



The Honorable Katie Hobbs
Governor of Arizona
1700 West Washington Street
Phoenix, Arizona 85007

September 2, 2025

Dear Governor Hobbs,

On behalf of its Board of Directors, the Arizona Historical Society (AHS) is pleased to submit its Fiscal Year (FY) 2027 Budget Request for your consideration, in accordance with Arizona Revised Statutes Title 35, Article 2, Section 113. Supporting documentation to this submission includes a current staff organization chart, and estimates and quotes for the works cited in the accompanying Funding Issues and Funding Issue Supplemental.

The **Mission** of AHS is to connect people through the power of Arizona's history. Its **Vision** is to be the driving force strengthening Arizona's communities by promoting history through leadership, partnership, and scholarship.¹

The agency serves the people of Arizona through the artifacts and archives it collects and preserves from their shared history, a history that extends from the earliest accounts of the state's indigenous cultures represented across thousands of years, to the impact and influence of Spanish and Mexican exploration and colonization, to the American expansion and the rugged individuals who trapped, homesteaded, and settled the west, to rapid development, urbanization, and technological innovation that defines the state moving forward. It is a history of many people, adversity, adaptability, and perseverance. It's in these histories that modern audiences find inspiration and define their shared surroundings, and it is through these histories that AHS celebrates the legacy and lessons of the state for its current and future generations.

In fulfillment of its statutory directives,² the Arizona Historical Society operates multiple museums and public research facilities, provides archival and educational services, publishes one of the nation's *leading* history journals, and manages and stewards historic sites, collections, and archives from Arizona's public history that are held in trust for the people of Arizona.

¹ <https://arizonahistoricalsociety.org/ahs-history/>

² A.R.S. § 41-821, A.R.S. § 41-823, and A.R.S. § 41-824

For FY27, AHS is requesting a permanent increase to its Annual Appropriations of **\$778,500**.

This year, the Arizona Historical Society is poised at a crossroads. It is riding high with public support and expectations after its funding successes in the 2025 Arizona Legislature. Its programs – CHI, NHD, field trips, reproductions and digitization – are established and growing. They are making a difference in the communities that they serve.

- The CHI program supports 67 of Arizona’s community museums, representing [most counties and districts](#) across the state, providing both expertise and guidance as well as direct financial support through its small grants program. With recent cuts to Federal and local grants and foundations, without AHS’ continued support, the sustainability of several would be in question if not for the CHI program. After the events of 2020, nearly half of Arizona’s museums (250) closed permanently, resulting in a total GVA loss of nearly **\$390 million**.
- NHD – Arizona’s “history science fair” – excited and engages middle and high school students in the creation of individual multimedia presentations, workshops, and research. Regional winners travel to and compete in at the State contest, and state winners travel and compete in Washington, D.C. for the chance to see their work exhibited in the White House and Smithsonian.
- Over **1,500** educational tour visitors (students, adult learners, and senior groups).
- Over **2,300** research requests and digital reproductions.
- 411 new artifacts, joining **85,000** collections and **12 million** archival materials.

To keep these programs and successes going, the agency needs to grow in its funding to cover its scaling costs. Lacking this, it will be required to limit and cap existing programs and services at their current levels, denying new audiences – especially those in the state’s more remote communities – the opportunity to access, enjoy, and benefit from Arizona’s history.

This increase is essential to the continuation of its current and future programs and services. It is best described through the attached 7 Funding Issues and 1 Funding Issue Supplemental.

The operational and budgetary deficiencies these Funding Issues represent are the direct result of two continuing obstacles and oversights.

1. Static and reductive appropriation budgets since FY19³
2. Frozen CIP fulfillment since FY23, resulting in increased damages and risks to health and safety

³ FY20’s appropriation of \$3,107,700 was a reduction from FY19’s appropriation of \$3,195,00. The agency’s FY26 appropriations - excluding SLI: Pioneer Museum - is only \$3,034,400.



FLAGSTAFF | TEMPE | TUCSON

Additional support – beginning with the first basic inflationary increase since FY20 – is overdue and necessary to bring the Arizona Historical Society to a sustainable level of operations.

As an agency of the State of Arizona, AHS has demonstrated its ability for sound fiscal management. Where a savings or new source of revenue exists, the agency pursues it. However, continuing discrepancies between these above-stated operational needs and the availability of appropriated or known enterprise funding mechanisms continue to limit the Society's long-term fulfillment of its statutory obligations. The agency requests – and requires – the State's support through the submitted Funding Issues. They are essential to significantly and positively affect the AHS' capacity to best serve the people of Arizona.

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

Sincerely,

A handwritten signature in black ink that reads 'David Breeckner'.

Dr. David Breeckner
Executive Director, Arizona Historical Society



FLAGSTAFF | TEMPE | TUCSON

Funding Issue Overview

Funding Issue	Funding Topic	Total
1	Employee Retention & Recruitment	\$310,500
2	Repair & Maintenance	\$250,000
3	IT Subscriptions & Hardware	\$50,000
4	CHI Grants	\$40,000
5	Utilities	\$35,000
6	Fleet Adjustment: Vehicles	\$60,000
7	NHD Support	\$15,000
8	In-State Travel	\$15,000
Supplemental	IT Subscriptions & Hardware	\$50,000
Total (Ongoing)		\$775,500
Total (One-Time)		\$50,000

Agency Detail

Duties & Services

Together the AHS staff and its governing Board discharge their responsibilities for meeting the agency's mission, specifically through the agency's:

- Storage and curated care of the state's physical and recorded history (collections and archives)
- Exhibitions – permanent and revolving – that tell the story and impact of those objects from its past
- Educational programs and lesson content, including Arizona's National History Day competition
- Publication of the internationally-acclaimed *Journal of Arizona History*
- Unique learning and research opportunities with State universities
- Statewide partnership, outreach, and support networks through its Certified Historical Institution (CHI) program
- Public programs that bring together the state's diverse communities around shared interests and their collective past

Fiscal Responsibility

As an agency of the State of Arizona, the Arizona Historical Society is committed to responsibly managing public funds in fulfillment of its mission and statutory obligations. AHS has successfully maintained positive or neutral budgets since FY20. As a responsive and responsible agency of the State of Arizona, AHS continues to pursue all available avenues to support its core operations and has a successful record of accomplishment. It completed and continued significant updates and changes to its operational structure from FY24 into FY25, accommodating changing fiscal realities.

- Divestiture of the agency's three historic properties and museum sites in Yuma to the City of Yuma, removing over \$1 million in repair and maintenance liability..
- Cost-savings from ongoing closure of the Pioneer Museum (Flagstaff) in FY25.
 - AHS worked with the Arizona legislature in FY25 to secure \$1,079,100 in one-time appropriations to fund Pioneer Museum from FY26 - FY28.
- Developing external contracts to operate facility rentals with revenue-sharing, reducing overhead while maintaining income/growing.
- Cancellation of underutilized agency subscriptions and services.
- Tighter controls on staff travel and statewide coverage.

Challenges

Despite these financial reforms and the success of the agency's programs and services, AHS struggled both operationally and financially in FY25. It continues to do so. Unexpected external factors in FY25 limited its ability to grow or meet earlier financial goals, and are expected to present ongoing challenges in FY27 and beyond.

- Cuts to Federal grant programs are anticipated to result in an annual **\$7.76m** (average) loss in funding to Arizona museums & libraries
 - As a result of the grant cancellations in spring 2025, AHS lost **\$213,000** in potential funding for FY26 (submitted applications).
- Changes to the Federal tax code, resulting from the passage of the "Big Beautiful Bill", will disproportionately impact AHS compared to other state agencies, by merit of its capacity to accept public donations and fundraise.
 - New limits on itemized deductions for wealthy donors
 - New, 1% cap on corporate giving
 - New taxes on estate giving and gifts
 - Increased taxation of "assets" held by Foundations
- Increased annual operational costs (e.g. subscriptions, utilities, travel) without proportionate increases to appropriations.
- Decaying and crumbling buildings overdue for refresh, with failing systems and significant health & safety risks.
 - AHS' FY26 budget allocates \$279,000 to repair and maintenance covering 11 buildings across 6 sites – **only \$25,363 per building annually**.
 - Known repair costs exceed **\$750,000** at multiple sites
- Broken or outdated equipment that prevents staff from doing their jobs and limits revenue generation.
- Salaries that are **25-50% below** the industry average in Arizona, resulting in poor staff morale, retention, and recruitment.
 - Multiple agency staff work second jobs to afford the cost of living in/around Tucson and Phoenix.

By the Numbers

To Collect

- The Arizona Historical Society's curated materials are in excess of **85,000** 3D artifacts and **12 million** 2D records. Together, these encompass **47,000** square feet in dedicated storage for stewarded objects and records.⁴
- The scope of AHS' collections varies from Geronimo's rifle to Barry Goldwater's HAM radio desk to a complete Baldwin #12 Locomotive.
- Its archives include historic photographs, maps, personal journals and letters, original film reels, original architectural renderings of iconic buildings, and oral histories from the state's "historymakers" (e.g. Marshall Trimble, Barry Goldwater, Karl and Stevie Eller, Navajo Code Talkers Merrill Sandoval and Joe Kellwood, and Governors Bruce Babbitt and Raúl Castro).

To Preserve

- The agency stewards 8 historic buildings across 4 counties in Flagstaff, Strawberry, Tucson, and Douglas. Several are on the State or National Register of Historic Places. These include Pioneer Museum (formerly the Coconino County Hospital – 1908), Strawberry Schoolhouse (1885), Charles O. Brown House (late 1840s), and Douglas Williams House (1909).
- Through its Certified Historic Institutions (CHI) program, AHS provides direct financial support through grants, professional services and guidance, and promotional recognition to other, qualifying historical societies and museums across the state.⁵ The Society's work goes beyond its own offices and storage to support all local efforts to best document and preserve important Arizona history. This reach extends to organizations in every county, in every corner of the state.⁶

⁴ AHC Tempe: 13,815 square feet. AHM Tucson: 31,145 square feet. Pioneer Flagstaff: 1,339 square feet. Yuma: 1,200 square feet.

⁵ <https://arizonahistoricalsociety.org/visit/ahs-certified-historical-institutions/>

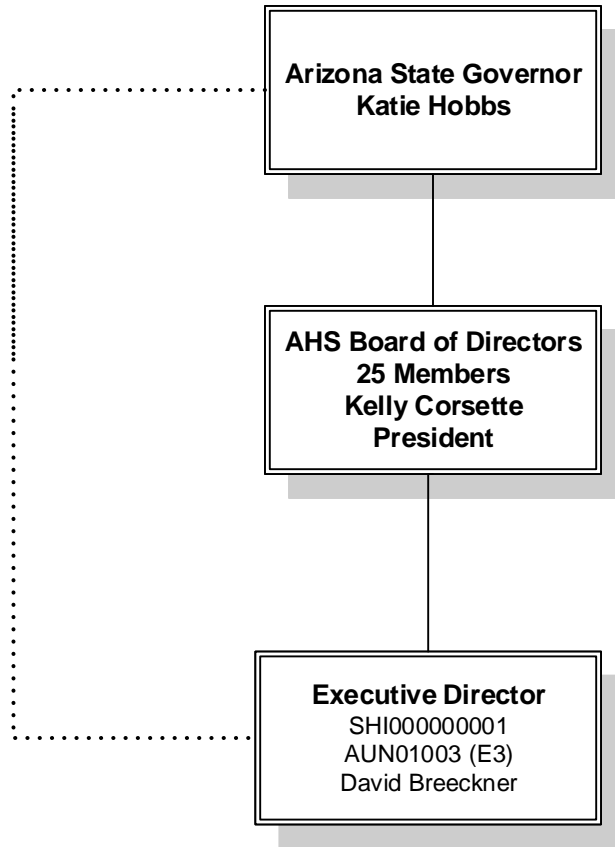
⁶ <https://arizonahistoricalsociety.org/visit/ahs-certified-historical-institutions/region/>

To Promote

- The Arizona Historical Society operates three museums statewide: Arizona History Museum (AHM) in Tucson (headquarters), Arizona Heritage Center (AHC) in Tempe, and Pioneer Museum in Flagstaff.
 - The three museums are distributed across the state and provide regional foci, helping to define **community identity**.
 - The scope of all three museums defines the public's education on the **State's identity** from Territorial Days to the present.
- AHS' Education services provide supporting materials for Arizona schools and teachers.
 - This includes traditional, on-site field trips and traveling, in-classroom lessons that align with Arizona College and Career Ready Standards.
 - With current restrictions in the time afforded to teach history in the Arizona classroom, AHS is a valuable resource to ensure that the history of Arizona is not excluded from the education of students state-wide.
- AHS operates the annual National History Day contest, which inspires teachers and students alike and provides exciting competitions transforming history education and instruction.⁷
 - In 2024, NHD AZ saw 34 students advance to the National Competition in Washington D.C., with 1 Arizona student placing first in the category of 'documentaries.'
- The *Journal of Arizona History* is now in its 66th year of continuous publication. Its digital reach in 2025 alone was **43,000** online readers and downloads.
- In 2024, AHS library and archives supported **2,339** research requests, with over **87** research and **650** volunteer **hours** logged by members of the public.
 - AHS provides annual Research Grants to support visiting scholars making use of AHS' on-site collections and archives to research and promote Arizona's history.

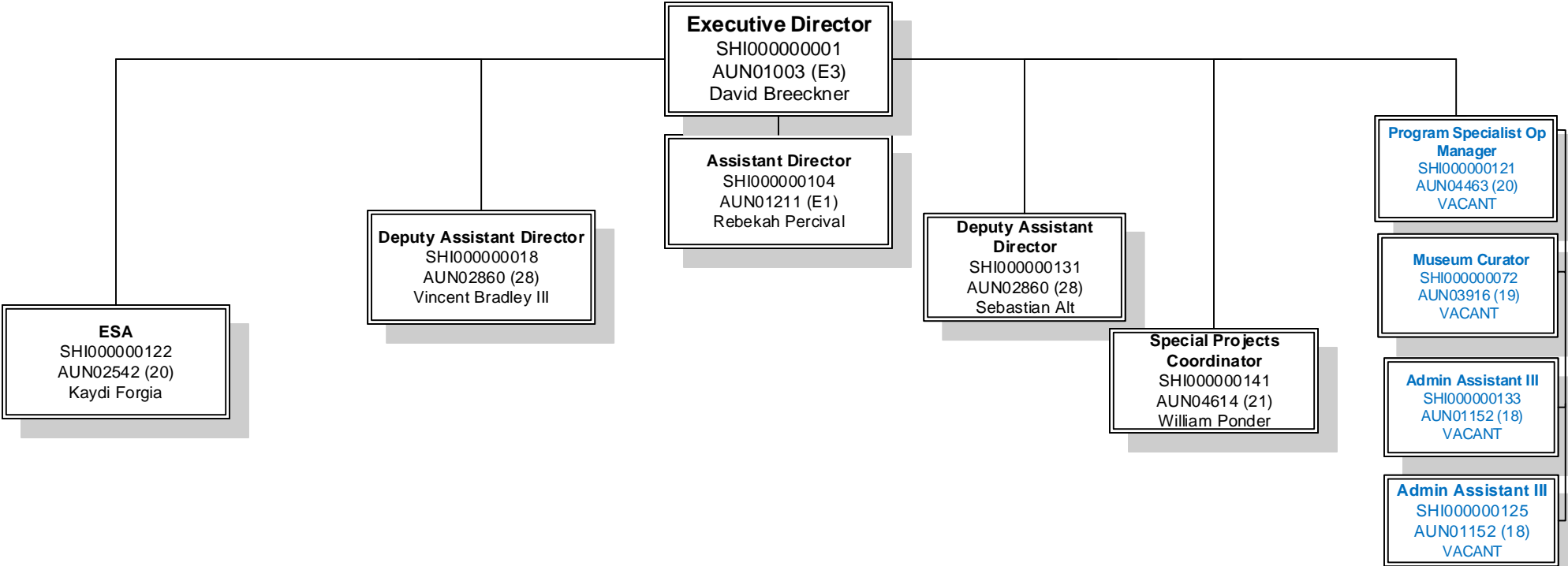
⁷ <https://arizonahistoricalsociety.org/education/national-history-day-arizona/>
<http://www.nhdaz.org>

**ARIZONA HISTORICAL SOCIETY
GOVERNING AUTHORITY**



ARIZONA HISTORICAL SOCIETY
(AHS)

08.25.2025



ARIZONA HISTORICAL SOCIETY
(LACEE)
LIBRARY, ARCHIVES, COLLECTIONS,
EXHIBITS & EDUCATION

Executive Director
SHI000000001
AUN01003 (E3)
David Breeckner

Assistant Director
SHI000000104
AUN01211 (E1)
Rebekah Percival

**Museum Curator 2
Collections Manager**
SHI000000128
AUN08218 (19)
Jace Dostal

Registrar
SHI000000017
AUN08220(18)
Kennedy Mesenbrink

Registrar
SHI000000021
AUN08220 (18)
Cody Taylor

Registrar
SHI000000038
AUN08220(18)
Melissa Baskin

Archivist
SHI000000106
AUN08222 (19)
Lyndsay Hertzig

Archivist
SHI000000005
AUN08222 (19)
Jennifer Shaffer Merry

Archivist
SHI000000002
AUN08222 (19)
Ella Breed

Archivist
SHI000000115
AUN08222 (19)
Rachael Black

**Education Program
Manager**
SHI000000026
AUN09130 (22)
Kristen Rex

**National History Day
Coordinator**
SHI000000140
AUN01774 (21)
Leonard Moody

Museum Educator
SHI000000138
AUN03916 (18)
Taylor Kyle

Museum Educator
SHI000000031
AUN03916 (18)
Emily Hahn

**Admin Assistant 3
Education**
SHI000000129
AUN01152(17)
VACANT

**Museum Curator 3
Exhibits Manager**
SHI000000030
AUN07290(20)
Vanessa Fajardo

Museum Curator 2
SHI000000137
AUN08218(19)
VACANT

Museum Preparator
SHI000000042
AUN08216(17)
Kiel Posner

Museum Preparator
SHI000000098
AUN08216(17)
Johnathan McCabe

**ARIZONA HISTORICAL SOCIETY
(GEODS)
GUEST EXPERIENCE, OUTREACH,
DEVELOPMENT & SALES**

08.25.2025

Executive Director
SHI000000001
AUN01003 (E3)
David Breeckner

**Deputy Assistant
Director**
SHI000000018
AUN02860 (28)
Vincent Bradley III

**Publications &
Communications**
SHI000000048
AUN05374 (22)
David Turpie

**Business Operations
Specialist & Gift Shop
Coordinator**
SHI000000127
AUN07259 (19)
Tamara McElwee

**Communications
Manager**
SHI000000135
AUN07082 (21)
Alexandra Bushman

Executive Consultant 1
SHI000000139
AUN01774(20)
Jaynie Adams

Admin Assistant 3
SHI000000055
AUN01152(17)
Elyssa Marley

Graphic Designer 2
SHI000000039
AUN08044 (19)
Cari Van Hecke

Associate Editor
SHI000000109
AUN08218 (19)
Christopher Bradley

Admin Assistant 3
SHI000000049
AUN01152 (17)
Todd Bailey

**ASO 1/Membership
Coordinator**
SHI000000061
AUN01152 (19)
VACANT

**ARIZONA HISTORICAL SOCIETY
(CHIEFF OP)**Compliance, HR, IT, Emergency Preparedness,
Finance, Facilities, Operations & Procurement**Executive Director**SHI000000001
AUN01003 (E3)
David Breeckner**Deputy Assistant
Director**SHI000000131
AUN02860 (28)
Sebastian Alt**SKILLBRIDGE
Facilities Manager**
SHI000000102
S20221
Troy Brasher**ASO 3/Compliance**
SHI000000045
AUN04638 (22)
VACANT**ASO 1/HR Liaison**
SHI000000099
AUN06895(19)
Salessia McGowan**ASO 4/CFO**
SHI000000130
AUN09005(23)
David Nagelski**Physical Plant
Supervisor**
SHI000000081
AUN04661(19)
Jose Rodriguez**Bldg Mainenance Spct**
SHI000000132
AUN03852 (17)
Peter Mueller-Martin**Custodial Crew
Supervisor**
SHI000000027
AUN03937(14)
Dennis Rogers**Grant Coordinator**
SHI000000136
AUN01952 (21)
Jason Mihalic**ASO 1/Accounting
Manager**
SHI000000134
AUN06895 (19)
Nicola Brownlee**Procurement Tech**
SHI000000123
AUN07368 (19)
Angel Villsenor



State of Arizona Budget Request

State Agency

Arizona Historical Society

A.R.S. Citation: A.R.S. § 41-821(A)

Appropriated Funds

Governor Hobbs:

This and the accompanying budget schedules, statements and explanatory information constitute the operating budget request for this agency for Fiscal Year 2027.

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

Total Amount Requested:

General Fund

FY 2026
Expenditure
Plan

FY 2027
Funding
Issue

FY 2027
Total
Request

4,113.5

775.5

4,889.0

4,113.5

775.5

4,889.0

Non-Appropriated Funds

FY 2026
Expenditure
Plan

FY 2027
Funding
Issue

FY 2027
Total
Request

Total Amount Planned:

Federal Grants Fund

Donations Fund

Historical Society Preservation/
Restoration Fund

Permanent AZ Historical Society
Revolving Fund

-

-

-

-

-

-

-

-

-

-

-

-

-

-

-

Agency Head: Dr. David Breeckner

Title: Executive Director

Arizona Historical Society Total:

4,113.5

775.5

4,889.0

David Breeckner

8/29/2025

(signature)

Phone: 4803875366

Prepared by: Rebekah Tabah-Percival

Email Address: rtabah@azhs.gov

Date Prepared: August 29, 2025

Revenue Schedule

Agency: Arizona Historical Society

Fund: AA1000 General Fund

AFIS Code	Category of Receipt and Description	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
4699	Miscellaneous Receipts	(0.1)	-	-
4823	Current Year Reimbursements (Refunds)	0.2	-	-
General Fund Total:		0.1	-	-

Forecast Methodology

Fund: HI2000 Federal Grants Fund

AFIS Code	Category of Receipt and Description	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
4231	State, Local, & Tribal Government Grants – Operating	2.3	-	-
Federal Grants Fund Total:		2.3	-	-

Forecast Methodology

Revenue Schedule

Agency:	Arizona Historical Society
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Fund:	HI2025 Donations Fund
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AFIS Code	Category of Receipt and Description	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
4339	Other Fees & Charges for Services	83.1	49.3	78.4
4372	Publications & Reproductions	24.9	45.8	23.9
4379	Other Charges for Goods	0.0	-	-
4449	Other Fees	49.9	75.0	50.0
4611	Unrestricted Donations	192.2	160.0	185.0
4612	Restricted Donations	2.6	100.0	45.0
4631	Treasurer's Interest Income	170.2	188.2	140.8
4699	Miscellaneous Receipts	1.4	7.6	1.9
4821	Prior Year Reimbursements (Refunds)	0.0	-	-
4823	Current Year Reimbursements (Refunds)	0.2	-	-
4901	Operating Transfers In	0.0	-	-
4911	Federal Transfers In	11.2	-	-
Donations Fund Total:		535.8	625.9	525.0

Forecast Methodology

Please see attached.

Fund:	HI2026 Non Expendable Trust Fund
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AFIS Code	Category of Receipt and Description	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
4631	Treasurer's Interest Income	7.7	-	-
Non Expendable Trust Fund Total:		7.7	-	-

Forecast Methodology

Revenue Schedule

Agency:	Arizona Historical Society
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Fund:	HI2125 Historical Society Preservation/Restoration Fund
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AFIS Code	Category of Receipt and Description	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
4339	Other Fees & Charges for Services	1.1	-	-
4372	Publications & Reproductions	22.3	41.0	21.3
Historical Society Preservation/Restoration Fund Total:		23.5	41.0	21.3

Forecast Methodology

Fund:	HI2900 Permanent AZ Historical Society Revolving Fund
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AFIS Code	Category of Receipt and Description	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
4320	Admission & Entry Fees	60.6	75.0	85.0
4339	Other Fees & Charges for Services	0.0	0.7	1.6
4372	Publications & Reproductions	7.1	13.0	6.8
4379	Other Charges for Goods	17.0	40.0	30.0
4631	Treasurer's Interest Income	16.5	26.8	19.2
4632	Rental Income	278.3	415.0	300.0
4823	Current Year Reimbursements (Refunds)	0.2	-	-
Permanent AZ Historical Society Revolving Fund Total:		379.6	570.5	442.6

Forecast Methodology

Please see attached.

Office of Strategic Planning & Budgeting
1700 W Washington St, Suite 500
Phoenix, AZ 85007

September 2, 2025

The Arizona Historical Society is pleased to provide its methodology for revenue forecasts for FY27 through FY29 for all funding sources over \$100,000.

FY27

- Unrestricted Donations – \$185,000.00 anticipated
 - The proposed forecast in donation-based revenue represents a practical expectation of growth based on agency performance in FY25, which exceeded original goals. It assumes a minimal level of performance matching fundraising efforts in FY25, but recognizes the possibility of external forces which may have positively impacted efforts disproportionately. Solicitation of unrestricted donations will be supported through the reopening of the Pioneer Museum, which will offer new opportunities for solicitation beyond the agency's current bases around Tucson and Tempe/Phoenix.
- Treasurer's Interest Income – \$160,000.00 anticipated
 - This refers to interest generated through the Treasury's management of AHS' restricted reserves. The projected revenue for FY27 was made based on declining returns on interest from these managed accounts in FY25. This revenue source will be subject to future reductions as these funds are expended to accommodate agency needs (from inadequate appropriations) in FY27 and beyond.
- Rental Income – \$300,000.00 anticipated
 - The estimated reduction in revenue to Rental Income represents an adjustment based on the agency's performance in this category in FY25, but assumes moderate programmatic growth from this revised benchmark. Based on the significant difference between budgeted and actual in FY25, a conservative approach has been applied to avoid future deficits.
 - The agency is currently working on a long-term solution to externally contract its facility rentals through a revenue-sharing model, reducing overhead and maintaining income. FY27 would be the first full year of this contract's implementation.

FY28

- Unrestricted Donations – \$250,000.00 anticipated
 - The proposed forecast in donation-based revenue represents a practical expectation of growth based on agency performance in FY25, which exceeded original goals. It assumes continued but moderate growth from FY27. Solicitation of unrestricted donations will be supported through the continued operations of the Pioneer Museum, which will have since established itself within Flagstaff and Coconino County and whose looming appropriations cut-off (see: SLI Pioneer Museum) can be leveraged for additional support.
- Treasurer's Interest Income – \$100,000.00 anticipated
 - This refers to interest generated through the Treasury's management of AHS' restricted reserves. The projected revenue for FY28 was adjusted based on declining returns on interest from these managed accounts in FY25, and as projected in FY26-27. This revenue source will be subject to future reductions as these funds are expended to accommodate agency needs (from inadequate appropriations) in FY28 and beyond.
 - This assumes a 30% reduction of the agency's Treasury-managed reserves, based on known (upcoming expenditures).
- Rental Income – \$350,000.00 anticipated
 - The estimated reduction in revenue to Rental Income represents an adjustment based on the agency's performance in this category in FY25, but assumes moderate programmatic growth from this revised benchmark. Based on the significant difference between budgeted and actual in FY25, a conservative approach has been applied to avoid future deficits.
 - The agency is currently working on a long-term solution to externally contract its facility rentals through a revenue-sharing model, reducing overhead and maintaining income. FY28 would be the second year of full operations under this contract, providing for greater returns as the contractor becomes more firmly established in their operations.
 - FY28 represents the first year that Pioneer Museum will likely be available for facility rentals, opening up new revenue streams in this category.

FY29

- Admission & Entry Fees – \$105,000.00 anticipated
 - By FY29, the agency anticipates admissions revenue to exceed \$100,000, assuming a moderate annual growth from FY25 returns of \$10,000.
 - This growth represents 20 new visitors daily to the agency's facilities, or 769 annually (compounding year-over-year). This growth will be facilitated and supported by the reopening of Pioneer Museum, but limited by the negative impacts of the site's seasonal visitorship.
- Other Fees and Charges for Services (Programs) – \$100,000.00 anticipated
 - By FY29, the agency anticipates charged services revenue to exceed \$100,000, assuming a moderate annual growth from FY25 returns of \$10,000 AND assuming fulfillment of **Funding Issue 3: IT Subscriptions and Hardware**. This category describes the likes of field trips, high resolution scanning, and microfilm processing.
 - The agency's field trip program at its Tempe and Tucson facilities has limited capacity for significant growth, based on currently budgeted staff.
 - This growth will be facilitated and supported by the reopening of Pioneer Museum, which will have been firmly established within the educational communities of Flagstaff and Coconino County by the start of FY29 (2 years full operational history).
- Unrestricted Donations – \$250,000.00 anticipated
 - The proposed forecast in donation-based revenue represents a practical expectation of growth based on agency performance in FY25, which exceeded original goals. It assumes continued but moderate growth from FY27 and FY28. Solicitation of unrestricted donations will be supported through the continued operations of the Pioneer Museum, which will have since established itself within Flagstaff and Coconino County and whose previous appropriations cut-off in FY28 (see: SLI Pioneer Museum) can be leveraged for additional support.

- It is unclear what additional potential for growth will become available to the agency beyond this current expectation.
- Rental Income – \$400,000.00 anticipated
 - FY29 represents the first year that the agency estimates to surpass its pre-FY25 Rental Income, following an adjustment in FY27 and FY28 based on the agency's performance in this category in FY25.
 - The agency is currently working on a long-term solution to externally contract its facility rentals through a revenue-sharing model, reducing overhead and maintaining income. FY29 would be the third year of full operations under this contract, providing for greater returns as the contractor becomes more firmly established in their operations.
 - FY29 anticipates that Pioneer Museum will be fully established and marketed as a site available for facility rentals, resulting in increased performance and revenue generation.

Sources and Uses

Agency:	Arizona Historical Society
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Fund:	HI2000 Federal Grants Fund
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Revenue from federal grants to be used as specified in the grant.

Cash Flow Summary	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Beginning Balance	0.1	0.1	0.1
Revenue (from Revenue Schedule)	2.3	-	-
Total Available	2.4	0.1	0.1
Total Appropriated Disbursements	-	-	-
Total Non-Appropriated Disbursements	2.3	-	-
Balance Forward to Next Year	0.1	0.1	0.1

Appropriated Expenditure	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Expenditure Categories			
Personal Services	-	-	-
Employee Related Expenditures	-	-	-
Professional & Outside Services	-	-	-
Travel In-State	-	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	-	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Appropriated Expenditure Sub-Total:	-	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-
Residual Equity Transfer	-	-	-

Sources and Uses

Agency:	Arizona Historical Society
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Fund:	HI2000 Federal Grants Fund
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Transfer Due to Fund Balance Cap	-	-	-
Prior Committed or Obligated Expenditures (no entry for AY)	-	-	-
Non-Appropriated 27th Pay Roll	-	-	-
Appropriated Expenditure Total:	-	-	-
Appropriated FTE	-	-	-

Non-Appropriated Expenditure			
Expenditure Categories	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	-	-	-
Employee Related Expenditures	-	-	-
Professional & Outside Services	-	-	-
Travel In-State	-	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	2.3	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Non-Appropriated Expenditure Sub-Total:	2.3	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-
Residual Equity Transfer	-	-	-
Transfer Due to Fund Balance Cap	-	-	-
Prior Committed or Obligated Expenditures (no entry for AY)	-	-	-
Non-Appropriated 27th Pay Roll	-	-	-
Non-Appropriated Expenditure Total:	2.3	-	-

Sources and Uses

Agency: Arizona Historical Society

Fund: HI2025 Donations Fund

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.

Cash Flow Summary

	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Beginning Balance	3,589.3	3,739.4	4,365.3
Revenue (from Revenue Schedule)	535.8	625.9	525.0
Total Available	4,125.1	4,365.3	4,890.3
Total Appropriated Disbursements	-	-	-
Total Non-Appropriated Disbursements	385.7	-	-
Balance Forward to Next Year	3,739.4	4,365.3	4,890.3

Appropriated Expenditure

Expenditure Categories	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	-	-	-
Employee Related Expenditures	-	-	-
Professional & Outside Services	-	-	-
Travel In-State	-	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	-	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Appropriated Expenditure Sub-Total:	-	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-

Sources and Uses

Agency:	Arizona Historical Society
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Fund:	HI2025	Donations Fund
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Proposed Fund Transfer	-	-	-
Residual Equity Transfer	-	-	-
Transfer Due to Fund Balance Cap	-	-	-
Prior Committed or Obligated Expenditures (no entry for AY)	-	-	-
Non-Appropriated 27th Pay Roll	-	-	-
Appropriated Expenditure Total:	-	-	-
Appropriated FTE	-	-	-

Non-Appropriated Expenditure			
Expenditure Categories	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	32.7	-	-
Employee Related Expenditures	14.8	-	-
Professional & Outside Services	24.5	-	-
Travel In-State	20.1	-	-
Travel Out-Of-State	7.1	-	-
Food	-	-	-
Aid To Organizations & Individuals	26.6	-	-
Other Operating Expenditures	245.6	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	14.3	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Non-Appropriated Expenditure Sub-Total:	385.7	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-
Residual Equity Transfer	-	-	-
Transfer Due to Fund Balance Cap	-	-	-
Prior Committed or Obligated Expenditures (no entry for AY)	-	-	-

Sources and Uses

Agency:	Arizona Historical Society		
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Fund:	HI2025	Donations Fund	
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Non-Appropriated 27th Pay Roll	-	-	-
Non-Appropriated Expenditure Total:	385.7	-	-
Non-Appropriated FTE	-	-	-

Sources and Uses

Agency: Arizona Historical Society

Fund: HI2026 Non Expendable Trust Fund

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.

Cash Flow Summary

	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Beginning Balance	161.1	168.8	168.8
Revenue (from Revenue Schedule)	7.7	-	-
Total Available	168.8	168.8	168.8
Total Appropriated Disbursements	-	-	-
Total Non-Appropriated Disbursements	-	-	-
Balance Forward to Next Year	168.8	168.8	168.8

Appropriated Expenditure

Expenditure Categories	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	-	-	-
Employee Related Expenditures	-	-	-
Professional & Outside Services	-	-	-
Travel In-State	-	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	-	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Appropriated Expenditure Sub-Total:	-	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-

Sources and Uses

Agency: Arizona Historical Society

Fund: HI2125 Historical Society Preservation/Restoration Fund

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.

Cash Flow Summary

	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Beginning Balance	101.7	104.9	145.9
Revenue (from Revenue Schedule)	23.5	41.0	21.3
Total Available	125.2	145.9	167.2
Total Appropriated Disbursements	-	-	-
Total Non-Appropriated Disbursements	20.3	-	-
Balance Forward to Next Year	104.9	145.9	167.2

Appropriated Expenditure

Expenditure Categories	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	-	-	-
Employee Related Expenditures	-	-	-
Professional & Outside Services	-	-	-
Travel In-State	-	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	-	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Appropriated Expenditure Sub-Total:	-	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-

Sources and Uses

Agency:	Arizona Historical Society
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Fund:	HI2125 Historical Society Preservation/Restoration Fund
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Residual Equity Transfer	-	-	-
Transfer Due to Fund Balance Cap	-	-	-
Prior Committed or Obligated Expenditures (no entry for AY)	-	-	-
Non-Appropriated 27th Pay Roll	-	-	-
Appropriated Expenditure Total:	-	-	-
Appropriated FTE	-	-	-

Non-Appropriated Expenditure			
Expenditure Categories	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	-	-	-
Employee Related Expenditures	-	-	-
Professional & Outside Services	-	-	-
Travel In-State	-	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	20.3	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Non-Appropriated Expenditure Sub-Total:	20.3	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-
Residual Equity Transfer	-	-	-
Transfer Due to Fund Balance Cap	-	-	-
Prior Committed or Obligated Expenditures (no entry for AY)	-	-	-
Non-Appropriated 27th Pay Roll	-	-	-

Sources and Uses

Agency:	Arizona Historical Society		
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Fund:	HI2125	Historical Society Preservation/Restoration Fund	
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Non-Appropriated Expenditure Total:	20.3	-	-
Non-Appropriated FTE	-	-	-

Sources and Uses

Agency:	Arizona Historical Society
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Fund:	HI2500 IGA and ISA Fund
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This fund was established for state agencies as a clearing account to properly account for, control, and report receipts and disbursements associated with intergovernmental and interagency service agreements, which are not reported in other funds.

Cash Flow Summary

	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Beginning Balance	-	-	-
Revenue (from Revenue Schedule)	-	-	-
Total Available	-	-	-
Total Appropriated Disbursements	-	-	-
Total Non-Appropriated Disbursements	-	-	-
Balance Forward to Next Year	-	-	-

Appropriated Expenditure

Expenditure Categories	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	-	-	-
Employee Related Expenditures	-	-	-
Professional & Outside Services	-	-	-
Travel In-State	-	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	-	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Appropriated Expenditure Sub-Total:	-	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-

Sources and Uses

Agency: Arizona Historical Society

Fund: HI2900 Permanent AZ Historical Society Revolving Fund

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.

Cash Flow Summary

	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Beginning Balance	575.9	245.5	816.0
Revenue (from Revenue Schedule)	379.6	570.5	442.6
Total Available	955.6	816.0	1,258.6
Total Appropriated Disbursements	-	-	-
Total Non-Appropriated Disbursements	710.1	-	-
Balance Forward to Next Year	245.5	816.0	1,258.6

Appropriated Expenditure

Expenditure Categories

	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	-	-	-
Employee Related Expenditures	-	-	-
Professional & Outside Services	-	-	-
Travel In-State	-	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	-	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Appropriated Expenditure Sub-Total:	-	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-

Sources and Uses

Agency:	Arizona Historical Society
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Fund:	HI2900 Permanent AZ Historical Society Revolving Fund
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Residual Equity Transfer	-	-	-
Transfer Due to Fund Balance Cap	-	-	-
Prior Committed or Obligated Expenditures (no entry for AY)	-	-	-
Non-Appropriated 27th Pay Roll	-	-	-
Appropriated Expenditure Total:	-	-	-
Appropriated FTE	-	-	-

Non-Appropriated Expenditure			
Expenditure Categories	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	148.1	-	-
Employee Related Expenditures	64.1	-	-
Professional & Outside Services	5.8	-	-
Travel In-State	1.4	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	490.5	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Non-Appropriated Expenditure Sub-Total:	710.1	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-
Residual Equity Transfer	-	-	-
Transfer Due to Fund Balance Cap	-	-	-
Prior Committed or Obligated Expenditures (no entry for AY)	-	-	-
Non-Appropriated 27th Pay Roll	-	-	-

Sources and Uses

Agency:	Arizona Historical Society		
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Fund:	HI2900	Permanent AZ Historical Society Revolving Fund	
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Non-Appropriated Expenditure Total:	710.1	-	-
Non-Appropriated FTE	-	-	-

Sources and Uses

Agency:	Arizona Historical Society
Fund:	HI3240 Crisis Contingency and Safety Net fund

Cash Flow Summary

	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Beginning Balance	-	-	-
Revenue (from Revenue Schedule)	-	-	-
Total Available	-	-	-
Total Appropriated Disbursements	-	-	-
Total Non-Appropriated Disbursements	-	-	-
Balance Forward to Next Year	-	-	-

Appropriated Expenditure

Expenditure Categories	FY 2025 Actuals	FY 2026 Estimate	FY 2027 Request
Personal Services	-	-	-
Employee Related Expenditures	-	-	-
Professional & Outside Services	-	-	-
Travel In-State	-	-	-
Travel Out-Of-State	-	-	-
Food	-	-	-
Aid To Organizations & Individuals	-	-	-
Other Operating Expenditures	-	-	-
Equipment	-	-	-
Capital Outlay	-	-	-
Capital Equipment	-	-	-
Non-Capital Equipment	-	-	-
Debt Service	-	-	-
Cost Allocation & Indirect Costs	-	-	-
Transfers-Out	-	-	-
Appropriated Expenditure Sub-Total:	-	-	-
Non-Lapsing Authority from Prior Years	-	-	-
Administrative Adjustments	-	-	-
Capital Projects (Land, Bldgs, Improv)	-	-	-
Appropriated 27th Pay Roll	-	-	-
Legislative Fund Transfers	-	-	-
IT Project Transfers	-	-	-
Proposed Fund Transfer	-	-	-
Residual Equity Transfer	-	-	-

Funding Issue List

Agency: **Arizona Historical Society**

FY 2027

Priority	Funding Issue Title	Total FTE	Total Amount	General Fund	Other Appropriated Funds	Non- Appropriated Funds
1	Employee Retention & Recruitment	-	310.5	310.5	-	-
2	Repair & Maintenance	-	250.0	250.0	-	-
3	IT Subscriptions and Hardware	-	50.0	50.0	-	-
4	Certified Historical Institutions (CHI) program	-	40.0	40.0	-	-
5	Utilities	-	35.0	35.0	-	-
6	Fleet Operating Adjustment (Operating Supplies): Vehicles	-	60.0	60.0	-	-
7	Statewide Education: National History Day	-	15.0	15.0	-	-
8	Statewide Operations: In-State Travel	-	15.0	15.0	-	-
Total:		-	775.5	775.5	-	-

Funding Issue Detail

Agency:	Arizona Historical Society
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Issue:	1	Employee Retention & Recruitment	Calculated ERE:	93.4
			Uniform Allowance:	

Program:	Arizona Historical Society
Fund:	AA1000 General Fund (Appropriated)

	Expenditure Categories	FY 2027
6000	Personal Services	147.1
6100	Employee Related Expenditures	63.4
	Subtotal Personal Services and ERE	210.5
	Program/Fund Total:	210.5

Program:	SLI Papago Park Museum
Fund:	AA1000 General Fund (Appropriated)

	Expenditure Categories	FY 2027
6000	Personal Services	70.0
6100	Employee Related Expenditures	30.0
	Subtotal Personal Services and ERE	100.0
	Program/Fund Total:	100.0

Issue:	2	Repair & Maintenance	Calculated ERE:	
			Uniform Allowance:	

Program:	Arizona Historical Society
Fund:	AA1000 General Fund (Appropriated)

	Expenditure Categories	FY 2027
7000	Other Operating Expenditures	250.0
	Program/Fund Total:	250.0

Issue:	3	IT Subscriptions and Hardware	Calculated ERE:	
			Uniform Allowance:	

Funding Issue Detail

Agency: Arizona Historical Society

Issue: 3 IT Subscriptions and Hardware

Program: Arizona Historical Society

Fund: AA1000 General Fund (Appropriated)

	Expenditure Categories	FY 2027
7000	Other Operating Expenditures	50.0
	Program/Fund Total:	50.0

Issue: 4 Certified Historical Institutions (CHI) program

Calculated ERE:
Uniform Allowance:

Program: SLI Field Services and Grants

Fund: AA1000 General Fund (Appropriated)

	Expenditure Categories	FY 2027
6800	Aid To Organizations & Individuals	40.0
	Program/Fund Total:	40.0

Issue: 5 Utilities

Calculated ERE:
Uniform Allowance:

Program: Arizona Historical Society

Fund: AA1000 General Fund (Appropriated)

	Expenditure Categories	FY 2027
7000	Other Operating Expenditures	35.0
	Program/Fund Total:	35.0

Issue: 6 Fleet Operating Adjustment (Operating Supplies): Vehicles

Calculated ERE:
Uniform Allowance:

Funding Issue Detail

Agency: Arizona Historical Society

Issue: 6 Fleet Operating Adjustment (Operating Supplies): Vehicles

Program: Arizona Historical Society

Fund: AA1000 General Fund (Appropriated)

	Expenditure Categories	FY 2027
7000	Other Operating Expenditures	60.0
	Program/Fund Total:	60.0

Issue: 7 Statewide Education: National History Day

Calculated ERE:
Uniform Allowance:

Program: Arizona Historical Society

Fund: AA1000 General Fund (Appropriated)

	Expenditure Categories	FY 2027
7000	Other Operating Expenditures	15.0
	Program/Fund Total:	15.0

Issue: 8 Statewide Operations: In-State Travel

Calculated ERE:
Uniform Allowance:

Program: Arizona Historical Society

Fund: AA1000 General Fund (Appropriated)

	Expenditure Categories	FY 2027
6500	Travel In-State	15.0
	Program/Fund Total:	15.0

Funding Issue Narrative

Agency: Arizona Historical Society

Issue: 1 Employee Retention & Recruitment

Description of Issue: The combined FY26 appropriation for the Operating Budget and Papago Park Museum funds of the Arizona Historical Society is \$2,967,500; of this, \$2,539,705 is committed to payroll and ERE costs. This cost represents and consumes 85% of state appropriations for all agency-wide operations. This insufficiency fails to meet the agency's current operating needs, let alone its FY27 budget with any planned retention or performance-based increases.

From the FY26 Appropriations Report, \$1,939,100 of the total \$2,394,900 Operating Budget is assigned toward PS/ERE for 40.4 FTE Positions. For the Papago Park Museum fund in the FY26 Appropriations Report, which includes 10 FTE positions, the entire annual appropriation is only \$572,600 whereas the PS/ERE costs for the 10 lowest-paid FTE positions at this facility are \$600,605. If taken as directed, this fund alone already suffers from a \$28,005 deficit just on staffing alone and without consideration of the added operating or maintenance costs for an 80,500 sq ft building. Since FY23, the agency has struggled with employee retention and recruitment as a result of its staff salaries. This has resulted in several long-term vacancies across multiple fiscal years. These vacancies have provided line-item savings within the PS/ERE categories of past agency budgets, and been essential for the agency's past ability to manage a neutral budget since FY23 DESPITE those budget years featuring assumed year end deficits. These budgetary savings and belt-tightening has conversely impacted the agency's operations, limiting its capacity to conduct business - both statutory and revenue-generating. As positions are finally filled and staff retained for more than 1 year, these vacancy savings will begin to dwindle and disappear as the agency becomes fully staffed once more.

Proposal: \$210,500 increase to "Operating Budget" annual appropriation (FY27-onward).
\$100,000 increase to "Papago Park Museum" annual appropriation (FY27-onward).

These funds would support employee retention and recruitment. The last merit and/or retention-based salary increases within the agency occurred in Q2 of FY24, were capped at a modest 3-5% increase from FY22 and FY23 salaries, and only affected roughly one-third of agency positions. Otherwise, salaries have remained frozen and are continuously outpaced by inflation and competition from both other Arizona state agencies and the private sector. Many of the salaries of the agency's specialized positions are 25-50% below the statewide average. A significant increase – representing a reinvestment in state personnel by the State of Arizona – is not only overdue, but essential to ensure staff retention (and future recruitment) in FY27 and beyond. The amounts of the requested increases would, together, represent a 10% increase to staff salaries that rectifies the flat-salary budgets managed across FY24, FY25, and FY26. Collectively, this increase represents a basic, cost-of-living adjustment commensurate with rising costs in Arizona's two largest cities.

Alternatives Considered: There are no suitable alternatives or substitutes for reasonable compensation, particularly for those positions within the agency that are industry-specific and which require advanced degrees (limiting the candidate pool for retention and recruitment). Many of the agency's staff have been forced into secondary employment to meet their basic needs (up to 50% in some supervisory teams).

Impact of Not Funding This Year: As reported by mid-level supervisors to the agency's Senior Leadership, open conversations are already occurring among staff regarding dissatisfaction with agency pay rates. If left uncorrected, the agency estimates the resignation and departures of no less than one-quarter of its budgeted staff by FY27. These vacancies, occurring primarily within the agency's archival, education, guest experience, collections, and exhibits teams would significantly restrict revenue generation and the agency's capacity to meet its governing State Statutes to preserve, educate, and exhibit its 85,000 artifacts and 12 million archival materials, including documents, photos, films, oral histories, maps, and architectural drawings.

Statutory Reference:

- A.R.S. 41-821.K
- A.R.S. 41-823.A.1-4
- A.R.S. 41-823.B
- A.R.S. 41-824

Equipment to be Purchased (if applicable): N/A

Classification of New Positions: N/A

Annualization(s): N/A

Funding Issue 1

Employee Retention & Recruitment

Title in Detail Budget Book:

Operating Budget, Papago Park Museum

Fund Source: General Fund

Proposal:

\$210,500 increase to “Operating Budget” annual appropriation (FY27-onward).¹

\$100,000 increase to “Papago Park Museum” annual appropriation (FY27-onward).²

These funds would support employee retention and recruitment. The last merit and/or retention-based salary increases within the agency occurred in Q2 of FY24, were capped at a modest 3-5% increase from FY22 and FY23 salaries, and only affected roughly one-third of agency positions. Otherwise, salaries have remained frozen and are continuously outpaced by inflation and competition from both other Arizona state agencies and the private sector.³ Many of the salaries of the agency’s specialized positions are **25-50%** below the statewide average. A significant increase – representing a reinvestment in state personnel by the State of Arizona – is not only overdue, but essential to ensure staff retention (and future recruitment) in FY27 and beyond.

The amounts of the requested increases would, together, represent a 10% increase to staff salaries that rectifies the flat-salary budgets managed across FY24, FY25, and FY26. Collectively, this increase represents a basic, cost-of-living adjustment commensurate with rising costs in Arizona’s two largest cities.

¹ \$147,135 to Payroll; \$63,365 to ERE.

² \$70,000 to Payroll; \$30,000 to ERE.

³Price Inflation (Phoenix) – 2021: 5.01%, 2022: 11.51%, 2023: 5.18%, 2024: 2.22%
<https://www.in2013dollars.com/Phoenix-Arizona/price-inflation>

Description of Issue:

The combined FY26 appropriation for the Operating Budget and Papago Park Museum funds of the Arizona Historical Society is \$2,967,500; of this, \$2,539,705 is committed to payroll and ERE costs.⁴ This cost represents and consumes **85%** of state appropriations for all agency-wide operations. This insufficiency fails to meet the agency's current operating needs, let alone its FY27 budget with any planned retention or performance-based increases.

From the FY26 Appropriations Report, \$1,939,100 of the total \$2,394,900 Operating Budget is assigned toward PS/ERE for 40.4 FTE Positions. For the Papago Park Museum fund in the FY26 Appropriations Report, which includes 10 FTE positions, the entire annual appropriation is only \$572,600 whereas the PS/ERE costs for the 10 lowest-paid FTE positions at this facility are \$600,605. If taken as directed, this fund alone already suffers from a **\$28,005 deficit** just on staffing alone and without consideration of the added operating or maintenance costs for an 80,500 sq ft building.

Since FY23, the agency has struggled with employee retention and recruitment as a result of its staff salaries. This has resulted in several long-term vacancies across multiple fiscal years. These vacancies have provided line-item savings within the PS/ERE categories of past agency budgets, and been essential for the agency's past ability to manage a neutral budget since FY23 DESPITE those budget years featuring assumed year-end deficits. These budgetary savings and belt-tightening has conversely impacted the agency's operations, limiting its capacity to conduct business - both statutory and revenue-generating. As positions are finally filled and staff retained for more than 1 year, these vacancy savings will begin to dwindle and disappear as the agency becomes fully staffed once more.

⁴ Together, describing 50.4 FTE positions.

Payroll: Budgeted	FY23	FY24	FY25	FY26	FY27
Budgeted Staff	47	49	43	46	46
Personnel Services	\$ 2,283,066	\$ 2,335,759	\$ 2,153,140	\$ 2,153,140	\$ 2,551,880
ERE	\$ 984,458	\$ 970,774	\$ 928,434	\$ 928,434	\$ 1,097,308
Total	\$ 3,267,524	\$ 3,306,533	\$ 3,081,574	\$ 3,081,574	\$ 3,649,188

Payroll: Actual	FY23	FY24	FY25	FY26	FY27
Staff by Q1	36	40	34	36	N/A
Personnel Services	\$ 1,927,497	\$ 1,925,110	\$ 1,844,262	N/A	N/A
ERE	\$ 794,485	\$ 761,212	\$ 755,922	N/A	N/A
Total	\$ 2,721,982	\$ 2,686,322	\$ 2,600,184	N/A	N/A

Alternatives considered:

There are no suitable alternatives or substitutes for reasonable compensation, particularly for those positions within the agency that are industry-specific and which require advanced degrees (limiting the candidate pool for retention and recruitment). Many of the agency's staff have been forced into secondary employment to meet their basic needs (up to 50% in some supervisory teams).

Impact of not funding this year:

As reported by mid-level supervisors to the agency's Senior Leadership, open conversations are already occurring among staff regarding dissatisfaction with agency pay rates. If left uncorrected, the agency estimates the resignation and departures of no less than **one-quarter** of its budgeted staff by FY27. These vacancies, occurring primarily within the agency's archival, education, guest experience, collections, and exhibits teams would significantly restrict revenue generation and the agency's capacity to meet its governing State Statutes to preserve, educate, and exhibit its **85,000**

artifacts and **12 million** archival materials, including documents, photos, films, oral histories, maps, and architectural drawings.

Statutory reference:

- A.R.S. 41-821.K
- A.R.S. 41-823.A.1-4
- A.R.S. 41-823.B
- A.R.S. 41-824

Equipment to be purchased (if applicable):

N/A

Classification of new positions:

N/A

Annualization(s):

N/A

Alignment with agency's strategic plan or statutory responsibilities:

By statute, the Arizona Historical Society may “employ or authorize the employment of other employees it considers appropriate to carry out the functions of the society”, with these functions principally defined as the acquisition, care and preservation, and application (through exhibition, education, and publication) of historical materials. Due to the technical nature of this work, many of these positions require an advanced degree, limiting the pool of qualifying candidates for recruitment and retention.

This proposal meets the agency's following strategic objectives:

- To make AHS the most trusted authority on Arizona history;
- To enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history;

- To Develop experiences that are meaningful and relevant to today's audiences; and
- To Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Impact on historically underserved, marginalized, or adversely affected groups:

The mission of the Arizona Historical Society is to “connect others through the power of Arizona’s history.” A trained and experienced staff is essential to this effort. Lacking these staff, the agency is unable to meet its mission. Citing examples within specific teams and departments within the agency:

- Curators and archivists manage the collections and archival holdings of the state, which document and preserve the collective and individual histories of peoples and communities across Arizona since its territorial beginnings. These records include lost and marginalized groups such as the state’s 22 tribes, historically-black neighborhoods (e.g. Okemah), demolished frontier barrios, and Japanese-Americans during WWII internment. This work is continuous and ever-present, as agency staff actively solicit and make available new acquisitions documenting these imperiled histories and perspectives within the state.
- Educators lead in-building field trips that principally serve K-12 students across Arizona’s two largest cities, including numerous districts with historically marginalized populations. AHS educators additionally lead and support students in local/state universities, as well as adult learners.
- Educators support rural schools and education through both its “Museum in a Box” traveling field trip program and its state-wide National History Day (NHD) competition. In FY25, over 300 students participated in NHD, with 34 winning state contests to present and compete at the national level in Washington, D.C.
- Editors of the Journal of Arizona History work with scholars and community leaders to create quarterly publications that explore and add life to these often overlooked histories, making them available to statewide, national, and international audiences.
- Guest Experience staff are responsible for the opening and daily operations of the agency’s public-facing museums and community programs, through which these accumulated and stewarded histories are most widely accessed and enjoyed.

How has feedback been incorporated from groups directly impacted by proposal:

This proposal is in direct response to the criticisms and concerns raised by agency staff. From the agency's 2025 Employee Engagement Survey, 28.5% of all responding staff did not plan to remain with the agency in two years' time.

Description of how this furthers the Governor's priorities:

In the Governor's FY26 draft Executive Budget, a 2-3% increase to all State employees was proposed, in recognition of significant discrepancies and shortcomings between state salaries and the private sector. This increase is commensurate with that original proposal, but adjusted to resolve a lack of increase within the agency for the last 3 consecutive fiscal years.

If requesting GF, why is it critical to continued operations?

At this time, AHS cannot adequately compensate its existing staff for their assigned work and the required educational and experience-based employment qualifications and KSIs. Without an increase, the agency expects to lose a significant portion of its qualified and experienced staff, significantly reducing its operational capacity and services. This loss will, in turn, compound financial losses resulting from abandoned or diminished revenue programs and sources.

If requesting GF, why can't existing funding fully or partially meet the need?

AHS does not have sufficient funds within its annual budget to accommodate a project of this nature. Significant budgetary changes to the agency – updates to revenue goals and reductions in FY24, including the closure of one facility and divestiture of three properties – were already implemented to achieve a balanced budget for FY25; an increase of this sort is not possible at this time given those changes already made.

If requesting GF, why can't other funds fully or partially meet the need?

The only other financial resource that the agency possesses are its HI2025 "Statewide Donations" fund. Although appearing in GAO reports as a singular lump-sum, these funds were voted on by the AHS State Board in November 2023 to be sequestered as restricted funds in support of various capital development projects - often in reflection of the wishes of the original donors. The agency is presently working to reallocate these funds to those restricted



subfunds within HI2025, in accordance with its Board's wishes. As a result, these funds are not available for use towards this Funding Issue.



ARIZONA HISTORICAL SOCIETY

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FY26 In Grades Due			Flagstaff FY26			Flagstaff FY27 IN Grades due		
SHI000000140	\$26.40	\$54,912.00	SHI000000121	\$ 30.00	\$ 62,400.00	\$ 33.00	\$ 68,640.00	
SHI000000018	\$42.90	\$89,232.00	SHI000000137	\$ 21.00	\$ 43,680.00	\$ 23.10	\$ 48,048.00	
SHI000000131	\$44	\$91,520.00	SHI000000133	\$ 16.50	\$ 34,320.00	\$ 18.15	\$ 37,752.00	
SHI000000104	\$46.20	\$96,096.00	SHI000000072	\$ 18.00	\$ 37,440.00	\$ 19.80	\$ 41,184.00	
SHI000000139	\$23.10	\$48,048.00						
FY25 Approved still due			FY26 In Grades Due					
SHI000000099	\$21.20	\$44,096.00	SHI000000038	\$22.00	\$45,760.00			
SHI000000115	\$23.60	\$49,088.00	SHI000000140	\$26.40	\$54,912.00			
SHI000000030	\$23.54	\$48,963.20	SHI000000018	\$42.90	\$89,232.00			
FY26 In Grades Due			SHI000000131	\$44	\$91,520.00			
SHI000000132	\$26.63	\$41,542.80	SHI000000104	\$46.20	\$96,096.00			
SHI000000001	\$72.72	\$151,249.90	SHI000000139	\$23.10	\$48,048.00			
SHI000000048	\$40.83	\$84,917.87	SHI000000049	\$20.27	\$42,156.40			
SHI000000141	\$41.80	\$65,208.00	SHI000000109	\$24.20	\$50,336.00			
SHI000000055	\$20.27	\$42,167.84	SHI000000002	\$24	\$ 49,920.00			
SHI000000128	\$27.50	\$57,200.00	SHI000000135	\$25.30	\$ 52,624.00			
			SHI000000031	\$23.10	\$48,048.00			
			SHI000000106	\$24.20	\$50,336.00			
			SHI000000138	\$23.10	\$48,048.00			
			SHI000000017	\$22.00	\$45,760.00			
			SHI000000130	\$39.60	\$82,368.00			
			SHI000000042	\$21.00	\$43,680.00			
			SHI000000081	\$28.60	\$59,488.00			



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715 S. Main Street
Florence, AZ 85132
520-868-4382

PART-TIME COLLECTIONS MANAGER

Essential Functions:

The Collections Manager performs a variety of tasks within the Pinal County Historical Museum's Collection and Archives. The Collections Manager will be responsible for:

- Lead an inventory of PCHM's collections
- Match PastPerfect records to artifacts
- Move artifacts into storage
- Rehouse artifacts as needed to meet industry standards
- Enter data into PastPerfect
- Ensure the integrity of data in PastPerfect
- Assist the Director in data migration to PastPerfect online
- Occasional assistance to staff and volunteers for the location and retrieval of collections
- Assist with deaccessioning
- Assist the Director with long-term planning of the collection's storage area
- Other tasks as needed. Depending on interests/background, opportunities to assist with exhibits and grant writing

Minimum Qualifications:

- One or more years of professional museum experience and/or any relevant education and background
- Bachelor's degree in history, anthropology, archaeology, museum studies, archival studies, information, library science, or a related field
- Experience with data entry

Preferred Qualifications:

- Ability to move objects up to 50 pounds
- Experience with a collections management database
- Experience with museum inventory
- Paid experience working in museum collections management
- Experience deaccessioning objects from a museum collection using best practices
- Experience in a role focused on Collections Management, Registrar, or exhibit design and implementation

Schedule:

- This is a one-year grant-funded position, but may be extended depending on museum funding
- 20-25 hours per week

Hourly Pay:

- \$25 per hour

Supervisor:

- Director

Application requirements:

Please submit questions, a letter of interest, and your CV/Resume to director@pchmuseum.org



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MUSEUM ASSOCIATION OF ARIZONA

Building a Vital Museum Community

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JOB LISTINGS

This page lists museum employment opportunities in Arizona only. For information on museums jobs outside of the state visit these websites:

[American Alliance of Museums](#)

[American Association for State and Local History](#)

[Western Museum Association](#)

[Global Museum](#)

[National Council on Public History](#)

[Museum Jobs](#)

In the interests of transparency and equity in hiring MAA will only post job descriptions that include salary ranges.

Job postings will remain on this site for two months, unless an earlier application deadline is provided by the employer

[Registrar, Collections & Exhibitions](#)

Center for Creative Photography, University of Arizona (Tucson AZ)

Oversees the management and storage of the fine print collections; Works with CCP's curatorial and conservation staff to coordinate traveling exhibitions, including loan agreements, transport, installation, condition reporting, insurance, and storage. Salary range: \$65,687 - \$85,393. [0612]

[Outreach Coordinator \(Part-time\)](#)

Boyce Thompson Arboretum (Superior AZ)

Coordinate and schedule outreach visits to surrounding schools and communities; Develop, design, implement and maintain inquiry-based, student-centered curricula and programs for elementary, middle, and high school students based on Arizona Science Standards and Next Generation Science Standards; Work



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closely with the Education Director to provide professional development workshops to educators including material and content development. Salary: \$20/hour (up to 20 hours/week). [0623]

Temporary Historical Archivist (Part-time)

Boyce Thompson Arboretum (Superior, AZ)

Responsible for the access to, professional care, daily management, and maintenance of the Arboretum's archives including its organization, preservation, and storage. Salary: \$30/hour (20 hours per week). [0623]

Experience Curator

Idea Museum, City of Mesa Arts and Culture (Mesa AZ)

Responsible for leading the vision, planning, and execution of exhibitions and interactive experiences throughout the museum; and serving as a creative leader in shaping the museum's artistic vision and its connection to the community. Salary: \$71,447.38 - \$97,620.22. [0713]

Community Engagement Coordinator (Museum Assistant)

S'edav Va'aki Museum (Phoenix AZ)

Oversee the administration of all front-of-house visitor experiences, including the training, supervising, scheduling, and managing of visitor services staff and volunteers. This position is also responsible for the museum's social media, website and marketing functions and is charged with creating and maintaining partnerships with other organizations to support the museum's mission. Hiring Range: \$30.31-35.08/hour. [0807]

Deadline: August 19, 2025

Education Manager

Desert Caballeros Western Museum (Wickenburg, AZ)

The Education Manager is the Museum's educational programming coordinator. They develop and implement Museum education programs, both in-house and outreach. Develops, executes, and evaluates training program for volunteers and docents. Full Time, 32 Hours. Salary: \$42,000-44,000/year. [0815]

Collections Manager (Part-time)

Pinal County Historical Society (Florence AZ)

The Collections Manager will be responsible for leading an inventory of PCHM's collections; assisting the Director in data migration to PastPerfect online; assistance to staff and volunteers for the location and retrieval of collections; and assisting the Director with long-term planning of the collection's storage area. This is a one-year grant-funded position, but may be extended depending on museum funding. 20-25 hours/week. Salary: \$25.00/hour. Please submit questions, a letter of interest, and your CV/Resume to director@pchmuseum.org. [0815]

Museum Archives and Collections Assistant (Part-time)

390th Memorial Museum Foundation (Tucson AZ)

Assistant works onsite three full days per week (24 hours/week) with volunteers and staff to examine, accurately describe, photograph, and safely store important historic artifacts in the museum's collections. Salary: \$19.00. This position is eligible for our full benefits package of medical, vision, and dental insurance.

Development Manager

SciTech Institute (Phoenix AZ)

Advance the fundraising efforts of the Development Team as it relates to individual and corporate giving. They will develop and manage a robust portfolio of individual and corporate prospects, conducting face-to-



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face solicitations, in addition to building marketing campaigns to engage these donors. Hybrid: Remote and In Office or In Person Events & Meetings. Salary: \$62,000-\$66,000. [0819]

To have a listing added to this page please e-mail the information to azmuseums@gmail.com. The listing should include a brief description of the position and a link to a full description on the organization's website. All job listings must include a salary range. Job listings will remain on the MAA Website for 60 days unless otherwise requested.

Museum Association of Arizona

P.O. Box 63902,
Phoenix, Arizona 85082

azmuseums@gmail.com





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----- Forwarded message -----

From: [REDACTED]
Date: Thu, Jun 12, 2025, 11:13 AM
Subject: [MCC] Job Opening - Tucson AZ
To: <museum-collections-care@googlegroups.com>

Registrar, Collections & Exhibitions

Center for Creative Photography, University of Arizona (Tucson AZ)

Oversees the management and storage of the fine print collections; Works with CCP's curatorial and conservation staff to coordinate traveling exhibitions, including loan agreements, transport, installation, condition reporting, insurance, and storage. Salary range: \$65,687 - \$85,393

Full Job Description:

<https://arizona.csod.com/ux/ats/careersite/4/home/requisition/22325?c=arizona&sq=req22325>

Funding Issue Narrative

Agency: Arizona Historical Society

Issue: 1 **Employee Retention & Recruitment**

Alignment with Agency's Strategic Plan or Statutory Responsibilities:

By statute, the Arizona Historical Society may "employ or authorize the employment of other employees it considers appropriate to carry out the functions of the society", with these functions principally defined as the acquisition, care and preservation, and application (through exhibition, education, and publication) of historical materials. Due to the technical nature of this work, many of these positions require an advanced degree, limiting the pool of qualifying candidates for recruitment and retention.

Impact on Historically Underserved, Marginalized, or Adversely Affected Groups:

The mission of the Arizona Historical Society is to "connect others through the power of Arizona's history." A trained and experienced staff is essential to this effort. Lacking these staff, the agency is unable to meet its mission. Citing examples within specific teams and departments within the agency:

- Curators and archivists manage the collections and archival holdings of the state, which document and preserve the collective and individual histories of peoples and communities across Arizona since its territorial beginnings. These records include lost and marginalized groups such as the state's 22 tribes, historically-black neighborhoods (e.g. Okemah), demolished frontier barrios, and Japanese-Americans during WWII internment.
- This work is continuous and ever-present, as agency staff actively solicit and make available new acquisitions documenting these imperiled histories and perspectives within the state.
- Educators lead in-building field trips that principally serve K-12 students across Arizona's two largest cities, including numerous districts with historically marginalized populations. AHS educators additionally lead and support students in local/state universities, as well as adult learners.
- Educators support rural schools and education through both its "Museum in a Box" traveling field trip program and its state-wide National History Day (NHD) competition. In FY25, over 300 students participated in NHD, with 34 winning state contests to present and compete at the national level in Washington, D.C.
- Editors of the Journal of Arizona History work with scholars and community leaders to create quarterly publications that explore and add life to these often overlooked histories, making them available to statewide, national, and international audiences.
- Guest Experience staff are responsible for the opening and daily operations of the agency's public-facing museums and community programs, through which these accumulated and stewarded histories are most widely accessed and enjoyed.

How has feedback been incorporated from groups directly impacted by proposal?:

This proposal is in direct response to the criticisms and concerns raised by agency staff. From the agency's 2025 Employee Engagement Survey, 28.5% of all responding staff did not plan to remain with the agency in two years' time.

Description of how this furthers the Governor's priorities:

In the Governor's FY26 draft Executive Budget, a 2-3% increase to all State employees was proposed, in recognition of significant discrepancies and shortcomings between state salaries and the private sector. This increase is commensurate with that original proposal, but adjusted to resolve a lack of increase within the agency for the last 3 consecutive fiscal years.

Issue: 2 **Repair & Maintenance**

Description of Issue:

The schedule for regular maintenance of the agency's 3 facilities and 3 historic sites (totaling 11 structures) is inadequate against existing issues for repair. All sites suffer from previously-deferred maintenance, which compounds new issues that continue to emerge. All of its facilities and sites are at least 75 years in age, with the exception of the Arizona Heritage Center (Tempe) which has just passed its 30-year maintenance period without refresh. AHS has submitted its most pressing needs in its CIP reports, current through to its recent FY27 submission. An increase to annual appropriations to defray these costs will have a positive impact on the State's overall expenditures, reducing annual requests through the CIP process. Historic CIP requests and fulfillment rates demonstrate intermittent success in obtaining project-specific support; additional funding directly to AHS will ensure essential sites and systems are taken off a schedule of deferred maintenance - or otherwise continue to fail and go unaddressed.

The lack of fulfillment from the agency's annual CIP requests has required AHS to spend above its own allocated budget for "Repair & Maintenance" year-over-year. These overruns reflect the true cost of simply maintaining the agency's multitude of historical sites and modern facilities, without even speaking to longer-term upgrades and improvements. Costs are now increasing as more systems begin to fail and the required repairs compound in their severity and urgency.

Proposal:

\$250,000 increase to "Operating Budget" annual appropriations (FY27-onward).

Funding Issue Narrative

Agency: Arizona Historical Society

Issue: 2 Repair & Maintenance

Alternatives Considered:	<p>In FY24 and FY25, AHS pursued funding options to defray agency costs to maintain and repair its facilities and sites through state and Federal grants, risk management claims (when appropriate), use of its restricted reserves, property transfers, and partnered cost-sharing. These included:</p> <ul style="list-style-type: none"> - SHPO Heritage Grant applications - Transfer-out to City of Yuma of its 3 historic properties (Sanguinetti House, Mellon House, Molina Block) - Facility lease operating agreements with tenants managing upkeep - Draw-down from the agency's HI2025 restricted "Facilities & Sites" subfund to manage one-time project costs - Public partnerships to externally fund and manage facility repairs and improvements (e.g. Friends groups for ADA lifts, ADA railings, etc) - Repeated requests for additional funding through the annual CIP process <p>Despite these efforts, the agency struggles with a portfolio of historic buildings whose accumulated costs for repairs exceed the agency's budgeted capacity to maintain them. AHS' current efforts and resources are often used in response to an immediate facilities incident, and not routine or preventative as desired.</p>
Impact of Not Funding This Year:	<p>The current schedule of repairs will continue as planned, using the \$279,000 amount previously allocated in FY25 and anticipated in FY26. Unfortunately, the agency's anticipated funding schedule for "Repair and Maintenance" has been subject to over-spending in both FY24 and FY25. In FY24, the agency spent \$390,000 of its allocated \$250,000 (\$140,000 overage). In FY25, the agency spent \$423,000 of its \$279,000 (\$144,000 overage). This pattern reveals the TRUE costs of the agency at its barest requirements for operations, safety, and upkeep, and the significant gap in its funding reality to accomplish these statutory tasks. Moreover, due to this continued policy of deferred maintenance, the repairs costs are increasing each year - requiring an even greater investment by the State to correct.</p> <p>This deferred maintenance backlog is significantly impacting not only the continuity of operations but now presents active threats to the safety and well-being of the agency's personnel, unique assets, and visiting members of the public. Examples of this include:</p> <ul style="list-style-type: none"> - The entire front entry of the Arizona Heritage Center (AHC) in Tempe has been closed to the public since June 2025 due to falling rocks and mortar from its decaying facade and parapets. - None of the AHC HVAC units are considered operational, resulting in temperatures in excess of 90 degrees in what are supposed to be secure and environmentally-controlled archival and collections storage areas. This seriously imperils the preservation and future retention of Arizona's unique historical records. - Uplifting has caused splits and fractures in excess of 1-2" in the interior foundations and floors of the AHC, threatening the stability of the building and staff offices (above) on the second floor. - Many of the bricks in the courtyard of the AHC have uplifted, creating an uneven surface with elevation changes exceeding 1". This has resulted in two separate trip-related injuries by members of the public in FY25 alone. - Woodrot in the front porch of the Pioneer Museum in Flagstaff requires its total disassembly and rebuild in accordance with SHPO standards. Torn and ripped carpets in the lobby and exhibit galleries of the Arizona History Museum (AHM) in Tucson present trip hazards and a significant liability to the state. <p>The requested \$250,000 increase to annual appropriations would not resolve the agency's backlog of repairs and maintenance projects in any single fiscal year. However, each year with this additional funding is progress toward their total resolution and a truly preventative and regular schedule.</p> <p>To paraphrase comments made by both AHS and ADOA during the agency's FY26 and FY27 CIP submission meetings: the State needs to recognize that if something is not done now for these buildings, it may not soon have them to care for - or will have a lawsuit on its hands for injuries resulting from its willful negligence in their upkeep.</p>
Statutory Reference:	<ul style="list-style-type: none"> - A.R.S. 41-821.B - A.R.S. 41-823.B
Equipment to be Purchased (if applicable):	N/A – Due to the frequent emergency-response nature of the agency's current repair schedule, the prioritization to add new projects to the funding schedule has not been determined.
Classification of New Positions:	N/A
Annualization(s):	N/A

Funding Issue Narrative

Agency: Arizona Historical Society

Issue: 2 Repair & Maintenance

Alignment with Agency's Strategic Plan or Statutory Responsibilities:

By statute, the Arizona Historical Society may own and maintain property in the furtherance of its mission; additional statutes further assign the AHS to collect, preserve, and make accessible to the public items of historic value and to maintain suitable facilities for their care. Three of the agency's properties are historic sites with nationally-registered buildings on their grounds; they exist both as State facilities retaining artifacts and archival records, but also as artifacts themselves. The agency's two purpose-built facilities are the primary storehouses for the State's historic collections and archives, and require specialized environmental controls for their preservation.

The current funding allocated to AHS' properties and historic sites is insufficient to its needs. The agency requires additional support and has requested an increase to appropriations to defray those added costs from deferred maintenance and aging/historic buildings.

Impact on Historically Underserved, Marginalized, or Adversely Affected Groups:

Three of AHS' historic sites are operated by local non--profit organizations, two of which are historical societies operating the buildings as museums and another which provides positive and impactful programming to underserved children. The two purpose-built museum facilities, the Arizona History Museum in Tucson and the Arizona Heritage Center in Tempe, provide themed educational content and lessons to schools and families across their respective communities. Their public programming and exhibits work with their local communities to engage a diverse group of children and adults, while the agency's collections and archives curated within the Tempe and Tucson sites preserve their history. Additionally, both the AHM and AHC are registered participants in the Arizona Culture Pass program, which removes economic barriers to traditionally disadvantaged families to experience and benefit from the curated histories and historical resources of Arizona.

Continued disrepair of these buildings will reduce the public's accessibility, and the agency's role as host to explorations of the diversity of Arizona's peoples and their contribution to its shared history.

How has feedback been incorporated from groups directly impacted by proposal?:

Public feedback is routinely collected from visitors by the agency's Guest Experience staff at its museums' front desks, as well as its public-facing archivists in the agency's libraries & archives. Comments are supportive when new areas are opened up, and range from disappointed to annoyed when others are closed for extended periods for maintenance. Recently, there has been a significant rise in concerns and complaints issued by members of the public and other state agency personnel (e.g. SPO) over uneven and cracked flooring, falling rocks, etc.

The facilities staff of AHS are in support of additional funding to begin contracting for identified, but unfunded repairs.

Description of how this furthers the Governor's priorities:

In the Governor's FY26 draft Executive Budget, \$338,900 was proposed as Building Renewal funds to the Arizona Historical Society, in recognition of significant discrepancies and shortcomings in the agency's current facility maintenance funding efforts. The agency's requested \$250,000 increase is commensurate with that original proposal, but adjusted to instead reflect a more modest but recurring increase in lieu of a larger, one-time award.

Issue: 3 IT Subscriptions and Hardware

Funding Issue 2
Repair & Maintenance

Title in Detail Budget Book:

Operating Budget

Fund Source: General Fund

Proposal:

\$250,000 increase to “Operating Budget” annual appropriations (FY27-onward).

Description of issue:

The schedule for regular maintenance of the agency’s 3 facilities and 3 historic sites (totaling 11 structures) is inadequate against existing issues for repair. All sites suffer from previously-deferred maintenance, which compounds new issues that continue to emerge. All of its facilities and sites are at least 75 years in age, with the exception of the Arizona Heritage Center (Tempe) which has just passed its 30-year maintenance period without refresh.

AHS has submitted its most pressing needs in its CIP reports, current through to its recent FY27 submission. An increase to annual appropriations to defray these costs will have a positive impact on the State’s overall expenditures, reducing annual requests through the CIP process. Historic CIP requests and fulfillment rates demonstrate intermittent success in obtaining project-specific support; additional funding directly to AHS will ensure essential sites and systems are taken off a schedule of deferred maintenance - or otherwise continue to fail and go unaddressed.

CIP Building Renewal	FY23	FY24	FY25	FY26	FY27
Amount Requested	\$ 3,307,000	\$ 2,788,000	\$ 4,472,097	\$ 3,032,594	\$ 1,830,611
Amount Received	\$ 1,666,000	\$ 0	\$ 0	N/A	N/A

Funding Missing for Health & Safety Repairs	\$ 1,641,000	\$ 2,788,000	\$ 4,472,097	TBD	TBD
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The lack of fulfillment from the agency’s annual CIP requests has required AHS to spend above its own allocated budget for “Repair & Maintenance” year-over-year. These overruns reflect the **true** cost of simply maintaining the agency’s multitude of historical sites and modern facilities, without even speaking to longer-term upgrades and improvements. Costs are now increasing as more systems begin to fail and the required repairs compound in their severity and urgency.

Repair & Maintenance	FY23	FY24	FY25	FY26	FY27
Budgeted	\$ 190,260	\$ 250,000	\$ 279,000	\$ 279,000	\$ 550,000
Actual	\$ 288,782	\$ 390,403	\$ 423,417	N/A	N/A
Total	\$ 98,522	\$ 140,403	\$ 144,417	N/A	N/A

Alternatives considered:

In FY24 and FY25, AHS pursued funding options to defray agency costs to maintain and repair its facilities and sites through state and Federal grants, risk management claims (when appropriate), use of its restricted reserves, property transfers, and partnered cost-sharing. These included:

- SHPO Heritage Grant applications
- Transfer-out to City of Yuma of its 3 historic properties (Sanguinetti House, Mellon House, Molina Block)
- Facility lease operating agreements with tenants managing upkeep
- Draw-down from the agency’s HI2025 restricted “Facilities & Sites” subfund to manage one-time project costs
- Public partnerships to externally fund and manage facility repairs and improvements (e.g. Friends groups for ADA lifts, ADA railings, etc)
- Repeated requests for additional funding through the annual CIP process

Despite these efforts, the agency struggles with a portfolio of historic buildings whose accumulated costs for repairs exceed the agency's budgeted capacity to maintain them. AHS' current efforts and resources are often used in response to an immediate facilities incident, and not routine or preventative as desired.

Impact of not funding this year:

The current schedule of repairs will continue as planned, using the \$279,000 amount previously allocated in FY25 and anticipated in FY26. Unfortunately, the agency's anticipated funding schedule for "Repair and Maintenance" has been subject to over-spending in both FY24 and FY25. In FY24, the agency spent \$390,000 of its allocated \$250,000 (\$140,000 overage). In FY25, the agency spent \$423,000 of its \$279,000 (\$144,000 overage). This pattern reveals the TRUE costs of the agency at its barest requirements for operations, safety, and upkeep, and the significant gap in its funding reality to accomplish these statutory tasks. Moreover, due to this continued policy of deferred maintenance, the repairs costs are increasing each year - requiring an even greater investment by the State to correct.

This deferred maintenance backlog is significantly impacting not only the continuity of operations but now presents active threats to the safety and well-being of the agency's personnel, unique assets, and visiting members of the public. Examples of this include:

- The entire front entry of the Arizona Heritage Center (AHC) in Tempe has been closed to the public since June 2025 due to falling rocks and mortar from its decaying facade and parapets.
- None of the AHC HVAC units are considered operational, resulting in temperatures in excess of 90 degrees in what are supposed to be secure and environmentally-controlled archival and collections storage areas. This seriously imperils the preservation and future retention of Arizona's unique historical records.
- Uplifting has caused splits and fractures in excess of 1-2" in the interior foundations and floors of the AHC, threatening the stability of the building and staff offices (above) on the second floor.
- Many of the bricks in the courtyard of the AHC have uplifted, creating an uneven surface with elevation changes exceeding 1". This has resulted in two separate trip-related injuries by members of the public in FY25 alone.
- Woodrot in the front porch of the Pioneer Museum in Flagstaff requires its total disassembly and rebuild in accordance with SHPO standards.

- Torn and ripped carpets in the lobby and exhibit galleries of the Arizona History Museum (AHM) in Tucson present trip hazards and a significant liability to the state.

The requested \$250,000 increase to annual appropriations would not resolve the agency's backlog of repairs and maintenance projects in any single fiscal year. However, each year with this additional funding is progress toward their total resolution and a truly preventative and regular schedule.

To paraphrase comments made by both AHS and ADOA during the agency's FY26 and FY27 CIP submission meetings: the State needs to recognize that if something is not done now for these buildings, it may not soon have them to care for - or will have a lawsuit on its hands for injuries resulting from its willful negligence in their upkeep.

Statutory reference:

- A.R.S. 41-821.B
- A.R.S. 41-823.B

Equipment to be purchased (if applicable):

N/A – Due to the frequent emergency-response nature of the agency's current repair schedule, the prioritization to add new projects to the funding schedule has not been determined.

Classification of new positions:

N/A

Annualization(s):

N/A

Alignment with agency's strategic plan or statutory responsibilities:

By statute, the Arizona Historical Society may own and maintain property in the furtherance of its mission; additional statutes further assign the AHS to collect, preserve, and make accessible to the public items of historic value and to

maintain suitable facilities for their care. Three of the agency's properties are historic sites with nationally-registered buildings on their grounds; they exist both as State facilities retaining artifacts and archival records, but also as artifacts themselves. The agency's two purpose-built facilities are the primary storehouses for the State's historic collections and archives, and require specialized environmental controls for their preservation.

The current funding allocated to AHS' properties and historic sites is insufficient to its needs. The agency requires additional support and has requested an increase to appropriations to defray those added costs from deferred maintenance and aging/historic buildings.

Impact on historically underserved, marginalized, or adversely affected groups:

Three of AHS' historic sites are operated by local non--profit organizations, two of which are historical societies operating the buildings as museums and another which provides positive and impactful programming to underserved children. The two purpose-built museum facilities, the Arizona History Museum in Tucson and the Arizona Heritage Center in Tempe, provide themed educational content and lessons to schools and families across their respective communities. Their public programming and exhibits work with their local communities to engage a diverse group of children and adults, while the agency's collections and archives curated within the Tempe and Tucson sites preserve their history. Additionally, both the AHM and AHC are registered participants in the Arizona Culture Pass program, which removes economic barriers to traditionally disadvantaged families to experience and benefit from the curated histories and historical resources of Arizona.

Continued disrepair of these buildings will reduce the public's accessibility, and the agency's role as host to explorations of the diversity of Arizona's peoples and their contribution to its shared history.

How has feedback been incorporated from groups directly impacted by proposal:

Public feedback is routinely collected from visitors by the agency's Guest Experience staff at its museums' front desks, as well as its public-facing archivists in the agency's libraries & archives. Comments are supportive when new areas are opened up, and range from disappointed to annoyed when others are closed for extended periods for

maintenance. *Recently, there has been a significant rise in concerns and complaints issued by members of the public and other state agency personnel (e.g. SPO) over uneven and cracked flooring, falling rocks, etc.*

The facilities staff of AHS are in support of additional funding to begin contracting for identified, but unfunded repairs.

Description of how this furthers the Governor's priorities:

In the Governor's FY26 draft Executive Budget, \$338,900 was proposed as Building Renewal funds to the Arizona Historical Society, in recognition of significant discrepancies and shortcomings in the agency's current facility maintenance funding efforts. The agency's requested \$250,000 increase is commensurate with that original proposal, but adjusted to instead reflect a more modest but recurring increase in lieu of a larger, one-time award.

If requesting GF, why is it critical to continued operations?

The increasing severity of incidents requiring repair within the agency's facilities – worn air handler systems, roof failures, and cracked and shifting foundations to name a few – have resulted in the closures of the affected portions of those buildings to visitors, clients (event rentals), tenants, and staff. These closures negatively affect the agency's capacity to care for and make accessible to the public its artifacts and records, weaken the public's confidence and trust in the agency and State as a whole, and reduce the agency's capacity for annual revenue through the likes of facility rentals and on-site programs.

If requesting GF, why can't existing funding fully or partially meet the need?

For FY26, AHS has allocated \$279,000 in its annual budget toward Repair & Maintenance. This allocation was based around known, existing costs and previously-scheduled work for within the year but also tempered based on practical financial realities and limitations. The agency is requesting additional support to cover known and future repair needs as they will arise above those projects currently within its capacity to fund, as its historic financial data for the last two years (FY24-25) reveals that the **true** cost for AHS facilities upkeep is in excess of \$500,000 per annum. An increase of this sort, without a corresponding increase in annual appropriations, is not feasible given the limited operational budget of the agency.

If requesting GF, why can't other funds fully or partially meet the need?

While AHS does maintain a restricted reserve for its facilities & sites, the current request would deplete nearly half of the total subfund, which stands at less than \$400,000 and has historically already been subject to draw-down in FY24 and FY25. Any further draw-down should be project-specific and not approached or considered as a long-term or sustainable solution.

Funding Issue Narrative

Agency: Arizona Historical Society

Issue: 3 IT Subscriptions and Hardware

Description of Issue: The Arizona Historical Society maintains a number of unique software subscriptions, operating on proprietary licenses, to support its industry-specific work in the fields of collections and archival management. Both the current software suites employed by the agency – as well as the hardware systems on which those softwares operate – are insufficient to meet the current and future operational needs of the agency. This insufficiency pertains to both the quantity (database sizes) and quality (file format, sizes, etc) of its managed digital records. To make the best of the tools presently available, many of the agency's operating solutions are ad-hoc and precarious at best. Simple Excel spreadsheets and PDF images, grafted onto a website's back-end, operate in lieu of any dedicated archival database. This has resulted in near-monthly outages of the agency's public website and a general failure to properly add and process new collections, utterly precludes certain types of digital-born archival materials, and limits access to the history of Arizona by its people. Beyond software, much of the essential hardware that is both back-end and revenue-generating (forward-facing) is failing. Clients and contracts are falling off relative to the quality and timeliness of the agency's capacity to meet its archival commitments. Scanner tracks are broken, resulting in the suspension of the agency's high-resolution scanning services. The agency's micrographics center – the only such service still offered by any state agency in fulfillment of state statutes regarding records retention has been closed due to failed technology – for the better part of a year. Existing staff computers are technologically incompatible with the software needed to maintain the agency's digital archives database of over 12 million materials.

The acquisition of new supporting software (with annual subscriptions) and refresh on existing IT hardware systems is required and overdue in order to meet the agency's statutory obligations.

Proposal: \$50,000 increase to "Operating Budget" annual appropriations (FY27-onward). These funds would facilitate the purchase and implementation of new and/or replacement technology (software and supporting hardware) necessary for agency staff to complete their essential, statutory duties.

Alternatives Considered: The software suites currently utilized by the agency – and the new software recommended for appropriations – represent a restricted and limited vendor pool of industry-specific services. The agency conducts regular reviews of comparable programs beyond those already under contract, to ensure fiscal responsibility in their procurement assignment, but has found the differences in pricing with alternative competitors to be negligible - especially when considering the added costs (time, fees, and labor) required to migrate or shift between different systems. For the hardware proposed: while there exists some flexibility over vendors and pricing, the technical requirements for each are specific for based on function and use and likewise inspire a comparatively narrow vendor pool. Due to the significant challenges and obstacles these gaps in technology – software and hardware – represent to the daily functions of the agency, there are no practical substitutes or alternatives to implementing the new technology as proposed. The current, ad-hoc solutions are only temporary and incomplete solutions and set the agency up to fail in its revenue generation goals and statutory obligations.

Impact of Not Funding This Year: A failure to secure additional funding to resolve the above-described technology issues (software and hardware) would have several significant impacts on the agency and its operations. Specifically:

1. Failure to comply with statute
2. AHS is the only agency offering microfilm processing on-contract to other state agencies. Outside inter-agency agreements, there are only a handful of operating microfilm businesses remaining in the private sector.
2. Loss of revenue - failure to repair the agency's micrographics (microfilm) processing center would result in tens of thousands in lost annual revenue.
3. Failure to comply with statute - the agency has an obligation to acquire and properly preserve, catalog, and make available its collections and archival materials. Failure to upgrade and augment existing software and hardware systems results in system outages, inadequate cataloging, and the total incompatibility of existing systems for digital-born acquisitions (e.g. 3D architectural archives, media, oral histories).
4. Loss of revenue - failure to replace the agency's failing scanners will result in lost annual revenue from public digitization orders.
5. Security risk - Preservica offers user security features not currently available to the agency in its existing software suites, such as permissions, access controls, and encryption, to safeguard digital assets from unauthorized access, modification, or loss.

Without these vital technologies, the agency's archives cannot evolve alongside technology, cannot collect digital records, and will fall behind other repositories and national standards.

Statutory Reference: ARS § 39-101
ARS § 41-151.16
A.R.S. 41-823.A.1-4
A.R.S. 41-823.B

Funding Issue Narrative

Agency:		Arizona Historical Society
Issue:	3	IT Subscriptions and Hardware
Equipment to be Purchased (if applicable):	<p>This would obligate not only acquisition of new software subscriptions, but the purchase of:</p> <ul style="list-style-type: none"> - 6 new laptops and desktops for archival and collections management - 2 new large flatbed archival scanners 	
Classification of New Positions:	N/A	
Annualization(s):	N/A	
Alignment with Agency's Strategic Plan or Statutory Responsibilities:	<p>Per its governing statute, A.R.S. §§41-823, the Arizona Historical Society is charged with the preservation and public accessibility of its historical collections and archives to the people of Arizona and its visitors. Two strategic goals of the agency are to make AHS the most trusted authority on Arizona history, and to enhance its capacity to collect, preserve, interpret, and disseminate Arizona's history. The introduction and implementation of these proposed, new digital systems – with their annual subscription – and their supporting hardware will elevate and enhance the agency's ability to process, manage, and digitally preserve, catalog, and make accessible its collections and archives.</p>	
Impact on Historically Underserved, Marginalized, or Adversely Affected Groups:	<p>By making archival materials more accessible, the agency can effectively tell and make available the stories and histories of Arizona's historically underserved, economically limited, or geographically marginalized groups. With a suitable suite of archival and collections software (supported by new hardware) to publish and support research, historians and researchers are able to produce more inclusive scholarship that recognizes the experiences of these groups, while additionally improving statewide access to those same peoples in a modern setting. This fosters a more comprehensive understanding of history, wherein historically underserved schools and student groups can gain increased access to the experiences and histories of others across the state. Museums, documentaries, exhibitions, and educational programs drawn from archival sources can elevate these histories to wider audiences, promoting understanding and empathy. Examples of this include:</p> <ul style="list-style-type: none"> -Digitization and promotion of Japanese-American history archives (specifically Internment) in Arizona during WWII, in alignment with SB-1301 submitted in the 2025 Legislative session by Sen. Kavanagh and Fernandez. - Records access in support of the Tucson 250th anniversary -Records access in support of the America 250th celebration -Records access in support of the 100th anniversary of Route 66. -Statewide archival access to rural schools and students, in support of the Arizona National History Day competition. 	
How has feedback been incorporated from groups directly impacted by proposal?:	<p>The agency's archivists receive recurrent inquiries and comments by researchers, students, and other members of the public concerning the availability and accessibility of its archival collections. The nature of this feedback exists within a range that identifies issues concerning ease of access, breadth and depth of posted (online) resources, and consistency of the up-time of the agency's digital collections and archives. The failure of the agency to adequately address the operational deficiencies presented by these software and hardware shortcomings and failings has resulted in significant displeasure and frustration among staff. This has long-term implications against agency moral and staff retention.</p> <p>Recent feedback from long-time and repeat patrons of the agency's high-resolution scanning services have expressed their dissatisfaction with the current quality of recent scans performed by the agency. The degradation in quality is a result of the broken and failing tracks on the agency's high-resolution scanners. The agency has had to temporarily suspend its microfilm processing services, which has negatively impacted the records retention efforts of other State agencies.</p>	

Funding Issue 3

IT Subscriptions and Hardware

Title in Detail Budget Book:

Operating Budget

Fund Source: General Fund

Proposal:

\$50,000 increase to “Operating Budget” annual appropriations (FY27-onward).

These funds would facilitate the purchase and implementation of new and/or replacement technology (software and supporting hardware) necessary for agency staff to complete their essential, statutory duties.

Description of issue:

The Arizona Historical Society maintains a number of unique software subscriptions, operating on proprietary licenses, to support its industry-specific work in the fields of collections and archival management. Both the current software suites employed by the agency – as well as the hardware systems on which those softwares operate – are insufficient to meet the current and future operational needs of the agency. This insufficiency pertains to both the quantity (database sizes) and quality (file format, sizes, etc) of its managed digital records. To make the best of the tools presently available, many of the agency’s operating solutions are ad-hoc and precarious at best. Simple Excel spreadsheets and PDF images, grafted onto a website’s back-end, operate in lieu of any dedicated archival database. This has resulted in near-monthly outages of the agency’s public website and a general failure to properly add and process new collections, utterly precludes certain types of digital-born archival materials, and limits access to the history of Arizona by its people.

Beyond software, much of the essential hardware that is both back-end and revenue-generating (forward-facing) is failing. Clients and contracts are falling off relative to the quality and timeliness of the agency’s capacity to meet its archival commitments. Scanner tracks are broken, resulting in the suspension of the agency’s high-resolution

scanning services. The agency's micrographics center – the only such service still offered by any state agency in fulfillment of state statutes regarding records retention¹ – has been closed due to failed technology – for the better part of a year. Existing staff computers are technologically incompatible with the software needed to maintain the agency's digital archives database of over 12 million materials.

The acquisition of new supporting software (with annual subscriptions) and refresh on existing IT hardware systems is required and overdue in order to meet the agency's statutory obligations.

	Per Unit Cost	Quantity	Total	Frequency
Hardware: Scanners	\$5,000	2	\$10,000	One-time
Hardware: Laptops/Desktops	\$1,250	6	\$7,500	One-time
Software: Preservica	\$19,670	1	\$19,700	Recurring: Annual
Software: PastPerfect	\$1,600	1	\$1,600	Recurring: Annual
Maintenance: Micrographics	\$6,700	1	\$6,700	Recurring: Annual
Repair: Micrographics	\$450	1	\$4,500	One-time
Totals			\$50,000	

¹ ARS § 39-101 – <https://www.azleg.gov/ars/39/00101.htm>

ARS § 41-151.16 – <https://law.justia.com/codes/arizona/2015/title-41/section-41-151.16>

Alternatives considered:

The software suites currently utilized by the agency – and the new software recommended for appropriations – represent a restricted and limited vendor pool of industry-specific services. The agency conducts regular reviews of comparable programs beyond those already under contract, to ensure fiscal responsibility in their procurement assignment, but has found the differences in pricing with alternative competitors to be negligible - especially when considering the added costs (time, fees, and labor) required to migrate or shift between different systems. For the hardware proposed: while there exists some flexibility over vendors and pricing, the technical requirements for each are specific for based on function and use and likewise inspire a comparatively narrow vendor pool.

Due to the significant challenges and obstacles these gaps in technology – software and hardware – represent to the daily functions of the agency, there are no practical substitutes or alternatives to implementing the new technology as proposed. The current, ad-hoc solutions are only temporary and incomplete solutions and set the agency up to fail in its revenue generation goals and statutory obligations.

Impact of not funding this year:

A failure to secure additional funding to resolve the above-described technology issues (software and hardware) would have several significant impacts on the agency and its operations. Specifically:

1. Failure to comply with statute² - AHS is the only agency offering microfilm processing on-contract to other state agencies. Outside inter-agency agreements, there are only a handful of operating microfilm businesses remaining in the private sector.
2. Loss of revenue - failure to repair the agency's micrographics (microfilm) processing center would result in tens of thousands in lost annual revenue.
3. Failure to comply with statute³ - the agency has an obligation to acquire and properly preserve, catalog, and make available its collections and archival materials. Failure to upgrade and augment existing software and hardware systems results in system outages, inadequate cataloging, and the total incompatibility of existing systems for digital-born acquisitions (e.g. 3D architectural archives, media, oral histories).

² ARS § 39-101, ARS § 41-151.16

³ ARS § 41-823.A.1-4, ARS § 41-823.B

4. Loss of revenue - failure to replace the agency's failing scanners will result in lost annual revenue from public digitization orders.
5. Security risk - Preservica offers user security features not currently available to the agency in its existing software suites, such as permissions, access controls, and encryption, to safeguard digital assets from unauthorized access, modification, or loss.

Without these vital technologies, the agency's archives cannot evolve alongside technology, cannot collect digital records, and **will** fall behind other repositories and national standards.

Statutory reference:

- ARS § 39-101
- ARS § 41-151.16
- A.R.S. 41-823.A.1-4
- A.R.S. 41-823.B

Equipment to be purchased (if applicable):

This would obligate not only acquisition of new software subscriptions, but the purchase of:

- 6 new laptops and desktops for archival and collections management
- 2 new large flatbed archival scanners

Classification of new positions:

N/A

Annualization(s):

N/A

Alignment with agency's strategic plan or statutory responsibilities:

Per its governing statute, A.R.S. §§41-823, the Arizona Historical Society is charged with the preservation and public accessibility of its historical collections and archives to the people of Arizona and its visitors. Two strategic goals of the agency are to make AHS the most trusted authority on Arizona history, and to enhance its capacity to collect, preserve, interpret, and disseminate Arizona's history. The introduction and implementation of these proposed, new digital systems – with their annual subscription – and their supporting hardware will elevate and enhance the agency's ability to process, manage, and digitally preserve, catalog, and make accessible its collections and archives.⁴

Impact on historically underserved, marginalized, or adversely affected groups:

By making archival materials more accessible, the agency can effectively tell and make available the stories and histories of Arizona's historically underserved, economically limited, or geographically marginalized groups.

With a suitable suite of archival and collections software (supported by new hardware) to publish and support research, historians and researchers are able to produce more inclusive scholarship that recognizes the experiences of these groups, while additionally improving statewide access to those same peoples in a modern setting. This fosters a more comprehensive understanding of history, wherein historically underserved schools and student groups can gain increased access to the experiences and histories of others across the state. Museums, documentaries, exhibitions, and educational programs drawn from archival sources can elevate these histories to wider audiences, promoting understanding and empathy. Examples of this include:

- Digitization and promotion of Japanese-American history archives (specifically Internment) in Arizona during WWII, in alignment with SB-1301 submitted in the 2025 Legislative session by Sen. Kavanagh and Fernandez.
- Records access in support of the Tucson 250th anniversary
- Records access in support of the America 250th celebration
- Records access in support of the 100th anniversary of Route 66.

⁴ These describe over 85,000 objects and 12 million archival materials, including documents, photos, films, oral histories, maps, architectural drawings, etc.

- Statewide archival access to rural schools and students, in support of the Arizona National History Day competition.

How has feedback been incorporated from groups directly impacted by proposal:

The agency's archivists receive recurrent inquiries and comments by researchers, students, and other members of the public concerning the availability and accessibility of its archival collections. The nature of this feedback exists within a range that identifies issues concerning ease of access, breadth and depth of posted (online) resources, and consistency of the up-time of the agency's digital collections and archives. The failure of the agency to adequately address the operational deficiencies presented by these software and hardware shortcomings and failings has resulted in significant displeasure and frustration among staff. This has long-term implications against agency moral and staff retention.

Recent feedback from long-time and repeat patrons of the agency's high-resolution scanning services have expressed their dissatisfaction with the current quality of recent scans performed by the agency. The degradation in quality is a result of the broken and failing tracks on the agency's high-resolution scanners. The agency has had to temporarily suspend its microfilm processing services, which has negatively impacted the records retention efforts of other State agencies.

Description of how this furthers the Governor's priorities:

To effectively lead, a firm understanding of the past is essential. The agency is tasked with preserving Arizona's history for the benefit and betterment of its people. This preservation begins and is sustained through careful and deliberate stewardship. That standard of care is maintained through technology. Software manages the agency's catalog - both internal and public-facing - and, increasingly, preserves digital-born archives representing the photos, videos, and oral histories of Arizona in the late 20th and early 21st centuries. These archives serve the public and satisfy their access to the records and materials of the state's history. Technology - digital catalogs, online hosting, scanners and processing machines - is essential to fulfilling this obligation and promise.



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The purchase of these new and replacement technologies will expand the agency's capacity to effectively catalog, manage, accept, and make increasingly available to the public its archive of over 12 million materials, including documents, photos, films, oral histories, maps, and architectural drawings. These archives serve traditional students and schools through the likes of its Education and Field Trip programs, its statewide National History Day contest (which results in Arizona students competing at a national level with the top students across the United States in Washington, D.C.), as well as through partnerships for on-site student research with the State's universities.

Without the support of new state appropriations, the agency's existing deficiencies in its supporting technology will hurt Arizona's students, researchers, families, and leaders - limiting and effectively cutting them off from their shared past.

If requesting GF, why is it critical to continued operations?

At this moment, the agency's Library & Archives department is at a logjam in its ability to effectively manage its materials and their records. The current mechanism through which the agency manages these records is underpowered to perform the tasks demanded of it from a collection of AHS' size. Additional software and hardware are required to both support the existing systems infrastructure through which the agency currently manages its archival content, and to facilitate the acquisition of new records and their accessibility through online media.

If requesting GF, why can't existing funding fully or partially meet the need?

AHS does not have sufficient funds within its annual budget to accommodate either the one-time or recurring annual payments that this project would obligate. Significant budgetary changes to the agency – updates to revenue goals and reductions in FY24 and FY25, including the closure of one facility and divestiture of three properties – were already implemented to achieve a balanced budget for FY26; an increase of this sort is not possible at this time given those changes already made.

If requesting GF, why can't other funds fully or partially meet the need?

AHS has restricted reserves which it has committed to apply in support of this project. The total cost to repair the agency's micrographics center exceeds the funds requested. The agency continues to absorb into its non-appropriated expenditures (Enterprise funds and Statewide Donations) the costs of other, current software suites

and any annual rate changes, and is elsewhere planning to implement additional (complimentary) software beyond Preservica to support its daily operations.⁵

Enterprise revenue goals for FY26 and FY27 are already budgeted to accommodate known expenses within both years, and still introduce underfunded items within the allocations of both. Any diversion or use of annual operations funds – already-appropriated or Enterprise – would detract from another, existing funding item.

⁵ ContentDM, ArchivesSpace



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United States

Created Date 4/15/2025
Expiration Date 6/30/2025
Quote Number 00000162

Product	Quantity	Line Item Description	Payment Type	Sales Price	Total Price
Professional	1.00	Professional edition with implementation & support - Includes 1TB of S3 Hot Storage	Annual Subscription	USD 16,770.00	USD 16,770.00
Storage - AWS - Glacier flexible (TBs)	5.00	1TB Glacier Cool Storage	Annual Subscription	USD 580.00	USD 2,900.00

Pricing Excluding Tax

Optional Service USD 0.00
Fee Total

Annual Subscription USD 19,670.00
Fee Total
One Time Fee Total USD 0.00

ARIZONA HISTORICAL SOCIETY

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Part List

Overview Prices By Merchant

<https://pcpartpicker.com/list/XHzb9C>

Markup: T BB

History Save As Edit This Part List

Compatibility: See details below.

Estimated Wattage: 353W

Component	Selection	Base	Promo	Shipping	Tax	Availability	Price	Where	
CPU	AMD Ryzen 7 9700X 3.8 GHz 8-Core Processor	Base \$303.63	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$303.63	Where amazon.com	
CPU Cooler	Noctua NH-L9A-AM5 33.84 CFM CPU Cooler	Base \$49.95	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$49.95	Where amazon.com	
Motherboard	Asus PRIME B650-PLUS WIFI ATX AM5 Motherboard	Base \$159.99	Promo	Shipping ✓Prime	Tax	Availability Available soon	Price \$159.99	Where amazon.com	
Memory	Crucial Pro 64 GB (2 x 32 GB) DDR5-5600 CL46 Memory	Base \$139.99	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$139.99	Where amazon.com	
Storage	Samsung 990 Pro 2 TB M.2-2280 PCIe 4.0 X4 NVME Solid State Drive	Base \$149.99	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$149.99	Where amazon.com	
Video Card	Gigabyte WINDFORCE OC GeForce RTX 5060 8 GB Video Card	Base \$299.99	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$299.99	Where amazon.com	
Case	Fractal Design Focus G ATX Mid Tower Case	Base \$59.99	Promo	Shipping FREE	Tax	Availability In stock	Price \$59.99	Where 	
Power Supply	MSI MAG A650BN 650 W 80+ Bronze Certified ATX Power Supply	Base \$64.98	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$64.98	Where amazon.com	
Case Fan	Thermalright TL-C12C X3 66.17 CFM 120 mm Fans 3-Pack	Base \$11.99	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$11.99	Where amazon.com	

Total: **\$1240.50**

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Funding Issue Narrative

Agency: Arizona Historical Society

Issue: 3 IT Subscriptions and Hardware

Description of how this furthers the Governor's priorities:

To effectively lead, a firm understanding of the past is essential. The agency is tasked with preserving Arizona's history for the benefit and betterment of its people. This preservation begins and is sustained through careful and deliberate stewardship. That standard of care is maintained through technology. Software manages the agency's catalog - both internal and public-facing - and, increasingly, preserves digital-born archives representing the photos, videos, and oral histories of Arizona in the late 20th and early 21st centuries. These archives serve the public and satisfy their access to the records and materials of the state's history. Technology - digital catalogs, online hosting, scanners and processing machines - is essential to fulfilling this obligation and promise.

The purchase of these new and replacement technologies will expand the agency's capacity to effectively catalog, manage, accept, and make increasingly available to the public its archive of over 12 million materials, including documents, photos, films, oral histories, maps, and architectural drawings. These archives serve traditional students and schools through the likes of its Education and Field Trip programs, its statewide National History Day contest (which results in Arizona students competing at a national level with the top students across the United States in Washington, D.C.), as well as through partnerships for on-site student research with the State's universities.

Without the support of new state appropriations, the agency's existing deficiencies in its supporting technology will hurt Arizona's students, researchers, families, and leaders - limiting and effectively cutting them off from their shared past.

Issue: 4 Certified Historical Institutions (CHI) program

Description of Issue:

Insufficient funding to meet needs for an essential public program. The Arizona Historical Society operates the Certified Historical Institution (CHI) program, which supports historical museums and organizations across the state of Arizona in their efforts to collect, preserve and share Arizona's rich history. This program is open to brick-and-mortar facilities, as well as historical organizations that fulfill certain requirements related to the preservation and sharing of Arizona history. AHS provides support to CHIs with access to industry professionals, statewide networking and educational materials. CHIs are eligible for grants up to \$2,000 per year. Due to fiscal realities realized and addressed across the last several fiscal years, AHS has an overall reduced profile of physical locations to manage and make accessible the State's historical archives and collections. The CHI program is an effective, fiscally-responsible solution that supports local communities in their individual care and exhibition of Arizona's regional histories - extending the agency's influence and expertise beyond its physical sites.

The AHS CHI program currently has 67 CHI members across the state. This fiscal year, during its annual grant season, the CHI program received 34 applications requesting a total of \$55,840 in individual grants of no more than \$2,000 each. While small, each of these requests was significant and would have been impactful. The number of grant applications has been steadily growing to match the membership of the CHI program itself.

Due to the structure of the Field Services & Grants appropriation (to include a 0.5 FTE position to support it), only \$34,000 could be awarded in grants. Historically, the largest total grant award in a single year has never exceeded \$40,000. These limitations are exacerbated by the recent cuts in Federal grant funding to Arizona, which threaten the sustainability of many of Arizona's smallest museums. Given the renewed focus and anticipated future growth of the AHS CHI program (as AHS reduces its physical presence elsewhere), AHS anticipates new membership within the CHI program and a continued increase in the number of grant applications received annually. This need and projected increase is further amplified by the reductions and outright suspension of Federal and local grant giving as a result of changes at the Federal level. The current appropriation is not sufficient to support statewide demand and interest in this agency program.

Proposal:

\$40,000 increase to "Field Services & Grants" annual appropriations (FY27-onward). These funds would serve as a dedicated passthrough for the agency's Certified Historical Institutions (CHI) grant program. This program is a dedicated Special Line Item in the agency's annual appropriations and provides direct support to deserving historical organizations and museums across the state and in fulfillment of AHS' strategic goals. Internal allocation and spending of this fund is currently split between CHI grants and the costs of 0.5 FTE for a single managing staff member. The award of an additional \$40,000 would be applied solely to the grant-giving operations of the CHI program. This would effectively double the agency's current grant-giving capacity to an amount commensurate with the stated needs of participating CHI museums, as reflected in the number of grant applications received annually.

Funding Issue Narrative

Agency:		Arizona Historical Society
Issue:	4	Certified Historical Institutions (CHI) program
Alternatives Considered:	<p>The State Board of the AHS' Outreach Committee is currently exploring new means through which to increase funding for this program. A lobbying effort was organized at the end of the 2025 Legislative session, but was implemented too late to be ultimately successful. This will resume in greater force in FY26, focusing on bottom-up advocacy by the CHIs themselves and local supporters to their respective elected officials, with the goal of generating strong legislative and public support for the agency's FY27 budget request.</p>	
Impact of Not Funding This Year:	<p>If the proposed increase is not approved, the CHI grant program will continue to issue awards within its current funding limits but against a growing number of requests. The impact will be to the CHI applicants themselves, as the agency and its review committee has to further restrict the number of awards issued or issue partial awards but at diminishing returns.</p> <p>Without additional funding, this directly affects and limits the operational capacity of Arizona's nonprofit regional museums. In 2017, Arizona had 600+ museums, with a GVA of \$935m; post-COVID, Arizona has ~350 museums with a GVA of \$545m. After the events of 2020, nearly half of Arizona's museums (250) closed permanently, resulting in a total GVA loss of nearly \$390 million. Facing funding cuts from the Fed. (and increased competition for local/state funds), a similar contraction may be anticipated again across Arizona.</p> <p>Such closures will result in the creation of orphaned collections and archives, which will further create a cascade effect as surviving institutions struggle to absorb these abandoned historical materials.</p>	
Statutory Reference:	N/A	
Equipment to be Purchased (if applicable):	N/A	
Classification of New Positions:	N/A	
Annualization(s):	N/A	
Alignment with Agency's Strategic Plan or Statutory Responsibilities:	<p>An expansion of funding for the AHS CHI program (Field Services & Grants) would support four of the Arizona Historical Society's strategic goals:</p> <ol style="list-style-type: none">1. Make AHS the most trusted source on Arizona history,2. Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history,3. Develop experiences that are meaningful and relevant to today's audiences, and4. Establish AHS as a strong, recognizable brand. <p>The AHS CHI program is growing, and demonstrates a need by the State's many community historical societies and museums. It is a need for expertise and guidance, and small – but significant – financial support. An increase to the CHI grant program's appropriation would directly support local history organizations in their own preservation and exhibition of artifacts and records. This local elevation supports AHS' own efforts, allowing the agency to otherwise avoid a statewide shortage of collections/archival storage locations whilst elevating the role and impact of the Arizona Historical Society as the leading history organization across Arizona.</p>	
Impact on Historically Underserved, Marginalized, or Adversely Affected Groups:	<p>The AHS CHI program is a statewide program; although several CHIs are located within major urban areas, many are located in and serve the State's rural communities, while others celebrate and preserve the histories of underrepresented and overlooked peoples and groups. Notable CHIs include Los Descendientes Del Presidio De Tucson, the Bisbee Mining & Historical Society, Cave Creek Museum, the Arcosanti/Cosanti Foundation, Fort Tuthill Military Museum, the Verde Valley Archaeology Center and Museum, and countless County and local Historical Societies.</p>	
How has feedback been incorporated from groups directly impacted by proposal?:	<p>The steady increase in CHI grant applications, as well as total CHI membership, is indicative of a growing realization of need within the State's historical communities. Despite this, AHS could only fulfill 50% of all requests for its FY25 grant cycle. Next year, it anticipates further reductions in impact. Professional guidance and financial support is essential to their continued and future successes. Support is strong among the membership for this increase. The State Board of AHS' Outreach Committee fully supports any solution to increase the funds available to the CHI grant program.</p>	

Funding Issue 4

Certified Historical Institutions (CHI) program

Title in Detail Budget Book:

Field Services & Grants

Fund Source: General Fund

Proposal:

\$40,000 increase to “Field Services & Grants” annual appropriations (FY27-onward).

These funds would serve as a dedicated passthrough for the agency’s Certified Historical Institutions (CHI) grant program. This program is a dedicated Special Line Item in the agency’s annual appropriations and provides direct support to deserving historical organizations and museums across the state and in fulfillment of AHS’ strategic goals. Internal allocation and spending of this fund is currently split between CHI grants and the costs of 0.5 FTE for a single managing staff member. The award of an additional \$40,000 would be applied solely to the grant-giving operations of the CHI program. This would effectively double the agency’s current grant-giving capacity to an amount commensurate with the stated needs of participating CHI museums, as reflected in the number of grant applications received annually.

Description of issue:

Insufficient funding to meet needs for an essential public program.

The Arizona Historical Society operates the Certified Historical Institution (CHI) program, which supports historical museums and organizations across the state of Arizona in their efforts to collect, preserve and share Arizona’s rich history. This program is open to brick-and-mortar facilities, as well as historical organizations that fulfill certain requirements related to the preservation and sharing of Arizona history. AHS provides support to CHIs with access to industry professionals, statewide networking and educational materials. CHIs are eligible for grants up to \$2,000 per year. Due to fiscal realities realized and addressed across the last several fiscal years, AHS has an overall reduced

profile of physical locations to manage and make accessible the State’s historical archives and collections. The CHI program is an effective, fiscally-responsible solution that supports local communities in their individual care and exhibition of Arizona’s regional histories – extending the agency’s influence and expertise beyond its physical sites.

The AHS CHI program currently has 67 CHI members across the state. This fiscal year, during its annual grant season, the CHI program received 34 applications requesting a total of \$55,840 in individual grants of no more than \$2,000 each. While small, each of these requests was significant and would have been impactful. The number of grant applications has been steadily growing to match the membership of the CHI program itself.

Due to the structure of the Field Services & Grants appropriation (to include a 0.5 FTE position to support it), only \$34,000 could be awarded in grants. Historically, the largest total grant award in a single year has never exceeded \$40,000. These limitations are exacerbated by the recent cuts in Federal grant funding to Arizona, which threaten the sustainability of many of Arizona’s smallest museums.

Given the renewed focus and anticipated future growth of the AHS CHI program (as AHS reduces its physical presence elsewhere), AHS anticipates new membership within the CHI program and a continued increase in the number of grant applications received annually. This need and projected increase is further amplified by the reductions and outright suspension of Federal and local grant giving as a result of changes at the Federal level.¹ The current appropriation is not sufficient to support statewide demand and interest in this agency program.

	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026
Total # CHIs	59	57	59	62	68	67
Total Grant Applications	36	39	23	33	36	34
Total \$ Grants Requested	\$61,934.82	\$45,880.00	\$39,128.00	\$58,183.00	\$63,627.00	\$55,840.00

¹ FY25 cuts by the Federal government to IMLS, NEH, and NEA have resulted in **\$8.2m** in annual grants cancelled to Arizona. This has resulted in down-line impacts to local and regional grant givers; the Arizona Humanities has indefinitely suspended all grant-giving activities.



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Applications Funded	27	24	23	23	31	29
Total \$ Grants awarded	\$35,434.82	\$38,000.00	\$39,128.00	\$32,893.00	\$33,999.00	\$34,000.00

Alternatives considered:

The State Board of the AHS' Outreach Committee is currently exploring new means through which to increase funding for this program. A lobbying effort was organized at the end of the 2025 Legislative session, but was implemented too late to be ultimately successful. This will resume in greater force in FY26, focusing on bottom-up advocacy by the CHIs themselves and local supporters to their respective elected officials, with the goal of generating strong legislative and public support for the agency's FY27 budget request.

Impact of not funding this year:

If the proposed increase is not approved, the CHI grant program will continue to issue awards within its current funding limits but against a growing number of requests. The impact will be to the CHI applicants themselves, as the agency and its review committee has to further restrict the number of awards issued or issue partial awards but at diminishing returns.

Without additional funding, this directly affects and limits the operational capacity of Arizona's nonprofit regional museums. In 2017, Arizona had 600+ museums, with a GVA of **\$935m**; post-COVID, Arizona has ~350 museums with a GVA of **\$545m**. After the events of 2020, nearly half of Arizona's museums (250) closed permanently, resulting in a total GVA loss of nearly **\$390 million**. Facing funding cuts from the Fed. (and increased competition for local/state funds), a similar contraction may be anticipated again across Arizona.

Such closures will result in the creation of orphaned collections and archives, which will further create a cascade effect as surviving institutions struggle to absorb these abandoned historical materials.

Statutory reference:

N/A

Equipment to be purchased (if applicable):

N/A

Classification of new positions:

N/A

Annualization(s):

N/A

Alignment with agency's strategic plan or statutory responsibilities:

An expansion of funding for the AHS CHI program (Field Services & Grants) would support four of the Arizona Historical Society's strategic goals:

1. Make AHS the most trusted source on Arizona history,
2. Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history,
3. Develop experiences that are meaningful and relevant to today's audiences, and
4. Establish AHS as a strong, recognizable brand.

The AHS CHI program is growing, and demonstrates a need by the State's many community historical societies and museums. It is a need for expertise and guidance, and small – but significant – financial support. An increase to the CHI grant program's appropriation would directly support local history organizations in their own preservation and exhibition of artifacts and records. This local elevation supports AHS' own efforts, allowing the agency to otherwise avoid a statewide shortage of collections/archival storage locations whilst elevating the role and impact of the Arizona Historical Society as the leading history organization across Arizona.

Impact on historically underserved, marginalized, or adversely affected groups:

The AHS CHI program is a statewide program; although several CHIs are located within major urban areas, many are located in and serve the State's rural communities, while others celebrate and preserve the histories of underrepresented and overlooked peoples and groups. Notable CHIs include Los Descendientes Del Presidio De Tucson, the Bisbee Mining & Historical Society, Cave Creek Museum, the Arcosanti/Cosanti Foundation, Fort Tuthill Military Museum, the Verde Valley Archaeology Center and Museum, and countless County and local Historical Societies.

How has feedback been incorporated from groups directly impacted by proposal:

The steady increase in CHI grant applications, as well as total CHI membership, is indicative of a growing realization of need within the State's historical communities. Despite this, AHS could only fulfill 50% of all requests for its FY25 grant cycle. Next year, it anticipates further reductions in impact. Professional guidance and financial support is essential to their continued and future successes. Support is strong among the membership for this increase.

The State Board of AHS' Outreach Committee fully supports any solution to increase the funds available to the CHI grant program.

Description of how this furthers the Governor's priorities:

The CHI program provides direct support by the State to cultural and historical organizations in communities across Arizona. Museums are a recognized contributor to local economies and further tourism efforts, while providing essential educational opportunities to nearby students and schools. However, many of these organizations are volunteer-run and operate with minimal budgets. More than one-third of all Arizona museums closed permanently since 2020. Those that remain exist on the fringe; support by the Governor and the Legislature on this initiative provides that direct support and ensures the continuation of these vital local, economic and social resources.

The agency's CHI program and the requested increase to its funding provide an easy, cost-effective solution that minimizes the State's investment while ensuring the continued success and growth of Arizona's history-based tourism and education sectors.

If requesting GF, why is it critical to continued operations?

Due to the reduced scope of AHS' programs and physical presence statewide, to remain relevant and impactful toward its mission the agency must direct its resources through its statewide services and support. Leveraging the CHI program to better develop and lead local, private historical organizations is an efficient use of the agency's limited budget that fulfills the majority of its Strategic Plan goals.

If requesting GF, why can't existing funding fully or partially meet the need?

AHS does not have sufficient revenue capacity within its annual budget (either through HI2900 Enterprise or HI2025 Donations) to accommodate an increase of this nature. Significant budgetary changes to the agency – updates to revenue goals and reductions in FY24 and FY25, including the closure of one facility and divestiture of three properties – were already implemented to achieve a balanced budget for FY26; an increase of this sort is not possible at this time given those changes already made.

If requesting GF, why can't other funds fully or partially meet the need?

The CHI program has no direct revenue-generating capacity or program at this time; it is funded solely through GF appropriations (Field Services & Grants). Participating museums in the CHI program are required to maintain an active, general membership with the agency (minimum \$50 annually). The agency is currently exploring the potential revenue gains and programmatic and member losses of implementing a dedicated fee structure for the CHI program for its FY27 year.

Enterprise revenue goals for FY26 and FY27 are already budgeted to accommodate known expenses within both years, and still introduce underfunded items within the allocations of both. Any diversion or use of annual operations funds – already-appropriated or Enterprise – would detract from another, existing funding item.



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To all members of AHS' Certified Historical Institutions program

Thank you for the vital role that you play in preserving and sharing your own unique histories in collective celebration across Arizona, and the energy you bring to enliven our past. I appreciate your response to our surveys, and your eagerness to do more with the CHI program as its members. We have some exciting things in store, but have our sights set on something far greater for the program – and you, its members.

The Problem

The recent cuts and changes in Federal grant funding has resulted in an annual loss of approximately **\$8.2 million** in direct support to local museums, archives, and historical societies across Arizona. AHS recognizes the challenge – and outright peril – this presents to many of this State's smaller museums and historical societies. When facing similar pressures in 2020, nearly half of Arizona's museums (250) closed permanently, resulting in a total GVA loss to the State of nearly **\$390m** and risking the fate of those orphaned collections and archives – to say nothing of the cultural and educational loss to communities.

The Solution

The Arizona Historical Society is committed to doing what it can to support its CHIs – if the Fed cannot accommodate, the State will have to do. AHS' proposal is to obtain an increase to its FY26 State appropriations budget, which it can then use to grow the CHI program with new services and more grants.

For the next two weeks, the Arizona Legislature is meeting to finalize the State's budget for FY26 - beginning July 1, 2025.

- The key talking point now is "Member-driven budgets."
- Under this budget system, Republican Legislators will each receive earmark funds to support programs in their local communities.
- AHS has recently asked each Legislator with a CHI in their district to support an increase to the CHI program, using a small fraction of their personal allocation.

The Ask

To accomplish this task, the Arizona Historical Society needs your help!



We ask that your organization please contact its respective Legislators to speak in support of AHS' funding request for the CHI program. Whether you call or email, please share with them your experiences in the CHI program and ask them to:

Personally consider AHS at this time, by assigning an increase of **\$50,000 - \$100,000** from their personal FY26 budget allocation to the Arizona Historical Society (HIA)'s SLI: Field Services & Grants budget.

And, should you use that language, please include:

This language was provided by the Arizona Historical Society.

If you send an email, I encourage you to copy Robert Ballard, Chair of the AHS State Board's Outreach Committee (BallarR@mohave.gov). AHS has already submitted this as a special funding allocation request to each Legislator in your district, but we need your support to make it a success.

You can find your State Legislator's contact information here:

<https://www.azleg.gov/findmylegislator/>



On behalf of the Arizona Historical Society, thank you!

Sincerely,

Dr. David Breeckner
AHS Executive Director

Funding Issue Narrative

Agency: Arizona Historical Society

Issue: 4 **Certified Historical Institutions (CHI) program**

Description of how this furthers the Governor's priorities:

The CHI program provides direct support by the State to cultural and historical organizations in communities across Arizona. Museums are a recognized contributor to local economies and further tourism efforts, while providing essential educational opportunities to nearby students and schools. However, many of these organizations are volunteer-run and operate with minimal budgets. More than one-third of all Arizona museums closed permanently since 2020. Those that remain exist on the fringe; support by the Governor and the Legislature on this initiative provides that direct support and ensures the continuation of these vital local, economic and social resources.

The agency's CHI program and the requested increase to its funding provide an easy, cost-effective solution that minimizes the State's investment while ensuring the continued success and growth of Arizona's history-based tourism and education sectors.

Issue: 5 **Utilities**

Description of Issue:

Increasing operating costs limit the Arizona Historical Society's capacity to grow or even meet the current needs of the people of Arizona. This is apparent in the rising cost of utilities, as the setting of AHS' two largest facilities – Arizona History Museum (Tucson) and Arizona Heritage Center (Tempe) – places them both at the center of major urban heat islands. The nature of collections and archival care demands a higher standard of environmental regulation and lower degree of cooling than most State buildings, resulting in higher utility bills which are already subject to annual rate hikes.

Current utility pricing is depressed against future anticipated expenses in this category, due to the historic closure of Pioneer Museum as the agency's third operating facility. With the reopening of Pioneer Museum in FY26, these utility costs are expected to grow.

Proposal:

\$35,000 increase to "Operating Budget" annual appropriations (FY27-onward). These funds would support annual utility rate increases at AHS properties, which have grown by 11.72% since FY22 without any proportionate increase in State funding. The requested increase to appropriations would address anticipated inflationary rate increases across FY26 and FY27 and offset new and added utility costs following the reopening of Pioneer Museum in FY26.

Alternatives Considered:

Presently, the agency has resolved the issue of utility rate increases through reallocations of existing funding, in conjunction with projected increase to earned revenue (Enterprise funds). However, the issue of regular annual rate increases is not presently sustainable in its offset by the agency's generated revenue sources.

Impact of Not Funding This Year:

The agency can absorb the anticipated utility rate increases for FY26. Should rates continue to increase at their current levels, this growing cost presents an impediment and detraction from the agency's own growth and will compel a reallocation and repurposing of annual allocated funds away from other operational areas under the agency's purview.

Statutory Reference:

- A.R.S. 41-821.B
- A.R.S. 41-823.B

Equipment to be Purchased (if applicable):

N/A

Classification of New Positions:

N/A

Annualization(s):

N/A

Alignment with Agency's Strategic Plan or Statutory Responsibilities:

By statute, the Arizona Historical Society may own and maintain property in the furtherance of its mission; additional statutes further assign the AHS to collect, preserve, and make accessible to the public items of historic value and to maintain suitable facilities for their care. The agency's two purpose-built facilities in Tempe and Tucson are the primary storehouses for the State's historic collections and archives, and require specialized environmental controls for their preservation. As the agency reopens its Pioneer Museum in FY26, these costs will further increase with the onlining of this closed facility. The current funding allocated to AHS' utilities is insufficient and presents a growing funding gap against facility utilities with annually-compounding rate increases. The agency requires additional support and has requested an increase to appropriations to defray those added costs.

Funding Issue Narrative

Agency: Arizona Historical Society

Issue: 5 Utilities

Impact on Historically Underserved, Marginalized, or Adversely Affected Groups:

This request resolves an identified funding issue that fulfills statutory obligations for the care of the agency's historical collections and archives by offsetting regular cost increases to its utility charges. If not addressed, the agency resolves these rate increases through reallocations to its overall budget, which includes public programs, education, and exhibits. These services, by merit of the populations served at the facility, positively impact a number of historically underserved, marginalized, or adversely affected groups.

How has feedback been incorporated from groups directly impacted by proposal?:

This proposal has been reviewed and is supported by the agency's finance team.

Description of how this furthers the Governor's priorities:

The proposed increase to appropriations is a matching solution by the State to the perfunctory costs of operating public facilities. This expense strikes to the core of basic operations for any State agency, but is also unique to the agency through the compliance with statute for the preservation and responsible care – through demanding environmental controls – of the material artifacts of Arizona's history.

The Governor's support for this request recognizes the rising costs of simple operations for the State agencies under her care, and the State's responsibility to support those agencies in that struggle so that their attention is not otherwise diverted from their statutory and strategic missions.

Issue: 6 Fleet Operating Adjustment (Operating Supplies): Vehicles

Description of Issue:

The Arizona Historical Society operates 3 facilities across the state, in the cities of Tempe, Tucson, and Flagstaff. Due to its limited size and headcount, agency personnel regularly travel between sites to support its statewide operations and activities, including educational programs, exhibit installations, facility repairs, artifact transfers, and collections and archival acquisitions. To support this, the agency maintains two registered fleet vehicles – one each at its Tempe and Tucson sites – with a third vehicle on annual rental contract. The current rental vehicle is required to support the recurring statewide activities of the agency's education staff, which often conflicts with usage of the agency's two owned fleet vehicles. With the reopening of Pioneer Museum in FY26, another (fourth) vehicle will be required. Neither the current rental nor the proposed fourth vehicle are covered in the agency's FY26 budget. A cost analysis reveals that – barring requiring state personnel to use POVs – it is most cost-effective for the agency to replace its current rental and the proposed fourth vehicle with two new, permanent fleet vehicles. For both, it is recommended that the agency consider economy sedans. AHS requires additional appropriations to meet these essential operational expenses looking ahead to FY27.

Proposal:

\$60,000 increase to "Operating Budget" annual appropriations (FY27). These funds would support the procurement of two new agency fleet vehicles: one to replace the agency's current rental vehicle and one to ensure vehicle coverage at its third, recently-reopened facility (Pioneer Museum, Flagstaff).

Alternatives Considered:

There are two alternatives in lieu of procurement purchases to resolve issues with the agency's current rental vehicle and its planned fourth vehicle:

1. Rental of new fleet vehicle(s) in lieu of purchase. This requires a smaller initial outlay, but sees continuing (and increasing) costs each year without the benefit of any acquired assets for the State.
2. Forego use of additional fleet or rental vehicles, and issue staff a general waiver for their use of POVs for all mandatory state travel. This increases the liability of the agency. This may also meet resistance by staff, who are entitled to decline or may not be in a position to accommodate the agency's request. In the event that staff decline any obligated use of POVs, the agency would have no recourse.

Impact of Not Funding This Year:

The agency can absorb the anticipated rental expenditure overages for a single rental vehicle – at most – through FY26 and FY27, but does not have the capacity to support the added costs of either a second rental vehicle or the purchase of two new vehicles entirely.

Without additional funding to support a new vehicle (rental or owned), the agency will have to effectively neuter the operational capacity of the Pioneer Museum. Staff assigned to the site will be confined to the property, except either when using a POV for agency business or when supported by visiting staff from other sites (Tucson or Tempe) in their site's respective vehicle. This will significantly impact operations, limiting both revenue generating and community development opportunities – in-classroom field trips, fairs and festivals, presentations, workshops, collections acquisitions – and everyday tasks like supply runs to the post office, bank, or hardware store.

Funding Issue 5

Utilities

Title in Detail Budget Book:

Operating Budget

Fund Source: General Fund

Proposal:

\$35,000 increase to “Operating Budget” annual appropriations (FY26-onward).

These funds would support annual utility rate increases at AHS properties, which have grown by **11.72%** since FY22 without any proportionate increase in State funding. The requested increase to appropriations would address anticipated inflationary rate increases across FY26 and FY27 and offset new and added utility costs following the reopening of Pioneer Museum in FY26.

Description of issue:

Increasing operating costs limit the Arizona Historical Society’s capacity to grow or even meet the current needs of the people of Arizona. This is apparent in the rising cost of utilities, as the setting of AHS’ two largest facilities – Arizona History Museum (Tucson) and Arizona Heritage Center (Tempe) – places them both at the center of major urban heat islands. The nature of collections and archival care demands a higher standard of environmental regulation and lower degree of cooling than most State buildings, resulting in higher utility bills which are already subject to annual rate hikes.

Current utility pricing is depressed against future anticipated expenses in this category, due to the historic closure of Pioneer Museum as the agency’s third operating facility. With the reopening of Pioneer Museum in FY26, these utility costs are expected to grow.

	FY2021	FY2022	FY2023	FY2024	FY2025
Total Utility Expenses	\$435,912	\$448,683	\$475,133	\$483,658	\$488,959
Increase percentage	N/A	2.93%	5.9%	1.79%	1.1%
Budgeted	\$373,430	\$400,358	\$336,000	\$395,000	\$412,000
Overage	\$62,482	\$48,325	\$139,133	\$88,658	\$76,959

Alternatives considered:

Presently, the agency has resolved the issue of utility rate increases through reallocations of existing funding, in conjunction with projected increase to earned revenue (Enterprise funds). However, the issue of regular annual rate increases is not presently sustainable in its offset by the agency's generated revenue sources.

Impact of not funding this year:

The agency can absorb the anticipated utility rate increases for FY26. Should rates continue to increase at their current levels, this growing cost presents an impediment and detraction from the agency's own growth and will compel a reallocation and repurposing of annual allocated funds away from other operational areas under the agency's purview.

Statutory reference:

- A.R.S. 41-821.B
- A.R.S. 41-823.B

Equipment to be purchased (if applicable):

N/A

Classification of new positions:

N/A

Annualization(s):

N/A

Alignment with agency's strategic plan or statutory responsibilities:

By statute, the Arizona Historical Society may own and maintain property in the furtherance of its mission; additional statutes further assign the AHS to collect, preserve, and make accessible to the public items of historic value and to maintain suitable facilities for their care. The agency's two purpose-built facilities in Tempe and Tucson are the primary storehouses for the State's historic collections and archives, and require specialized environmental controls for their preservation. As the agency reopens its Pioneer Museum in FY26, these costs will further increase with the onlining of this closed facility.

The current funding allocated to AHS' utilities is insufficient and presents a growing funding gap against facility utilities with annually-compounding rate increases. The agency requires additional support and has requested an increase to appropriations to defray those added costs.

Impact on historically underserved, marginalized, or adversely affected groups:

This request resolves an identified funding issue that fulfills statutory obligations for the care of the agency's historical collections and archives by offsetting regular cost increases to its utility charges. If not addressed, the agency resolves these rate increases through reallocations to its overall budget, which includes public programs, education, and exhibits. These services, by merit of the populations served at the facility, positively impact a number of historically underserved, marginalized, or adversely affected groups.

How has feedback been incorporated from groups directly impacted by proposal:

This proposal has been reviewed and is supported by the agency's finance team.

Description of how this furthers the Governor's priorities:

The proposed increase to appropriations is a matching solution by the State to the perfunctory costs of operating public facilities. This expense strikes to the core of basic operations for any State agency, but is also unique to the

agency through the compliance with statute for the preservation and responsible care – through demanding environmental controls – of the material artifacts of Arizona’s history.

The Governor’s support for this request recognizes the rising costs of simple operations for the State agencies under her care, and the State’s responsibility to support those agencies in that struggle so that their attention is not otherwise diverted from their statutory and strategic missions.

If requesting GF, why is it critical to continued operations?

The current funding allocated to AHS’ utilities is insufficient and presents a growing funding gap against facility utilities with annually-compounding rate increases. In the current fiscal year (FY26), AHS can accommodate those increases through reallocations of its existing budget and earned revenue (Enterprise funds); however, it cannot guarantee the capacity in future years as rates continue to increase on an annual basis. The agency requires additional support and has requested an increase to appropriations to defray those added costs.

If requesting GF, why can’t existing funding fully or partially meet the need?

Existing funding is being used to reconcile and compensate for the agency’s annual utility rate increases. As rates continue to increase on a compounding basis annually, AHS does not anticipate the capacity to reasonably continue this reallocation practice without implementing more significant cuts to its other programs and services.

As part of the Flagstaff Pioneer Museum SLI, \$100,000 has been internally allocated toward annual operational expenses. In FY26, immediate costs otherwise associated with the reopening of the facility (e.g. repairs and construction, IT, signage and printing, inventory) will preclude the availability of funds toward this expense. It is hoped that some funding will become available from this operational allocation in FY27 and FY28. This funding source terminates after FY28.

If requesting GF, why can’t other funds fully or partially meet the need?

None of the agency’s restricted reserves are appropriate to support this cost.

Enterprise revenue goals for FY26 and FY27 are already budgeted to accommodate known expenses within both years, and still introduce underfunded items within the allocations of both, but are subject to reallocation to accommodate annual rate increases.

Funding Issue Narrative

Agency:	Arizona Historical Society
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Issue:	6	Fleet Operating Adjustment (Operating Supplies): Vehicles
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Statutory Reference:	<ul style="list-style-type: none"> - A.R.S. 41-821.B - A.R.S. 41-823.A.1-4 - A.R.S. 41-823.B
Equipment to be Purchased (if applicable):	The additional requested appropriations would support the purchase of two mid-level sedans, each with an estimated value of approximately \$15,000.
Classification of New Positions:	N/A
Annualization(s):	N/A
Alignment with Agency's Strategic Plan or Statutory Responsibilities:	<p>Additional funding to cover the purchase of two new vehicles would support four of the Arizona Historical Society's strategic goals:</p> <ol style="list-style-type: none"> 1. Make AHS the most trusted source on Arizona history, 2. Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history, 3. Develop experiences that are meaningful and relevant to today's audiences, and 4. Establish AHS as a strong, recognizable brand. <p>To fulfill the agency's statutory responsibilities and strategic goals, it is often required for agency personnel to travel to an off-site location – businesses, civic buildings, personal residences – to acquire newly-donated collections or archival materials. Agency programs like its National History Day (NHD) competition, public speaker series, and Certified Historic Institutions (CHI) program are its leading activities that meaningfully engage today's audiences through dynamic and relevant experiences – with each requiring off-site (in-state) travel and a vehicle in which to do it. These off-site activities place the agency in the communities it serves, cementing their support and patronage whilst establishing AHS as a strong and recognizable statewide brand as the most trusted source in Arizona history.</p>
Impact on Historically Underserved, Marginalized, or Adversely Affected Groups:	This request will allow the agency to better maintain its facilities and grounds at the Pioneer Museum while supporting its off-site activities and services across the state through both its current and proposed rental vehicles. The mandatory upkeep and improvement of the agency's Flagstaff facility – its grounds, exhibits, collections care, and in-building education lessons – will allow it to better welcome and serve all persons and groups across Coconino County. The agency's capacity for off-site travel, as facilitated by these vehicles, is essential for the continuation of its NHD and CHI efforts across Arizona's most remote regions and communities.
How has feedback been incorporated from groups directly impacted by proposal?:	This proposal has been reviewed and is supported by the agency's finance team.
Description of how this furthers the Governor's priorities:	<p>Education – and access to it – is a key priority of the Governor. These vehicles directly support the State's third-grade education directives, which focus on Arizona State history. Making more educational resources available to students statewide is essential to this, and is best done in-person. These vehicle purchases would afford the agency that capacity for travel, ensuring no student, classroom, or struggling museum is lacking the tools to study and celebrate Arizona's history.</p> <p>The Governor's support for this request recognizes the rising costs of simple operations for the State agencies under her care, and the State's responsibility to support those agencies in that struggle so that their attention is not otherwise diverted from their statutory obligations and strategic mission.</p>

Issue:	7	Statewide Education: National History Day
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Funding Issue 6

Fleet Operating Adjustment (Operating Supplies): Vehicles

Title in Detail Budget Book:

Operating Budget

Fund Source: General Fund

Proposal:

\$60,000 increase to “Operating Budget” annual appropriations (FY27).

These funds would support the procurement of two new agency fleet vehicles: one to replace the agency’s current rental vehicle and one to ensure vehicle coverage at its third, recently-reopened facility (Pioneer Museum, Flagstaff).

Description of issue:

The Arizona Historical Society operates 3 facilities across the state, in the cities of Tempe, Tucson, and Flagstaff. Due to its limited size and headcount, agency personnel regularly travel between sites to support its statewide operations and activities, including educational programs, exhibit installations, facility repairs, artifact transfers, and collections and archival acquisitions. To support this, the agency maintains two registered fleet vehicles – one each at its Tempe and Tucson sites – with a third vehicle on annual rental contract. The current rental vehicle is required to support the recurring statewide activities of the agency’s education staff, which often conflicts with usage of the agency’s two owned fleet vehicles. With the reopening of Pioneer Museum in FY26, another (fourth) vehicle will be required.

Neither the current rental nor the proposed fourth vehicle are covered in the agency’s FY26 budget. A cost analysis reveals that – barring requiring state personnel to use POVs – it is most cost-effective for the agency to replace its current rental and the proposed fourth vehicle with two new, permanent fleet vehicles. For both, it is recommended that the agency consider economy sedans. AHS requires additional appropriations to meet these essential operational expenses looking ahead to FY27.

Alternatives considered:

There are two alternatives in lieu of procurement purchases to resolve issues with the agency's current rental vehicle and its planned fourth vehicle:

1. Rental of new fleet vehicle(s) in lieu of purchase. This requires a smaller initial outlay, but sees continuing (and increasing) costs each year without the benefit of any acquired assets for the State.
2. Forego use of additional fleet or rental vehicles, and issue staff a general waiver for their use of POVs for all mandatory state travel. This increases the liability of the agency. This may also meet resistance by staff, who are entitled to decline or may not be in a position to accommodate the agency's request. In the event that staff decline any obligated use of POVs, the agency would have no recourse.

Vehicle Price Options		FY25	FY26	FY27	FY28	FY29
	No. Vehicles	1	2	2	2	2
	Avg Miles Traveled	3,400	4,250	5,100	5,950	5,950
Option A	Fleet Vehicle	N/A	N/A	\$60,000	\$32,000	\$24,000
Option B	Rental Vehicle	\$12,500	\$30,000	\$32,500	\$34,00	\$36,000
Option C	POV Reimbursement \$0.67/mi	N/A	\$2,848 + Risk Management	\$3,417 + Risk Management	\$3,987 + Risk Management	\$3,987 + Risk Management

Impact of not funding this year:

The agency can absorb the anticipated rental expenditure overages for a single rental vehicle – at most – through FY26 and FY27, but does not have the capacity to support the added costs of either a second rental vehicle or the purchase of two new vehicles entirely.

Without additional funding to support a new vehicle (rental or owned), the agency will have to effectively neuter the operational capacity of the Pioneer Museum. Staff assigned to the site will be confined to the property, except either

when using a POV for agency business or when supported by visiting staff from other sites (Tucson or Tempe) in their site's respective vehicle. This will significantly impact operations, limiting both revenue-generating and community development opportunities – in-classroom field trips, fairs and festivals, presentations, workshops, collections acquisitions – and everyday tasks like supply runs to the post office, bank, or hardware store.

Statutory reference:

- A.R.S. 41-821.B
- A.R.S. 41-823.A.1-4
- A.R.S. 41-823.B

Equipment to be purchased (if applicable):

The additional requested appropriations would support the purchase of two mid-level sedans, each with an estimated value of approximately \$15,000.

Classification of new positions:

N/A

Annualization(s):

N/A

Alignment with agency's strategic plan or statutory responsibilities:

Additional funding to cover the purchase of two new vehicles would support four of the Arizona Historical Society's strategic goals:

1. Make AHS the most trusted source on Arizona history,
2. Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history,
3. Develop experiences that are meaningful and relevant to today's audiences, and
4. Establish AHS as a strong, recognizable brand.

To fulfill the agency's statutory responsibilities and strategic goals, it is often required for agency personnel to travel to an off-site location – businesses, civic buildings, personal residences – to acquire newly-donated collections or archival materials. Agency programs like its National History Day (NHD) competition, public speaker series, and Certified Historic Institutions (CHI) program are its leading activities that meaningfully engage today's audiences through dynamic and relevant experiences – with each requiring off-site (in-state) travel and a vehicle in which to do it. These off-site activities place the agency in the communities it serves, cementing their support and patronage whilst establishing AHS as a strong and recognizable statewide brand as the most trusted source in Arizona history.

Impact on historically underserved, marginalized, or adversely affected groups:

This request will allow the agency to better maintain its facilities and grounds at the Pioneer Museum while supporting its off-site activities and services across the state through both its current and proposed rental vehicles. The mandatory upkeep and improvement of the agency's Flagstaff facility – its grounds, exhibits, collections care, and in-building education lessons – will allow it to better welcome and serve all persons and groups across Coconino County. The agency's capacity for off-site travel, as facilitated by these vehicles, is essential for the continuation of its NHD and CHI efforts across Arizona's most remote regions and communities.

How has feedback been incorporated from groups directly impacted by proposal:

This proposal has been reviewed and is supported by the agency's finance team.

Description of how this furthers the Governor's priorities:

Education – and access to it – is a key priority of the Governor. These vehicles directly support the State's third-grade education directives, which focus on Arizona State history. Making more educational resources available to students statewide is essential to this, and is best done in-person. These vehicle purchases would afford the agency that capacity for travel, ensuring no student, classroom, or struggling museum is lacking the tools to study and celebrate Arizona's history.

The Governor's support for this request recognizes the rising costs of simple operations for the State agencies under her care, and the State's responsibility to support those agencies in that struggle so that their attention is not otherwise diverted from their statutory obligations and strategic mission.

If requesting GF, why is it critical to continued operations?

The agency's CHI and NHD programs have become statewide staples upon which numerous schools and smaller, nonprofit museums depend. Unfortunately, both programs depend on regular and reliable travel by agency staff across the year - which requires the continued procurement of the two described vehicles. For the vehicle to be assigned to Pioneer Museum, the remote location of this site from the other two agency facilities in Tucson and Tempe negates the possibility of rotating access between the agency's existing fleet. Barring an obligated use of POVs by staff at the Pioneer Museum, the operational demands of the site requires a fourth agency vehicle.

If requesting GF, why can't existing funding fully or partially meet the need?

In the immediate, AHS can accommodate the added costs of a singular vehicle rental through reallocations within its existing budget and earned revenue (Enterprise funds); however, it cannot guarantee the capacity in future years, especially with the addition of a second rental to its fleet. Unfortunately, the agency has no capacity to consider vehicle purchases in lieu of rentals, ensuring a slightly lower year-one expense but actually costing the agency more in subsequent years.

The agency requires additional support and has requested an increase to appropriations to better manage its financial resources against annual expenses.

As part of the Flagstaff Pioneer Museum SLI, \$100,000 has been internally allocated toward annual operational expenses. In FY26, immediate costs otherwise associated with the reopening of the facility (e.g. repairs and construction, IT, signage and printing, inventory) will preclude the availability of funds toward this expense. It is hoped that some funding will become available from this operational allocation in FY27 and FY28. This funding source terminates after FY28.

If requesting GF, why can't other funds fully or partially meet the need?

None of the agency's restricted reserves are appropriate to support this cost.

Enterprise revenue goals for FY26 and FY27 are already budgeted to accommodate known expenses within both years, and do not have the capacity to otherwise support this cost.

Funding Issue Narrative

Agency:	Arizona Historical Society	
Issue:	7	Statewide Education: National History Day
Description of Issue:	<p>The National History Day (NHD) competition is a signature program of the agency, which manages and leads all contests across Arizona. This competition, a “history science fair”, brings together middle and high school students in the discovery of historical, cultural, scientific, and social experiences of the past and results in a variety of student-created multimedia presentations, workshops, and research. The culmination of this program is its regional and statewide contests, with the Arizona winners going on to Nationals in Washington, D.C. to compete with the nation’s best.</p> <p>Unlike the NHD competitions in other states, the Arizona NHD contest under the AHS currently receives no state support. All funding for the NHD program is managed through public donations and volunteerism. An average of \$20,000 is raised annually to support this program but that funding capacity has hit a ceiling, this has (in turn) limited the future growth of the NHD program itself. Additional funding is required to support the continuing and future operational needs of Arizona’s premiere history education program.</p>	
Proposal:	<p>\$15,000 increase to “Operating Budget” annual appropriations (FY27-onward). These funds would support essential operations of the NHD program, including staff travel expenses to/from Washington, D.C. to chaperone Arizona’s winning students, facility rentals for 4 regional and 1 state competitions, and basic supplies for competing students across the days of competition.</p>	
Alternatives Considered:	<p>Presently, the agency augments its existing program costs through active fundraising. Efforts are ongoing to increase annual contributions, but as-yet cannot be reliably counted upon for future growth.</p>	
Impact of Not Funding This Year:	<p>Alternatively, the agency can cap its current program activities to limit future growth beyond its funding means.</p> <p>Without the first-time addition of State appropriations, the NHD program will be capped to operate within the bounds of its current program activities and established competition districts. This limitation will preclude the natural growth of the program, denying new schools and students the opportunity to easily join the annual competition.</p>	
Statutory Reference:	N/A	
Equipment to be Purchased (if applicable):	N/A	
Classification of New Positions:	N/A	
Annualization(s):	N/A	
Alignment with Agency’s Strategic Plan or Statutory Responsibilities:	<p>The appropriation of State funding for the NHD program would support three of the Arizona Historical Society’s strategic goals:</p> <ol style="list-style-type: none"> 1. Make AHS the most trusted source on Arizona history, 2. Develop experiences that are meaningful and relevant to today’s audiences, and 3. Establish AHS as a strong, recognizable brand. <p>The NHD competition is one of the agency’s leading activities that meaningfully engages today’s audiences through dynamic and relevant experiences. This work places staff directly into schools across the state, including its most remote regions and underserved communities, to work directly with students and train its educators on the annual contest. This work promotes the agency’s educational and professional services, introduces new audiences to its archival and collections resources, and establishes AHS as the most trusted source on Arizona’s history.</p>	

Funding Issue 7

Statewide Education: National History Day

Title in Detail Budget Book:

Operating Budget

Fund Source: General Fund

Proposal:

\$15,000 increase to “Operating Budget” annual appropriations (FY27-onward).

These funds would support essential operations of the NHD program, including staff travel expenses to/from Washington, D.C. to chaperone Arizona’s winning students, facility rentals for 4 regional and 1 state competitions, and basic supplies for competing students across the days of competition.

Description of issue:

The National History Day (NHD) competition is a signature program of the agency, which manages and leads all contests across Arizona. This competition, a “history science fair”, brings together middle and high school students in the discovery of historical, cultural, scientific, and social experiences of the past and results in a variety of student-created multimedia presentations, workshops, and research. The culmination of this program is its regional and statewide contests, with the Arizona winners going on to Nationals in Washington, D.C. to compete with the nation’s best.

Unlike the NHD competitions in other states, the Arizona NHD contest under the AHS currently receives no state support. All funding for the NHD program is managed through public donations and volunteership. An average of \$20,000 is raised annually to support this program but that funding capacity has hit a ceiling, this has (in turn) limited the future growth of the NHD program itself. Additional funding is required to support the continuing and future operational needs of Arizona’s premiere history education program.

Alternatives considered:

Presently, the agency augments its existing program costs through active fundraising. Efforts are ongoing to increase annual contributions, but as-yet cannot be reliably counted upon for future growth.

Alternatively, the agency can cap its current program activities to limit future growth beyond its funding means.

Impact of not funding this year:

Without the first-time addition of State appropriations, the NHD program will be capped to operate within the bounds of its current program activities and established competition districts. This limitation will preclude the natural growth of the program, denying new schools and students the opportunity to easily join the annual competition.

Statutory reference:

N/A

Equipment to be purchased (if applicable):

N/A

Classification of new positions:

N/A

Annualization(s):

N/A

Alignment with agency's strategic plan or statutory responsibilities:

The appropriation of State funding for the NHD program would support three of the Arizona Historical Society's strategic goals:

1. Make AHS the most trusted source on Arizona history,
2. Develop experiences that are meaningful and relevant to today's audiences, and

3. Establish AHS as a strong, recognizable brand.

The NHD competition is one of the agency's leading activities that meaningfully engages today's audiences through dynamic and relevant experiences. This work places staff directly into schools across the state, including its most remote regions and underserved communities, to work directly with students and train its educators on the annual contest. This work promotes the agency's educational and professional services, introduces new audiences to its archival and collections resources, and establishes AHS as the most trusted source on Arizona's history.

Impact on historically underserved, marginalized, or adversely affected groups:

This work places staff directly into schools across the state, including its most remote regions and underserved communities, and elevates participating students with unique opportunities based on their academic and creative prowess. Regional winners are afforded the opportunity to travel and compete in a national contest outside Phoenix, while state winners travel and compete in Washington, D.C. for the chance to see their work exhibited in the White House and Smithsonian.

How has feedback been incorporated from groups directly impacted by proposal:

This proposal has been reviewed and is supported by the agency's finance and education teams, as well as its NHD partnering schools, donors, and volunteers.

Description of how this furthers the Governor's priorities:

Education – and access to it – is a key priority of the Governor. These funds directly support the State's premiere history program for students. It ensures that the lessons of Arizona's history instilled in third-grade education directives, continue to be remembered and applied beyond elementary school.

The Governor's support for this request would be the first investment of its kind by the State of Arizona in its own National History Day competition.

If requesting GF, why is it critical to continued operations?

The NHD competition is the agency's premiere education program. In addition to meeting the State's priorities for student education in history, an intentional by-product of this work is the secondary **revenue generated** by subsequent field trip bookings from participating schools and parent-inspired donations, museum visitations, and memberships. The capacity and competency demonstrated by the agency through its NHD program is the ultimate marketing tool and proof-of-concept for its other educational services and programs.

If requesting GF, why can't existing funding fully or partially meet the need?

The NHD program is not currently funded by any state appropriations.

If requesting GF, why can't other funds fully or partially meet the need?

None of the agency's restricted reserves are appropriate to support this cost.

The agency presently works with external partners, principally its friend group the Historical League, to fundraise over \$20,000 annually in support of this program. Additional funds are secured through corporate sponsorship, most notably SRP. However, these costs are largely confined to the expenses incurred from the students' travel to the State and National contests and does not provide for the secondary costs of venue and basic amenities across the days of competition.

Funding Issue Narrative

Agency:	Arizona Historical Society
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Issue:	7	Statewide Education: National History Day
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Impact on Historically Underserved, Marginalized, or Adversely Affected Groups:	This work places staff directly into schools across the state, including its most remote regions and underserved communities, and elevates participating students with unique opportunities based on their academic and creative prowess. Regional winners are afforded the opportunity to travel and compete in a national contest outside Phoenix, while state winners travel and compete in Washington, D.C. for the chance to see their work exhibited in the White House and Smithsonian.
How has feedback been incorporated from groups directly impacted by proposal?:	This proposal has been reviewed and is supported by the agency's finance and education teams, as well as its NHD partnering schools, donors, and volunteers.
Description of how this furthers the Governor's priorities:	Education – and access to it – is a key priority of the Governor. These funds directly support the State's premiere history program for students. It ensures that the lessons of Arizona's history instilled in third-grade education directives, continue to be remembered and applied beyond elementary school. The Governor's support for this request would be the first investment of its kind by the State of Arizona in its own National History Day competition.

Issue:	8	Statewide Operations: In-State Travel
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Description of Issue:	Similar to Funding Issues 6 and 7, the increased operational activities of the agency across the state have resulted in increased costs from in-state travel expenses. In FY25, of the originally-budgeted \$10,000, \$25,000 was instead spent, resulting in a \$15,000 overage. These overages describe both staff travel in support of public-programs like the National History Day (NHD) and Certified Historical Institutions (CHI) as well as inter-site activities such as collections and archives transfers, exhibit installations, added staff support for on-site events, and facilities maintenance. Due to the limited staffing at each agency site, these inter-site travels (often requiring overnight accommodations) are necessary to ensure all agency facilities can operate effectively. The agency does not have sufficient financial resources to cover these costs. Additional funding through State appropriations is required to maintain the agency's operations and programs to their current standards.
Proposal:	\$15,000 increase to "Operating Budget" annual appropriations (FY27-onward).
Alternatives Considered:	Whenever possible, the agency seeks to minimize staff trips between its operating sites - or to otherwise combine trips to minimize costs. Overnight stays are employed only as a last resort, with many staff actually preferring to exceed their 8 daily work hours to return on the same day as departure. Approvals for trips – day or overnight – are subject to supervisory approval as an additional financial control. This has resulted in nearly \$10,000 in annual savings from FY24. Spending patterns since FY23 indicate a consistent, year-over-year cost for in-state travel of \$25,000 – no matter how aspirational an annual budget of \$10,000 may be.
Impact of Not Funding This Year:	The agency can absorb overages for FY26 through a combination of its HI2906 Operational Reserves and the allocated operating funds of the Pioneer Museum (which is expected to require extended staff travel to/from other agency sites). By FY27, these funding sources will no longer be viable; barring additional State appropriations, the agency will need to significantly curtail the in-state travels and support network of its dispersed staff. Commensurate with the FY25 budget overrun in this category, this would require a 60% reduction of the agency's in-state travel.
Statutory Reference:	- A.R.S. 41-821.B - A.R.S. 41-823.B
Equipment to be Purchased (if applicable):	N/A
Classification of New Positions:	N/A

Funding Issue 8

Statewide Operations: In-State Travel

Title in Detail Budget Book:

Operating Budget

Fund Source: General Fund

Proposal:

\$15,000 increase to “Operating Budget” annual appropriations (FY27-onward).

Description of issue:

Similar to Funding Issues 6 and 7, the increased operational activities of the agency across the state have resulted in increased costs from in-state travel expenses. In FY25, of the originally-budgeted \$10,000, \$25,000 was instead spent, resulting in a \$15,000 overage. These overages describe both staff travel in support of public-programs like the National History Day (NHD) and Certified Historical Institutions (CHI) as well as inter-site activities such as collections and archives transfers, exhibit installations, added staff support for on-site events, and facilities maintenance. Due to the limited staffing at each agency site, these inter-site travels (often requiring overnight accommodations) are necessary to ensure all agency facilities can operate effectively.

The agency does not have sufficient financial resources to cover these costs. Additional funding through State appropriations is required to maintain the agency’s operations and programs to their current standards.

In-State Travel Costs	FY23	FY24	FY25	FY26	FY27
Budgeted	\$12,300	\$25,000	\$10,000	\$10,000	\$25,000
Actual	\$29,709	\$35,853	\$25,604	N/A	N/A
Total	\$17,409	\$10,853	\$15,604	N/A	N/A

Alternatives considered:

Whenever possible, the agency seeks to minimize staff trips between its operating sites - or to otherwise combine trips to minimize costs. Overnight stays are employed only as a last resort, with many staff actually preferring to exceed their 8 daily work hours to return on the same day as departure. Approvals for trips – day or overnight – are subject to supervisory approval as an additional financial control. This has resulted in nearly \$10,000 in annual savings from FY24.

Spending patterns since FY23 indicate a consistent, year-over-year cost for in-state travel of \$25,000 – no matter how aspirational an annual budget of \$10,000 may be.

Impact of not funding this year:

The agency can absorb overages for FY26 through a combination of its HI2906 Operational Reserves and the allocated operating funds of the Pioneer Museum (which is expected to require extended staff travel to/from other agency sites). By FY27, these funding sources will no longer be viable; barring additional State appropriations, the agency will need to significantly curtail the in-state travels and support network of its dispersed staff. Commensurate with the FY25 budget overrun in this category, this would require a **60% reduction** of the agency's in-state travel.

Statutory reference:

- A.R.S. 41-821.B
- A.R.S. 41-823.B

Equipment to be purchased (if applicable):

N/A

Classification of new positions:

N/A

Annualization(s):

N/A

Alignment with agency's strategic plan or statutory responsibilities:

The added State appropriation to cover funding deficiencies for the agency's in-state travel would support two of the Arizona Historical Society's strategic goals:

1. Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history,
2. Develop experiences that are meaningful and relevant to today's audiences, and

The NHD competition and CHI program are two of the agency's leading activities that meaningfully engages today's audiences through dynamic and relevant experiences. This work places staff directly into schools and independent museums across the state, including its most remote regions and underserved communities - and requires frequent travel to do so. To fulfill the agency's statutory responsibilities and strategic goals, it is often required for agency personnel to travel between its operating sites, for the likes of materials transfers, programmatic support, facility repairs, and new installations. These inter-site travels, which do occasionally require overnight stays, are essential to the agency meeting its statutory obligations.

Impact on historically underserved, marginalized, or adversely affected groups:

This work places staff directly into schools and smaller museums across the state, including its most remote regions and underserved communities. The services and assistance it provides through these travels directly benefit a diverse multitude of Arizona's people.

How has feedback been incorporated from groups directly impacted by proposal:

This proposal has been reviewed and is supported by the agency's finance team.

Description of how this furthers the Governor's priorities:

The Governor's support for this request recognizes the rising costs of simple operations for the State agencies under her care, and the State's responsibility to support those agencies in that struggle so that their attention and capacity are not otherwise diverted from their statutory obligations and strategic mission.

If requesting GF, why is it critical to continued operations?

The agency's CHI and NHD programs have become statewide staples upon which numerous schools and smaller, nonprofit museums depend. Unfortunately, both programs depend on regular and reliable travel by agency staff across the year - which requires a sufficiently-funded in-state travel budget. Barring additional funding to resolve this deficiency, by FY27 the agency will need to entertain a significant reduction in its off-site services and activities (**60%**).

If requesting GF, why can't existing funding fully or partially meet the need?

AHS does not have sufficient revenue capacity within its annual budget (either through HI2900 Enterprise or HI2025 Donations) to accommodate an operational deficiency of this nature. Significant budgetary changes to the agency – updates to revenue goals and expense reductions in FY24 and FY25, including the closure of one facility and divestiture of three properties – were already implemented to achieve a balanced budget for FY26; an increase of this sort is not possible at this time given those changes already made.

If requesting GF, why can't other funds fully or partially meet the need?

None of the agency's restricted reserves are appropriate to support this cost, except in an emergency situation via the use of the agency's non-replenishing HI2906 Operational Reserves.

Funding Issue Narrative

Agency:	Arizona Historical Society	
Issue:	8	Statewide Operations: In-State Travel
Annualization(s):	N/A	
Alignment with Agency's Strategic Plan or Statutory Responsibilities:	<p>The added State appropriation to cover funding deficiencies for the agency's in-state travel would support two of the Arizona Historical Society's strategic goals:</p> <ol style="list-style-type: none"> 1. Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history, 2. Develop experiences that are meaningful and relevant to today's audiences, and <p>The NHD competition and CHI program are two of the agency's leading activities that meaningfully engages today's audiences through dynamic and relevant experiences. This work places staff directly into schools and independent museums across the state, including its most remote regions and underserved communities - and requires frequent travel to do so. To fulfill the agency's statutory responsibilities and strategic goals, it is often required for agency personnel to travel between its operating sites, for the likes of materials transfers, programmatic support, facility repairs, and new installations. These inter-site travels, which do occasionally require overnight stays, are essential to the agency meeting its statutory obligations.</p>	
Impact on Historically Underserved, Marginalized, or Adversely Affected Groups:	<p>This work places staff directly into schools and smaller museums across the state, including its most remote regions and underserved communities. The services and assistance it provides through these travels directly benefit a diverse multitude of Arizona's people.</p>	
How has feedback been incorporated from groups directly impacted by proposal?:	<p>This proposal has been reviewed and is supported by the agency's finance team.</p>	
Description of how this furthers the Governor's priorities:	<p>The Governor's support for this request recognizes the rising costs of simple operations for the State agencies under her care, and the State's responsibility to support those agencies in that struggle so that their attention and capacity are not otherwise diverted from their statutory obligations and strategic mission.</p>	

Summary of Expenditure and Budget Request for All Funds

Agency: Arizona Historical Society

Appropriated Funds		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:					
HIA-1-0	Arizona Historical Society	2,975.9	4,113.5	775.5	4,889.0
Appropriated Funds Total:		2,975.9	4,113.5	775.5	4,889.0
Expenditure Categories					
FTE		54.9	54.9	-	54.9
Personal Services		1,663.5	1,296.7	217.1	1,513.8
Employee Related Expenditures		677.0	642.4	93.4	735.8
Subtotal Personal Services and ERE		2,340.4	1,939.1	310.5	2,249.6
Professional & Outside Services		(0.1)	0.8	-	0.8
Travel In-State		4.1	5.3	15.0	20.3
Travel Out-Of-State		-	1.8	-	1.8
Aid To Organizations & Individuals		48.6	66.9	40.0	106.9
Other Operating Expenditures		582.9	2,099.6	410.0	2,509.6
Non-Capital Equipment		-	-	-	-
Expenditure Categories Total:		2,975.9	4,113.5	775.5	4,889.0

Summary of Expenditure and Budget Request for All Funds

Agency:		Arizona Historical Society			
Non-Appropriated		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:					
HIA-1-0	Arizona Historical Society	1,118.3	-	-	-
Non-Appropriated Total:		1,118.3	-	-	-
Expenditure Categories					
	FTE	-	-	-	-
	Personal Services	180.8	-	-	-
	Employee Related Expenditures	79.0	-	-	-
	Subtotal Personal Services and ERE	259.8	-	-	-
	Professional & Outside Services	30.4	-	-	-
	Travel In-State	21.5	-	-	-
	Travel Out-Of-State	7.1	-	-	-
	Aid To Organizations & Individuals	26.6	-	-	-
	Other Operating Expenditures	758.7	-	-	-
	Non-Capital Equipment	14.3	-	-	-
Expenditure Categories Total:		1,118.3	-	-	-
Arizona Historical Society Total for All Funds:		4,094.2	4,113.5	775.5	4,889.0
Appropriated and Non-Appropriated		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2026 Funding Issue	FY 2027 Total Request
HIA-1-0	Arizona Historical Society	4,094.2	4,113.5	775.5	4,889.0
Arizona Historical Society Total for All Funds:		4,094.2	4,113.5	775.5	4,889.0

Summary of Expenditure and Budget Request for Selected Funds

Agency:	Arizona Historical Society
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Fund:	AA1000 General Fund (Appropriated)
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		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:					
HIA-1-0	Arizona Historical Society	2,975.9	4,113.5	775.5	4,889.0
General Fund (Appropriated) Summary Total:		2,975.9	4,113.5	775.5	4,889.0
Expenditure Categories					
	FTE	54.9	54.9	-	54.9
	Personal Services	1,663.5	1,296.7	217.1	1,513.8
	Employee Related Expenditures	677.0	642.4	93.4	735.8
	Subtotal Personal Services and ERE	2,340.4	1,939.1	310.5	2,249.6
	Professional & Outside Services	(0.1)	0.8	-	0.8
	Travel In-State	4.1	5.3	15.0	20.3
	Travel Out-Of-State	-	1.8	-	1.8
	Aid To Organizations & Individuals	48.6	66.9	40.0	106.9
	Other Operating Expenditures	582.9	2,099.6	410.0	2,509.6
	Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:		2,975.9	4,113.5	775.5	4,889.0

Summary of Expenditure and Budget Request for Selected Funds

Agency:	Arizona Historical Society
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Fund:	HI2000 Federal Grants Fund (Non-Appropriated)
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		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:					
HIA-1-0	Arizona Historical Society	2.3	-	-	-
	Federal Grants Fund (Non-Appropriated)	2.3	-	-	-
	Summary Total:				
Expenditure Categories					
	FTE	-	-	-	-
	Personal Services	-	-	-	-
	Employee Related Expenditures	-	-	-	-
	Subtotal Personal Services and ERE	-	-	-	-
	Professional & Outside Services	-	-	-	-
	Travel In-State	-	-	-	-
	Travel Out-Of-State	-	-	-	-
	Aid To Organizations & Individuals	-	-	-	-
	Other Operating Expenditures	2.3	-	-	-
	Non-Capital Equipment	-	-	-	-
	Expenditure Categories Total:	2.3	-	-	-

Summary of Expenditure and Budget Request for Selected Funds

Agency:	Arizona Historical Society
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Fund:	HI2025 Donations Fund (Non-Appropriated)
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		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:					
HIA-1-0	Arizona Historical Society	385.7	-	-	-
	Donations Fund (Non-Appropriated) Summary Total:	385.7	-	-	-
Expenditure Categories					
	FTE	-	-	-	-
	Personal Services	32.7	-	-	-
	Employee Related Expenditures	14.8	-	-	-
	Subtotal Personal Services and ERE	47.5	-	-	-
	Professional & Outside Services	24.5	-	-	-
	Travel In-State	20.1	-	-	-
	Travel Out-Of-State	7.1	-	-	-
	Aid To Organizations & Individuals	26.6	-	-	-
	Other Operating Expenditures	245.6	-	-	-
	Non-Capital Equipment	14.3	-	-	-
	Expenditure Categories Total:	385.7	-	-	-

Summary of Expenditure and Budget Request for Selected Funds

Agency:	Arizona Historical Society
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Fund:	HI2125 Historical Society Preservation/Restoration Fund (Non-Appropriated)
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		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:					
HIA-1-0	Arizona Historical Society	20.3	-	-	-
	Historical Society Preservation/Restoration Fund (Non-Appropriated) Summary Total:	20.3	-	-	-
Expenditure Categories					
	FTE	-	-	-	-
	Personal Services	-	-	-	-
	Employee Related Expenditures	-	-	-	-
	Subtotal Personal Services and ERE	-	-	-	-
	Professional & Outside Services	-	-	-	-
	Travel In-State	-	-	-	-
	Travel Out-Of-State	-	-	-	-
	Aid To Organizations & Individuals	-	-	-	-
	Other Operating Expenditures	20.3	-	-	-
	Non-Capital Equipment	-	-	-	-
	Expenditure Categories Total:	20.3	-	-	-

Summary of Expenditure and Budget Request for Selected Funds

Agency:	Arizona Historical Society
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Fund:	HI2900 Permanent AZ Historical Society Revolving Fund (Non-Appropriated)
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		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:					
HIA-1-0	Arizona Historical Society	710.1	-	-	-
	Permanent AZ Historical Society Revolving Fund (Non-Appropriated) Summary Total:	710.1	-	-	-
Expenditure Categories					
	FTE	-	-	-	-
	Personal Services	148.1	-	-	-
	Employee Related Expenditures	64.1	-	-	-
	Subtotal Personal Services and ERE	212.3	-	-	-
	Professional & Outside Services	5.8	-	-	-
	Travel In-State	1.4	-	-	-
	Travel Out-Of-State	-	-	-	-
	Aid To Organizations & Individuals	-	-	-	-
	Other Operating Expenditures	490.5	-	-	-
	Non-Capital Equipment	-	-	-	-
	Expenditure Categories Total:	710.1	-	-	-

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

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				

Expenditure Categories

FTE	54.9	54.9	-	54.9
Personal Services	1,844.3	1,296.7	217.1	1,513.8
Employee Related Expenditures	755.9	642.4	93.4	735.8
Subtotal Personal Services and ERE	2,600.2	1,939.1	310.5	2,249.6
Professional & Outside Services	30.3	0.8	-	0.8
Travel In-State	25.6	5.3	15.0	20.3
Travel Out-Of-State	7.1	1.8	-	1.8
Aid To Organizations & Individuals	75.2	66.9	40.0	106.9
Other Operating Expenditures	1,341.5	2,099.6	410.0	2,509.6
Non-Capital Equipment	14.3	-	-	-
Expenditure Categories Total:	4,094.2	4,113.5	775.5	4,889.0

Fund Source

Appropriated Funds

General Fund (Appropriated)	2,975.9	4,113.5	775.5	4,889.0
Appropriated Funds Total:	2,975.9	4,113.5	775.5	4,889.0

Non-Appropriated Funds

Federal Grants Fund (Non-Appropriated)	2.3	-	-	-
Donations Fund (Non-Appropriated)	385.7	-	-	-
Historical Society Preservation/Restoration Fund (Non-Appropriated)	20.3	-	-	-
Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	710.1	-	-	-
Non-Appropriated Funds Total:	1,118.3	-	-	-
Arizona Historical Society Total:	4,094.2	4,113.5	775.5	4,889.0

Sub Program: HIA-1-1 Arizona Historical Society

Expenditure Categories

FTE	44.4	54.9	-	54.9
Personal Services	1,508.8	1,296.7	147.1	1,443.8
Employee Related Expenditures	593.0	642.4	63.4	705.8

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

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-1 Arizona Historical Society				
Subtotal Personal Services and ERE	2,101.8	1,939.1	210.5	2,149.6
Professional & Outside Services	24.6	0.8	-	0.8
Travel In-State	24.8	5.3	15.0	20.3
Travel Out-Of-State	7.1	1.8	-	1.8
Aid To Organizations & Individuals	41.7	-	-	-
Other Operating Expenditures	900.5	447.9	410.0	857.9
Non-Capital Equipment	14.3	-	-	-
Expenditure Categories Total:	3,114.8	2,394.9	635.5	3,030.4
Fund Source				
Appropriated Funds				
General Fund (Appropriated)	2,343.8	2,394.9	635.5	3,030.4
Appropriated Funds Total:	2,343.8	2,394.9	635.5	3,030.4
Non-Appropriated Funds				
Donations Fund (Non-Appropriated)	310.1	-	-	-
Historical Society Preservation/Restoration Fund (Non-Appropriated)	20.3	-	-	-
Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	440.7	-	-	-
Non-Appropriated Funds Total:	771.0	-	-	-
Arizona Historical Society Total:	3,114.8	2,394.9	635.5	3,030.4

Sub Program: HIA-1-2 SLI Field Services and Grants

Expenditure Categories				
FTE	0.5	-	-	-
Personal Services	23.8	-	-	-
Employee Related Expenditures	7.0	-	-	-
Subtotal Personal Services and ERE	30.8	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	0.7	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	33.5	66.9	40.0	106.9
Other Operating Expenditures	5.8	-	-	-

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

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-2 SLI Field Services and Grants				
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	70.8	66.9	40.0	106.9
Fund Source				
Appropriated Funds				
General Fund (Appropriated)	64.3	66.9	40.0	106.9
Appropriated Funds Total:	64.3	66.9	40.0	106.9
Non-Appropriated Funds				
Federal Grants Fund (Non-Appropriated)	2.3	-	-	-
Donations Fund (Non-Appropriated)	4.2	-	-	-
Non-Appropriated Funds Total:	6.5	-	-	-
Arizona Historical Society Total:	70.8	66.9	40.0	106.9

Sub Program: HIA-1-3 SLI Papago Park Museum

Expenditure Categories				
FTE	10.0	-	-	-
Personal Services	311.7	-	70.0	70.0
Employee Related Expenditures	155.9	-	30.0	30.0
Subtotal Personal Services and ERE	467.6	-	100.0	100.0
Professional & Outside Services	5.6	-	-	-
Travel In-State	0.1	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	435.3	572.6	-	572.6
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	908.6	572.6	100.0	672.6

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

Agency: Arizona Historical Society

		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:	HIA-1-0 Arizona Historical Society				
Sub Program:	HIA-1-3 SLI Papago Park Museum				

Fund Source

Appropriated Funds

General Fund (Appropriated)	567.9	572.6	100.0	672.6
Appropriated Funds Total:	567.9	572.6	100.0	672.6

Non-Appropriated Funds

Donations Fund (Non-Appropriated)	71.3	-	-	-
Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	269.4	-	-	-
Non-Appropriated Funds Total:	340.7	-	-	-
Arizona Historical Society Total:	908.6	572.6	100.0	672.6

Sub Program: HIA-1-5 SLI Flagstaff Pioneer Museum

Expenditure Categories

FTE	-	-	-	-
Personal Services	-	-	-	-
Employee Related Expenditures	-	-	-	-
Subtotal Personal Services and ERE	-	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	-	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	-	1,079.1	-	1,079.1
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	-	1,079.1	-	1,079.1

Fund Source

Appropriated Funds

General Fund (Appropriated)	-	1,079.1	-	1,079.1
Appropriated Funds Total:	-	1,079.1	-	1,079.1
Arizona Historical Society Total:	-	1,079.1	-	1,079.1

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

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Fund: AA1000 General Fund				
Appropriated				
Personal Services	1,663.5	1,296.7	217.1	1,513.8
Employee Related Expenditures	677.0	642.4	93.4	735.8
Subtotal Personal Services and ERE	2,340.4	1,939.1	310.5	2,249.6
Professional & Outside Services	(0.1)	0.8	-	0.8
Travel In-State	4.1	5.3	15.0	20.3
Travel Out-Of-State	-	1.8	-	1.8
Aid To Organizations & Individuals	48.6	66.9	40.0	106.9
Other Operating Expenditures	582.9	2,099.6	410.0	2,509.6
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	2,975.9	4,113.5	775.5	4,889.0
General Fund Total:	2,975.9	4,113.5	775.5	4,889.0

Fund: HI2000 Federal Grants Fund

Non-Appropriated				
Personal Services	-	-	-	-
Employee Related Expenditures	-	-	-	-
Subtotal Personal Services and ERE	-	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	-	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	2.3	-	-	-
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	2.3	-	-	-
Federal Grants Fund Total:	2.3	-	-	-

Fund: HI2025 Donations Fund

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

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Fund: HI2025 Donations Fund				
Non-Appropriated				
Personal Services	32.7	-	-	-
Employee Related Expenditures	14.8	-	-	-
Subtotal Personal Services and ERE	47.5	-	-	-
Professional & Outside Services	24.5	-	-	-
Travel In-State	20.1	-	-	-
Travel Out-Of-State	7.1	-	-	-
Aid To Organizations & Individuals	26.6	-	-	-
Other Operating Expenditures	245.6	-	-	-
Non-Capital Equipment	14.3	-	-	-
Expenditure Categories Total:	385.7	-	-	-
Donations Fund Total:	385.7	-	-	-

Fund: HI2125 Historical Society Preservation/Restoration Fund

Non-Appropriated				
Personal Services	-	-	-	-
Employee Related Expenditures	-	-	-	-
Subtotal Personal Services and ERE	-	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	-	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	20.3	-	-	-
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	20.3	-	-	-
Historical Society Preservation/Restoration Fund Total:	20.3	-	-	-

Fund: HI2900 Permanent AZ Historical Society Revolving Fund

Non-Appropriated

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

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Fund: HI2900 Permanent AZ Historical Society Revolving Fund				
Personal Services	148.1	-	-	-
Employee Related Expenditures	64.1	-	-	-
Subtotal Personal Services and ERE	212.3	-	-	-
Professional & Outside Services	5.8	-	-	-
Travel In-State	1.4	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	490.5	-	-	-
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	710.1	-	-	-
Permanent AZ Historical Society Revolving Fund Total:	710.1	-	-	-
Program Total for Select Funds:	4,094.2	4,113.5	775.5	4,889.0

Sub Program: HIA-1-1 Arizona Historical Society

Fund: AA1000 General Fund

Appropriated

Personal Services	1,395.0	1,296.7	147.1	1,443.8
Employee Related Expenditures	547.7	642.4	63.4	705.8
Subtotal Personal Services and ERE	1,942.8	1,939.1	210.5	2,149.6
Professional & Outside Services	(0.1)	0.8	-	0.8
Travel In-State	4.1	5.3	15.0	20.3
Travel Out-Of-State	-	1.8	-	1.8
Aid To Organizations & Individuals	15.1	-	-	-
Other Operating Expenditures	381.9	447.9	410.0	857.9
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	2,343.8	2,394.9	635.5	3,030.4
General Fund Total:	2,343.8	2,394.9	635.5	3,030.4

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

Agency: Arizona Historical Society

			FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:	HIA-1-0	Arizona Historical Society				
Sub Program:	HIA-1-1	Arizona Historical Society				
Fund:	HI2025	Donations Fund				

Non-Appropriated

Personal Services	4.7	-	-	-
Employee Related Expenditures	2.2	-	-	-
Subtotal Personal Services and ERE	6.8	-	-	-
Professional & Outside Services	24.5	-	-	-
Travel In-State	19.3	-	-	-
Travel Out-Of-State	7.1	-	-	-
Aid To Organizations & Individuals	26.6	-	-	-
Other Operating Expenditures	211.4	-	-	-
Non-Capital Equipment	14.3	-	-	-
Expenditure Categories Total:	310.1	-	-	-
Donations Fund Total:	310.1	-	-	-

Fund: HI2125 Historical Society Preservation/Restoration Fund

Non-Appropriated

Personal Services	-	-	-	-
Employee Related Expenditures	-	-	-	-
Subtotal Personal Services and ERE	-	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	-	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	20.3	-	-	-
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	20.3	-	-	-
Historical Society Preservation/Restoration Fund Total:	20.3	-	-	-

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

Agency: Arizona Historical Society

			FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:	HIA-1-0	Arizona Historical Society				
Sub Program:	HIA-1-1	Arizona Historical Society				
Fund:	HI2900	Permanent AZ Historical Society Revolving Fund				

Non-Appropriated

Personal Services	109.1	-	-	-
Employee Related Expenditures	43.1	-	-	-
Subtotal Personal Services and ERE	152.2	-	-	-
Professional & Outside Services	0.2	-	-	-
Travel In-State	1.4	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	286.9	-	-	-
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	440.7	-	-	-
Permanent AZ Historical Society Revolving Fund Total:	440.7	-	-	-
Sub Program Total for Select Funds:	3,114.8	2,394.9	635.5	3,030.4

Sub Program: HIA-1-2 SLI Field Services and Grants

Fund: AA1000 General Fund

Appropriated

Personal Services	23.8	-	-	-
Employee Related Expenditures	7.0	-	-	-
Subtotal Personal Services and ERE	30.8	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	-	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	33.5	66.9	40.0	106.9
Other Operating Expenditures	-	-	-	-
Non-Capital Equipment	-	-	-	-

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

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-2 SLI Field Services and Grants				
Fund: AA1000 General Fund				
Expenditure Categories Total:	64.3	66.9	40.0	106.9
General Fund Total:	64.3	66.9	40.0	106.9

Fund: HI2000 Federal Grants Fund

Non-Appropriated

Personal Services	-	-	-	-
Employee Related Expenditures	-	-	-	-
Subtotal Personal Services and ERE	-	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	-	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	2.3	-	-	-
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	2.3	-	-	-
Federal Grants Fund Total:	2.3	-	-	-

Fund: HI2025 Donations Fund

Non-Appropriated

Personal Services	-	-	-	-
Employee Related Expenditures	-	-	-	-
Subtotal Personal Services and ERE	-	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	0.7	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	3.5	-	-	-
Non-Capital Equipment	-	-	-	-

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

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-2 SLI Field Services and Grants				
Fund: HI2025 Donations Fund				
Expenditure Categories Total:	4.2	-	-	-
Donations Fund Total:	4.2	-	-	-
Sub Program Total for Select Funds:	70.8	66.9	40.0	106.9

Sub Program: HIA-1-3 SLI Papago Park Museum

Fund: AA1000 General Fund

Appropriated

Personal Services	244.7	-	70.0	70.0
Employee Related Expenditures	122.2	-	30.0	30.0
Subtotal Personal Services and ERE	366.9	-	100.0	100.0
Professional & Outside Services	-	-	-	-
Travel In-State	0.0	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	201.0	572.6	-	572.6
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	567.9	572.6	100.0	672.6
General Fund Total:	567.9	572.6	100.0	672.6

Fund: HI2025 Donations Fund

Non-Appropriated

Personal Services	28.0	-	-	-
Employee Related Expenditures	12.6	-	-	-
Subtotal Personal Services and ERE	40.6	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	0.0	-	-	-
Travel Out-Of-State	-	-	-	-

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

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-3 SLI Papago Park Museum				
Fund: HI2025 Donations Fund				
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	30.6	-	-	-
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	71.3	-	-	-
Donations Fund Total:	71.3	-	-	-

Fund: HI2900 Permanent AZ Historical Society Revolving Fund

Non-Appropriated

Personal Services	39.0	-	-	-
Employee Related Expenditures	21.1	-	-	-
Subtotal Personal Services and ERE	60.1	-	-	-
Professional & Outside Services	5.6	-	-	-
Travel In-State	-	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	203.6	-	-	-
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	269.4	-	-	-
Permanent AZ Historical Society Revolving Fund Total:	269.4	-	-	-
Sub Program Total for Select Funds:	908.6	572.6	100.0	672.6

Sub Program: HIA-1-5 SLI Flagstaff Pioneer Museum

Fund: AA1000 General Fund

Appropriated

Personal Services	-	-	-	-
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Program Budget Unit Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-5 SLI Flagstaff Pioneer Museum				
Fund: AA1000 General Fund				
Employee Related Expenditures	-	-	-	-
Subtotal Personal Services and ERE	-	-	-	-
Professional & Outside Services	-	-	-	-
Travel In-State	-	-	-	-
Travel Out-Of-State	-	-	-	-
Aid To Organizations & Individuals	-	-	-	-
Other Operating Expenditures	-	1,079.1	-	1,079.1
Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:	-	1,079.1	-	1,079.1
General Fund Total:	-	1,079.1	-	1,079.1
Sub Program Total for Select Funds:	-	1,079.1	-	1,079.1

Program Summary of Expenditure and Budget Request

Agency: Arizona Historical Society

Program: Arizona Historical Society

Program Summary		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
HIA-1-1	Arizona Historical Society	3,114.8	2,394.9	635.5	3,030.4
HIA-1-2	SLI Field Services and Grants	70.8	66.9	40.0	106.9
HIA-1-3	SLI Papago Park Museum	908.6	572.6	100.0	672.6
HIA-1-5	SLI Flagstaff Pioneer Museum	-	1,079.1	-	1,079.1
Arizona Historical Society Summary Total:		4,094.2	4,113.5	775.5	4,889.0

Expenditure Categories		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
FTE	FTE	54.9	54.9	-	54.9
6000	Personal Services	1,844.3	1,296.7	217.1	1,513.8
6100	Employee Related Expenditures	755.9	642.4	93.4	735.8
Subtotal Personal Services and ERE		2,600.2	1,939.1	310.5	2,249.6
6200	Professional & Outside Services	30.3	0.8	-	0.8
6500	Travel In-State	25.6	5.3	15.0	20.3
6600	Travel Out-Of-State	7.1	1.8	-	1.8
6800	Aid To Organizations & Individuals	75.2	66.9	40.0	106.9
7000	Other Operating Expenditures	1,341.5	2,099.6	410.0	2,509.6
8500	Non-Capital Equipment	14.3	-	-	-
Expenditure Categories Total:		4,094.2	4,113.5	775.5	4,889.0

Fund Source		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Appropriated Funds					
AA1000	General Fund (Appropriated)	2,975.9	4,113.5	775.5	4,889.0
Appropriated Funds Total:		2,975.9	4,113.5	775.5	4,889.0
Non-Appropriated Funds					
HI2000	Federal Grants Fund (Non-Appropriated)	2.3	-	-	-
HI2025	Donations Fund (Non-Appropriated)	385.7	-	-	-
HI2125	Historical Society Preservation/Restoration Fund (Non-Appropriated)	20.3	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	710.1	-	-	-
Non-Appropriated Funds Total:		1,118.3	-	-	-
Arizona Historical Society Summary Total:		4,094.2	4,113.5	775.5	4,889.0

Program Summary of Expenditure and Budget Request for Selected Funds

Agency:	Arizona Historical Society
Program:	Arizona Historical Society
Fund:	AA1000 General Fund (Appropriated)

Program Expenditures		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
HIA-1-1	Arizona Historical Society	2,343.8	2,394.9	635.5	3,030.4
HIA-1-2	SLI Field Services and Grants	64.3	66.9	40.0	106.9
HIA-1-3	SLI Papago Park Museum	567.9	572.6	100.0	672.6
HIA-1-5	SLI Flagstaff Pioneer Museum	-	1,079.1	-	1,079.1
General Fund (Appropriated) Summary Total:		2,975.9	4,113.5	775.5	4,889.0
Appropriated Funding					
6000	Personal Services	1,663.5	1,296.7	217.1	1,513.8
6100	Employee Related Expenditures	677.0	642.4	93.4	735.8
Subtotal Personal Services and ERE		2,340.4	1,939.1	310.5	2,249.6
6200	Professional & Outside Services	(0.1)	0.8	-	0.8
6500	Travel In-State	4.1	5.3	15.0	20.3
6600	Travel Out-Of-State	-	1.8	-	1.8
6800	Aid To Organizations & Individuals	48.6	66.9	40.0	106.9
7000	Other Operating Expenditures	582.9	2,099.6	410.0	2,509.6
8500	Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:		2,975.9	4,113.5	775.5	4,889.0
Fund AA1000 - A Total:		2,975.9	4,113.5	775.5	4,889.0

Program Summary of Expenditure and Budget Request for Selected Funds

Agency:	Arizona Historical Society
Program:	Arizona Historical Society
Fund:	HI2000 Federal Grants Fund (Non-Appropriated)

Program Expenditures		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
HIA-1-2	SLI Field Services and Grants	2.3	-	-	-
	Federal Grants Fund (Non-Appropriated) Summary Total:	2.3	-	-	-
Non-Appropriated Funding					
6000	Personal Services	-	-	-	-
6100	Employee Related Expenditures	-	-	-	-
	Subtotal Personal Services and ERE	-	-	-	-
6200	Professional & Outside Services	-	-	-	-
6500	Travel In-State	-	-	-	-
6600	Travel Out-Of-State	-	-	-	-
6800	Aid To Organizations & Individuals	-	-	-	-
7000	Other Operating Expenditures	2.3	-	-	-
8500	Non-Capital Equipment	-	-	-	-
	Expenditure Categories Total:	2.3	-	-	-
	Fund HI2000 - N Total:	2.3	-	-	-

Program Summary of Expenditure and Budget Request for Selected Funds

Agency:	Arizona Historical Society
Program:	Arizona Historical Society
Fund:	HI2025 Donations Fund (Non-Appropriated)

Program Expenditures		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
HIA-1-1	Arizona Historical Society	310.1	-	-	-
HIA-1-2	SLI Field Services and Grants	4.2	-	-	-
HIA-1-3	SLI Papago Park Museum	71.3	-	-	-
Donations Fund (Non-Appropriated) Summary Total:		385.7	-	-	-
Non-Appropriated Funding					
6000	Personal Services	32.7	-	-	-
6100	Employee Related Expenditures	14.8	-	-	-
Subtotal Personal Services and ERE		47.5	-	-	-
6200	Professional & Outside Services	24.5	-	-	-
6500	Travel In-State	20.1	-	-	-
6600	Travel Out-Of-State	7.1	-	-	-
6800	Aid To Organizations & Individuals	26.6	-	-	-
7000	Other Operating Expenditures	245.6	-	-	-
8500	Non-Capital Equipment	14.3	-	-	-
Expenditure Categories Total:		385.7	-	-	-
Fund HI2025 - N Total:		385.7	-	-	-

Program Summary of Expenditure and Budget Request for Selected Funds

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

Program Expenditures		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
HIA-1-1	Arizona Historical Society	20.3	-	-	-
	Historical Society Preservation/Restoration Fund (Non-Appropriated) Summary Total:	20.3	-	-	-
Non-Appropriated Funding					
6000	Personal Services	-	-	-	-
6100	Employee Related Expenditures	-	-	-	-
	Subtotal Personal Services and ERE	-	-	-	-
6200	Professional & Outside Services	-	-	-	-
6500	Travel In-State	-	-	-	-
6600	Travel Out-Of-State	-	-	-	-
6800	Aid To Organizations & Individuals	-	-	-	-
7000	Other Operating Expenditures	20.3	-	-	-
8500	Non-Capital Equipment	-	-	-	-
	Expenditure Categories Total:	20.3	-	-	-
	Fund HI2125 - N Total:	20.3	-	-	-

Program Summary of Expenditure and Budget Request for Selected Funds

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

Program Expenditures		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
HIA-1-1	Arizona Historical Society	440.7	-	-	-
HIA-1-3	SLI Papago Park Museum	269.4	-	-	-
Permanent AZ Historical Society Revolving Fund (Non-Appropriated) Summary Total:		710.1	-	-	-
Non-Appropriated Funding					
6000	Personal Services	148.1	-	-	-
6100	Employee Related Expenditures	64.1	-	-	-
Subtotal Personal Services and ERE		212.3	-	-	-
6200	Professional & Outside Services	5.8	-	-	-
6500	Travel In-State	1.4	-	-	-
6600	Travel Out-Of-State	-	-	-	-
6800	Aid To Organizations & Individuals	-	-	-	-
7000	Other Operating Expenditures	490.5	-	-	-
8500	Non-Capital Equipment	-	-	-	-
Expenditure Categories Total:		710.1	-	-	-
Fund HI2900 - N Total:		710.1	-	-	-
Arizona Historical Society Total:		4,094.2	4,113.5	775.5	4,889.0

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				

FTE

FTE	54.9	54.9	-	54.9
Expenditure Category Total:	-	-	-	-

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	54.9	54.9	-	54.9
	Appropriated Funds Total:	54.9	54.9	-	54.9
	Fund Source Total:	54.9	54.9	-	54.9

Personal Services

Personal Services	1,844.3	1,296.7	217.1	1,513.8
Expenditure Category Total:	1,844.3	1,296.7	217.1	1,513.8

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	1,663.5	1,296.7	217.1	1,513.8
	Appropriated Funds Total:	1,663.5	1,296.7	217.1	1,513.8

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	32.7	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	148.1	-	-	-
	Non-Appropriated Funds Total:	180.8	-	-	-
	Fund Source Total:	1,844.3	1,296.7	217.1	1,513.8

Employee Related Expenditures

Employee Related Expenses	-	642.4	93.4	735.8
FICA Taxes	134.5	-	-	-
Medical Insurance	374.3	-	-	-
Basic Life	0.2	-	-	-
Long-Term Disability (ASRS)	2.2	-	-	-
Dental Insurance	2.4	-	-	-
Workers' Compensation	13.2	-	-	-
Arizona State Retirement System	176.2	-	-	-
Alternate Retirement Contributions – Reemployed Retirees	18.5	-	-	-

Program Expenditure Schedule

Agency: Arizona Historical Society

		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society					
	Personnel Board Pro-Rata Charges	15.9	-	-	-
	Information Technology Pro Rata Charge	11.3	-	-	-
	Accumulated Sick Leave Fund Charge	7.3	-	-	-
	Expenditure Category Total:	755.9	642.4	93.4	735.8
Fund Source					
Appropriated Funds					
AA1000	General Fund (Appropriated)	677.0	642.4	93.4	735.8
	Appropriated Funds Total:	677.0	642.4	93.4	735.8
Non-Appropriated Funds					
HI2025	Donations Fund (Non-Appropriated)	14.8	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	64.1	-	-	-
	Non-Appropriated Funds Total:	79.0	-	-	-
	Fund Source Total:	755.9	642.4	93.4	735.8
Professional & Outside Services					
	Professional and Outside Services	-	0.8	-	0.8
	Attorney General Legal Services	0.7	-	-	-
	Vendor Travel – Tax Reportable	11.9	-	-	-
	Other Professional & Outside Services	17.7	-	-	-
	Expenditure Category Total:	30.3	0.8	-	0.8
Fund Source					
Appropriated Funds					
AA1000	General Fund (Appropriated)	(0.1)	0.8	-	0.8
	Appropriated Funds Total:	(0.1)	0.8	-	0.8
Non-Appropriated Funds					
HI2025	Donations Fund (Non-Appropriated)	24.5	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	5.8	-	-	-
	Non-Appropriated Funds Total:	30.4	-	-	-
	Fund Source Total:	30.3	0.8	-	0.8
Travel In-State					
	Travel In-State	-	5.3	15.0	20.3
	Mileage - Private Vehicle	2.2	-	-	-

Program Expenditure Schedule

Agency: Arizona Historical Society

	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Car Rental In-State	0.5	-	-	-
Lodging	18.5	-	-	-
Meals with Overnight Stay	3.6	-	-	-
Meals without Overnight Stay	0.6	-	-	-
Other Miscellaneous In- State Travel	0.2	-	-	-
Expenditure Category Total:	25.6	5.3	15.0	20.3

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	4.1	5.3	15.0	20.3
	Appropriated Funds Total:	4.1	5.3	15.0	20.3

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	20.1	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	1.4	-	-	-
	Non-Appropriated Funds Total:	21.5	-	-	-
	Fund Source Total:	25.6	5.3	15.0	20.3

Travel Out-Of-State

Travel Out of State	-	1.8	-	1.8
Airfare and Other Common Carrier Charges	2.0	-	-	-
Car Rental Out-of-State	0.4	-	-	-
Lodging Out-of-State	1.9	-	-	-
Meals with Overnight Stay	1.8	-	-	-
Other Miscellaneous Out-of- State Travel	1.1	-	-	-
Expenditure Category Total:	7.1	1.8	-	1.8

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	-	1.8	-	1.8
	Appropriated Funds Total:	-	1.8	-	1.8

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	7.1	-	-	-
	Non-Appropriated Funds Total:	7.1	-	-	-
	Fund Source Total:	7.1	1.8	-	1.8

Program Expenditure Schedule

Agency: Arizona Historical Society

		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society					
Aid To Organizations & Individuals					
	Aid to Organizations and Individuals	-	66.9	40.0	106.9
	Aid to Other Organizations	75.2	-	-	-
	Expenditure Category Total:	75.2	66.9	40.0	106.9
Fund Source					
Appropriated Funds					
AA1000	General Fund (Appropriated)	48.6	66.9	40.0	106.9
	Appropriated Funds Total:	48.6	66.9	40.0	106.9
Non-Appropriated Funds					
HI2025	Donations Fund (Non-Appropriated)	26.6	-	-	-
	Non-Appropriated Funds Total:	26.6	-	-	-
	Fund Source Total:	75.2	66.9	40.0	106.9
Other Operating Expenditures					
	Other Operating Expenses	-	2,099.6	410.0	2,509.6
	Risk Management Charges to State Agencies	53.2	-	-	-
	Other External Computer Processing, Hosting, Maintenance and Support Costs	4.5	-	-	-
	Charges Imposed Related to AFIS.	13.3	-	-	-
	External Telecommunications Charges	131.4	-	-	-
	Electricity	312.4	-	-	-
	Sanitation Waste Disposal	20.2	-	-	-
	Water	38.4	-	-	-
	Gas & Fuel Oil for Buildings	22.0	-	-	-
	Rental of Other Machinery & Equipment	23.5	-	-	-
	Miscellaneous Rent	19.9	-	-	-
	Late Charges on Overdue Payments	23.2	-	-	-
	Internal Accounting, Budgeting & Financial Services	33.9	-	-	-
	Repair & Maintenance - Buildings	173.0	-	-	-
	Repair & Maintenance - Vehicles	23.6	-	-	-
	Repair & Maintenance - Computer Equipment	13.9	-	-	-
	Repair & Maintenance - Other Equipment	7.1	-	-	-
	Repair & Maintenance - Other	200.1	-	-	-

Program Expenditure Schedule

Agency: Arizona Historical Society

		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society					
	Software Support, Maintenance Short-term Licensing	18.6	-	-	-
	Office Supplies	5.6	-	-	-
	Housekeeping Supplies	9.2	-	-	-
	Repair & Maintenance Supplies - Neither Automotive Nor Related to Buildings	4.1	-	-	-
	Other Operating Supplies	14.4	-	-	-
	Other Resale Supplies	12.0	-	-	-
	Conference Registration / Attendance Fees	7.8	-	-	-
	Advertising	13.4	-	-	-
	External Printing	63.0	-	-	-
	Photography	0.5	-	-	-
	Postage & Delivery	36.3	-	-	-
	Awards	1.7	-	-	-
	Entertainment & Promotional Items	2.4	-	-	-
	Dues	13.1	-	-	-
	Books, Subscriptions & Publications	18.1	-	-	-
	Security Services	1.7	-	-	-
	Other Miscellaneous Operating	6.1	-	-	-
	Expenditure Category Total:	1,341.5	2,099.6	410.0	2,509.6
Fund Source					
Appropriated Funds					
AA1000	General Fund (Appropriated)	582.9	2,099.6	410.0	2,509.6
	Appropriated Funds Total:	582.9	2,099.6	410.0	2,509.6
Non-Appropriated Funds					
HI2000	Federal Grants Fund (Non-Appropriated)	2.3	-	-	-
HI2025	Donations Fund (Non-Appropriated)	245.6	-	-	-
HI2125	Historical Society Preservation/Restoration Fund (Non-Appropriated)	20.3	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	490.5	-	-	-
	Non-Appropriated Funds Total:	758.7	-	-	-
	Fund Source Total:	1,341.5	2,099.6	410.0	2,509.6
Non-Capital Equipment					
	Purchased or licensed software / website	14.3	-	-	-

Program Expenditure Schedule

Agency:	Arizona Historical Society
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		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:	HIA-1-0 Arizona Historical Society				
	Expenditure Category Total:	14.3	-	-	-
	Fund Source				
	Non-Appropriated Funds				
HI2025	Donations Fund (Non-Appropriated)	14.3	-	-	-
	Non-Appropriated Funds Total:	14.3	-	-	-
	Fund Source Total:	14.3	-	-	-

Employee Retirement Coverage

Retirement System	FTE	Personal Services	Fund#
Arizona State Retirement System	54.9	1,296.7	AA1000-A

Sub Program:	HIA-1-1 Arizona Historical Society
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	FTE				
	FTE	44.4	54.9	-	54.9
	Expenditure Category Total:	-	-	-	-
	Fund Source				
	Appropriated Funds				
AA1000	General Fund (Appropriated)	44.4	54.9	-	54.9
	Appropriated Funds Total:	44.4	54.9	-	54.9
	Fund Source Total:	44.4	54.9	-	54.9

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-1 Arizona Historical Society				
Personal Services				
Personal Services	1,508.8	1,296.7	147.1	1,443.8
Expenditure Category Total:	1,508.8	1,296.7	147.1	1,443.8
Fund Source				
Appropriated Funds				
AA1000 General Fund (Appropriated)	1,395.0	1,296.7	147.1	1,443.8
Appropriated Funds Total:	1,395.0	1,296.7	147.1	1,443.8
Non-Appropriated Funds				
HI2025 Donations Fund (Non-Appropriated)	4.7	-	-	-
HI2900 Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	109.1	-	-	-
Non-Appropriated Funds Total:	113.7	-	-	-
Fund Source Total:	1,508.8	1,296.7	147.1	1,443.8

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-1 Arizona Historical Society				
Employee Related Expenditures				

Employee Related Expenses	-	642.4	63.4	705.8
FICA Taxes	109.5	-	-	-
Medical Insurance	282.7	-	-	-
Basic Life	0.2	-	-	-
Long-Term Disability (ASRS)	1.7	-	-	-
Dental Insurance	1.8	-	-	-
Workers' Compensation	10.8	-	-	-
Arizona State Retirement System	139.8	-	-	-
Alternate Retirement Contributions – Reemployed Retirees	18.5	-	-	-
Personnel Board Pro-Rata Charges	12.9	-	-	-
Information Technology Pro Rata Charge	9.2	-	-	-
Accumulated Sick Leave Fund Charge	5.9	-	-	-
Expenditure Category Total:	593.0	642.4	63.4	705.8

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	547.7	642.4	63.4	705.8
	Appropriated Funds Total:	547.7	642.4	63.4	705.8

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	2.2	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	43.1	-	-	-
	Non-Appropriated Funds Total:	45.3	-	-	-
	Fund Source Total:	593.0	642.4	63.4	705.8

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-1 Arizona Historical Society				
Professional & Outside Services				
Professional and Outside Services	-	0.8	-	0.8
Attorney General Legal Services	0.7	-	-	-
Vendor Travel – Tax Reportable	11.9	-	-	-
Other Professional & Outside Services	12.0	-	-	-
Expenditure Category Total:	24.6	0.8	-	0.8
Fund Source				
Appropriated Funds				
AA1000 General Fund (Appropriated)	(0.1)	0.8	-	0.8
Appropriated Funds Total:	(0.1)	0.8	-	0.8
Non-Appropriated Funds				
HI2025 Donations Fund (Non-Appropriated)	24.5	-	-	-
HI2900 Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	0.2	-	-	-
Non-Appropriated Funds Total:	24.7	-	-	-
Fund Source Total:	24.6	0.8	-	0.8

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-1 Arizona Historical Society				
Travel In-State				
Travel In-State	-	5.3	15.0	20.3
Mileage - Private Vehicle	2.2	-	-	-
Car Rental In-State	0.5	-	-	-
Lodging	18.1	-	-	-
Meals with Overnight Stay	3.3	-	-	-
Meals without Overnight Stay	0.5	-	-	-
Other Miscellaneous In- State Travel	0.2	-	-	-
Expenditure Category Total:	24.8	5.3	15.0	20.3
Fund Source				
Appropriated Funds				
AA1000 General Fund (Appropriated)	4.1	5.3	15.0	20.3
Appropriated Funds Total:	4.1	5.3	15.0	20.3
Non-Appropriated Funds				
HI2025 Donations Fund (Non-Appropriated)	19.3	-	-	-
HI2900 Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	1.4	-	-	-
Non-Appropriated Funds Total:	20.7	-	-	-
Fund Source Total:	24.8	5.3	15.0	20.3

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-1 Arizona Historical Society				
Travel Out-Of-State				
Travel Out of State	-	1.8	-	1.8
Airfare and Other Common Carrier Charges	2.0	-	-	-
Car Rental Out-of-State	0.4	-	-	-
Lodging Out-of-State	1.9	-	-	-
Meals with Overnight Stay	1.8	-	-	-
Other Miscellaneous Out-of- State Travel	1.1	-	-	-
Expenditure Category Total:	7.1	1.8	-	1.8

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	-	1.8	-	1.8
	Appropriated Funds Total:	-	1.8	-	1.8

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	7.1	-	-	-
	Non-Appropriated Funds Total:	7.1	-	-	-
	Fund Source Total:	7.1	1.8	-	1.8

Aid To Organizations & Individuals

	Aid to Other Organizations	41.7	-	-	-
	Expenditure Category Total:	41.7	-	-	-

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	15.1	-	-	-
	Appropriated Funds Total:	15.1	-	-	-

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	26.6	-	-	-
	Non-Appropriated Funds Total:	26.6	-	-	-
	Fund Source Total:	41.7	-	-	-

Other Operating Expenditures

	Other Operating Expenses	-	447.9	410.0	857.9
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Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-1 Arizona Historical Society				
Risk Management Charges to State Agencies	31.9	-	-	-
Other External Computer Processing, Hosting, Maintenance and Support Costs	4.5	-	-	-
Charges Imposed Related to AFIS.	8.0	-	-	-
External Telecommunications Charges	86.4	-	-	-
Electricity	169.1	-	-	-
Sanitation Waste Disposal	5.8	-	-	-
Water	21.8	-	-	-
Gas & Fuel Oil for Buildings	19.4	-	-	-
Rental of Other Machinery & Equipment	22.2	-	-	-
Miscellaneous Rent	17.1	-	-	-
Late Charges on Overdue Payments	23.1	-	-	-
Internal Accounting, Budgeting & Financial Services	33.9	-	-	-
Repair & Maintenance - Buildings	148.3	-	-	-
Repair & Maintenance - Vehicles	12.6	-	-	-
Repair & Maintenance - Computer Equipment	9.3	-	-	-
Repair & Maintenance - Other Equipment	7.1	-	-	-
Repair & Maintenance - Other	97.0	-	-	-
Software Support, Maintenance Short-term Licensing	16.3	-	-	-
Office Supplies	3.7	-	-	-
Housekeeping Supplies	3.6	-	-	-
Repair & Maintenance Supplies - Neither Automotive Nor Related to Buildings	3.5	-	-	-
Other Operating Supplies	10.6	-	-	-
Other Resale Supplies	(13.3)	-	-	-
Conference Registration / Attendance Fees	7.6	-	-	-
Advertising	13.4	-	-	-
External Printing	63.0	-	-	-
Photography	0.5	-	-	-
Postage & Delivery	35.9	-	-	-
Awards	1.7	-	-	-
Entertainment & Promotional Items	1.8	-	-	-

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-1 Arizona Historical Society				
Dues	11.7	-	-	-
Books, Subscriptions & Publications	17.5	-	-	-
Security Services	0.5	-	-	-
Other Miscellaneous Operating	4.9	-	-	-
Expenditure Category Total:	900.5	447.9	410.0	857.9

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	381.9	447.9	410.0	857.9
	Appropriated Funds Total:	381.9	447.9	410.0	857.9

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	211.4	-	-	-
HI2125	Historical Society Preservation/Restoration Fund (Non-Appropriated)	20.3	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	286.9	-	-	-
	Non-Appropriated Funds Total:	518.6	-	-	-
	Fund Source Total:	900.5	447.9	410.0	857.9

Non-Capital Equipment

Purchased or licensed software / website	14.3	-	-	-
Expenditure Category Total:	14.3	-	-	-

Fund Source

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	14.3	-	-	-
	Non-Appropriated Funds Total:	14.3	-	-	-
	Fund Source Total:	14.3	-	-	-

Employee Retirement Coverage

Retirement System	FTE	Personal Services	Fund#
Arizona State Retirement System	54.9	54.9	AA1000-A
Sub Program: HIA-1-2 SLI Field Services and Grants			

Program Expenditure Schedule

Agency:	Arizona Historical Society
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		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:	HIA-1-0 Arizona Historical Society				
Sub Program:	HIA-1-2 SLI Field Services and Grants				
FTE					
FTE		0.5	-	-	-
	Expenditure Category Total:	-	-	-	-
Fund Source					
Appropriated Funds					
AA1000	General Fund (Appropriated)	0.5	-	-	-
	Appropriated Funds Total:	0.5	-	-	-
	Fund Source Total:	0.5	-	-	-
Personal Services					
Personal Services		23.8	-	-	-
	Expenditure Category Total:	23.8	-	-	-
Fund Source					
Appropriated Funds					
AA1000	General Fund (Appropriated)	23.8	-	-	-
	Appropriated Funds Total:	23.8	-	-	-
	Fund Source Total:	23.8	-	-	-

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-2 SLI Field Services and Grants				
Employee Related Expenditures				
FICA Taxes	1.8	-	-	-
Medical Insurance	1.7	-	-	-
Basic Life	0.0	-	-	-
Long-Term Disability (ASRS)	0.0	-	-	-
Dental Insurance	0.1	-	-	-
Workers' Compensation	0.2	-	-	-
Arizona State Retirement System	2.9	-	-	-
Personnel Board Pro-Rata Charges	0.2	-	-	-
Information Technology Pro Rata Charge	0.1	-	-	-
Accumulated Sick Leave Fund Charge	0.1	-	-	-
Expenditure Category Total:	7.0	-	-	-
Fund Source				
Appropriated Funds				
AA1000 General Fund (Appropriated)	7.0	-	-	-
Appropriated Funds Total:	7.0	-	-	-
Fund Source Total:	7.0	-	-	-
Travel In-State				
Lodging	0.5	-	-	-
Meals with Overnight Stay	0.3	-	-	-
Expenditure Category Total:	0.7	-	-	-
Fund Source				
Non-Appropriated Funds				
HI2025 Donations Fund (Non-Appropriated)	0.7	-	-	-
Non-Appropriated Funds Total:	0.7	-	-	-
Fund Source Total:	0.7	-	-	-

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-2 SLI Field Services and Grants				
Aid To Organizations & Individuals				
Aid to Organizations and Individuals	-	66.9	40.0	106.9
Aid to Other Organizations	33.5	-	-	-
Expenditure Category Total:	33.5	66.9	40.0	106.9

Fund Source				
Appropriated Funds				
AA1000 General Fund (Appropriated)	33.5	66.9	40.0	106.9
Appropriated Funds Total:	33.5	66.9	40.0	106.9
Fund Source Total:	33.5	66.9	40.0	106.9

Other Operating Expenditures				
Repair & Maintenance - Other	2.7	-	-	-
Other Operating Supplies	2.3	-	-	-
Postage & Delivery	0.1	-	-	-
Entertainment & Promotional Items	0.6	-	-	-
Other Miscellaneous Operating	0.0	-	-	-
Expenditure Category Total:	5.8	-	-	-

Fund Source				
Non-Appropriated Funds				
HI2000 Federal Grants Fund (Non-Appropriated)	2.3	-	-	-
HI2025 Donations Fund (Non-Appropriated)	3.5	-	-	-
Non-Appropriated Funds Total:	5.8	-	-	-
Fund Source Total:	5.8	-	-	-

Employee Retirement Coverage			
Retirement System	FTE	Personal Services	Fund#
	-	-	

Sub Program: HIA-1-3 SLI Papago Park Museum
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Program Expenditure Schedule

Agency:	Arizona Historical Society
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		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:	HIA-1-0 Arizona Historical Society				
Sub Program:	HIA-1-3 SLI Papago Park Museum				
FTE					
FTE		10.0	-	-	-
Expenditure Category Total:		-	-	-	-
Fund Source					
Appropriated Funds					
AA1000 General Fund (Appropriated)		10.0	-	-	-
Appropriated Funds Total:		10.0	-	-	-
Fund Source Total:		10.0	-	-	-
Personal Services					
Personal Services		311.7	-	70.0	70.0
Expenditure Category Total:		311.7	-	70.0	70.0
Fund Source					
Appropriated Funds					
AA1000 General Fund (Appropriated)		244.7	-	70.0	70.0
Appropriated Funds Total:		244.7	-	70.0	70.0
Non-Appropriated Funds					
HI2025 Donations Fund (Non-Appropriated)		28.0	-	-	-
HI2900 Permanent AZ Historical Society Revolving Fund (Non-Appropriated)		39.0	-	-	-
Non-Appropriated Funds Total:		67.1	-	-	-
Fund Source Total:		311.7	-	70.0	70.0

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-3 SLI Papago Park Museum				
Employee Related Expenditures				

Employee Related Expenses	-	-	30.0	30.0
FICA Taxes	23.2	-	-	-
Medical Insurance	89.9	-	-	-
Basic Life	0.0	-	-	-
Long-Term Disability (ASRS)	0.4	-	-	-
Dental Insurance	0.6	-	-	-
Workers' Compensation	2.2	-	-	-
Arizona State Retirement System	33.6	-	-	-
Personnel Board Pro-Rata Charges	2.7	-	-	-
Information Technology Pro Rata Charge	1.9	-	-	-
Accumulated Sick Leave Fund Charge	1.3	-	-	-
Expenditure Category Total:	155.9	-	30.0	30.0

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	122.2	-	30.0	30.0
	Appropriated Funds Total:	122.2	-	30.0	30.0

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	12.6	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	21.1	-	-	-
	Non-Appropriated Funds Total:	33.7	-	-	-
	Fund Source Total:	155.9	-	30.0	30.0

Program Expenditure Schedule

Agency:	Arizona Historical Society
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		FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program:	HIA-1-0 Arizona Historical Society				
Sub Program:	HIA-1-3 SLI Papago Park Museum				
Professional & Outside Services					
	Other Professional & Outside Services	5.6	-	-	-
	Expenditure Category Total:	5.6	-	-	-
Fund Source					
Non-Appropriated Funds					
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	5.6	-	-	-
	Non-Appropriated Funds Total:	5.6	-	-	-
	Fund Source Total:	5.6	-	-	-
Travel In-State					
	Car Rental In-State	0.0	-	-	-
	Meals without Overnight Stay	0.0	-	-	-
	Expenditure Category Total:	0.1	-	-	-
Fund Source					
Appropriated Funds					
AA1000	General Fund (Appropriated)	0.0	-	-	-
	Appropriated Funds Total:	0.0	-	-	-
Non-Appropriated Funds					
HI2025	Donations Fund (Non-Appropriated)	0.0	-	-	-
	Non-Appropriated Funds Total:	0.0	-	-	-
	Fund Source Total:	0.1	-	-	-
Other Operating Expenditures					
	Other Operating Expenses	-	572.6	-	572.6
	Risk Management Charges to State Agencies	21.3	-	-	-
	Charges Imposed Related to AFIS.	5.3	-	-	-
	External Telecommunications Charges	45.0	-	-	-
	Electricity	143.4	-	-	-
	Sanitation Waste Disposal	14.4	-	-	-
	Water	16.6	-	-	-
	Gas & Fuel Oil for Buildings	2.6	-	-	-

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-3 SLI Papago Park Museum				
Rental of Other Machinery & Equipment	1.3	-	-	-
Miscellaneous Rent	2.8	-	-	-
Late Charges on Overdue Payments	0.0	-	-	-
Repair & Maintenance - Buildings	24.7	-	-	-
Repair & Maintenance - Vehicles	11.0	-	-	-
Repair & Maintenance - Computer Equipment	4.6	-	-	-
Repair & Maintenance - Other	100.3	-	-	-
Software Support, Maintenance Short-term Licensing	2.3	-	-	-
Office Supplies	1.9	-	-	-
Housekeeping Supplies	5.6	-	-	-
Repair & Maintenance Supplies - Neither Automotive Nor Related to Buildings	0.6	-	-	-
Other Operating Supplies	1.5	-	-	-
Other Resale Supplies	25.3	-	-	-
Conference Registration / Attendance Fees	0.2	-	-	-
Postage & Delivery	0.3	-	-	-
Dues	1.4	-	-	-
Books, Subscriptions & Publications	0.6	-	-	-
Security Services	1.2	-	-	-
Other Miscellaneous Operating	1.2	-	-	-
Expenditure Category Total:	435.3	572.6	-	572.6

Fund Source

Appropriated Funds

AA1000	General Fund (Appropriated)	201.0	572.6	-	572.6
Appropriated Funds Total:		201.0	572.6	-	572.6

Non-Appropriated Funds

HI2025	Donations Fund (Non-Appropriated)	30.6	-	-	-
HI2900	Permanent AZ Historical Society Revolving Fund (Non-Appropriated)	203.6	-	-	-
Non-Appropriated Funds Total:		234.3	-	-	-
Fund Source Total:		435.3	572.6	-	572.6

Employee Retirement Coverage

Program Expenditure Schedule

Agency:	Arizona Historical Society
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	FY 2025 Actuals	FY 2026 Expenditure Plan	FY 2027 Funding Issue	FY 2027 Total Request
Program: HIA-1-0 Arizona Historical Society				
Sub Program: HIA-1-3 SLI Papago Park Museum				

Retirement System	FTE	Personal Services	Fund#
	-	-	
Sub Program: HIA-1-5 SLI Flagstaff Pioneer Museum			

Other Operating Expenditures				
Other Operating Expenses	-	1,079.1	-	1,079.1
Expenditure Category Total:	-	1,079.1	-	1,079.1
Fund Source				
Appropriated Funds				
AA1000 General Fund (Appropriated)	-	1,079.1	-	1,079.1
Appropriated Funds Total:	-	1,079.1	-	1,079.1
Fund Source Total:	-	1,079.1	-	1,079.1

Employee Retirement Coverage			
Retirement System	FTE	Personal Services	Fund#

Program Expenditure Schedule

Agency: Arizona Historical Society

Administrative Costs Summary

FY 2027

Personal Services

40.3

ERE

26.9

Administrative Costs Total:

67.2

Administrative Costs / Total Expenditure Ratio

Request

Admin %

FY 2027

4,889.0

1.4%

Funding Issue List

Agency: Arizona Historical Society

FY 2026

Priority	Funding Issue Title	Total FTE	Total Amount	General Fund	Other Appropriated Funds	Non- Appropriated Funds
1	IT Subscriptions and Hardware	-	50.0	50.0	-	-
Total:		-	50.0	50.0	-	-

Funding Issue Detail

Agency: Arizona Historical Society

Issue: 1 IT Subscriptions and Hardware

Program: Arizona Historical Society
Fund: AA1000 General Fund (Appropriated)

Expenditure Categories		FY 2026
7000	Other Operating Expenditures	50.0
Program/Fund Total:		50.0

Funding Issue Narrative

Agency: Arizona Historical Society

Issue: 1 IT Subscriptions and Hardware

Description of Issue: The Arizona Historical Society maintains a number of unique software subscriptions, operating on proprietary licenses, to support its industry-specific work in the fields of collections and archival management. Both the current software suites employed by the agency – as well as the hardware systems on which those softwares operate – are insufficient to meet the current and future operational needs of the agency. This insufficiency pertains to both the quantity (database sizes) and quality (file format, sizes, etc) of its managed digital records. To make the best of the tools presently available, many of the agency's operating solutions are ad-hoc and precarious at best. Simple Excel spreadsheets and PDF images, grafted onto a website's back-end, operate in lieu of any dedicated archival database. This has resulted in near-monthly outages of the agency's public website and a general failure to properly add and process new collections, utterly precludes certain types of digital-born archival materials, and limits access to the history of Arizona by its people. Beyond software, much of the essential hardware that is both back-end and revenue-generating (forward-facing) is failing. Clients and contracts are falling off relative to the quality and timeliness of the agency's capacity to meet its archival commitments. Scanner tracks are broken, resulting in the suspension of the agency's high-resolution scanning services. The agency's micrographics center – the only such service still offered by any state agency in fulfillment of state statutes regarding records retention has been closed due to failed technology – for the better part of a year. Existing staff computers are technologically incompatible with the software needed to maintain the agency's digital archives database of over 12 million materials.

The acquisition of new supporting software (with annual subscriptions) and refresh on existing IT hardware systems is required and overdue in order to meet the agency's statutory obligations.

Proposal: \$50,000 increase to "Operating Budget" annual appropriations (FY26-onward). These funds would facilitate the purchase and implementation of new and/or replacement technology (software and supporting hardware) necessary for agency staff to complete their essential, statutory duties.

Alternatives Considered: The software suites currently utilized by the agency – and the new software recommended for appropriations – represent a restricted and limited vendor pool of industry-specific services. The agency conducts regular reviews of comparable programs beyond those already under contract, to ensure fiscal responsibility in their procurement assignment, but has found the differences in pricing with alternative competitors to be negligible – especially when considering the added costs (time, fees, and labor) required to migrate or shift between different systems. For the hardware proposed: while there exists some flexibility over vendors and pricing, the technical requirements for each are specific for based on function and use and likewise inspire a comparatively narrow vendor pool. Due to the significant challenges and obstacles these gaps in technology – software and hardware – represent to the daily functions of the agency, there are no practical substitutes or alternatives to implementing the new technology as proposed. The current, ad-hoc solutions are only temporary and incomplete solutions and set the agency up to fail in its revenue generation goals and statutory obligations.

Impact of Not Funding This Year: A failure to secure additional funding to resolve the above-described technology issues (software and hardware) would have several significant impacts on the agency and its operations. Specifically:

1. Failure to comply with statute AHS is the only agency offering microfilm processing on-contract to other state agencies. Outside inter-agency agreements, there are only a handful of operating microfilm businesses remaining in the private sector.
2. Loss of revenue - failure to repair the agency's micrographics (microfilm) processing center would result in ten of thousands in lost annual revenue.
3. Failure to comply with statute - the agency has an obligation to acquire and properly preserve, catalog, and make available its collections and archival materials. Failure to upgrade and augment existing software and hardware systems results in system outages, inadequate cataloging, and the total incompatibility of existing systems for digital-born acquisitions (e.g. 3D architectural archives, media, oral histories).
4. Loss of revenue - failure to replace the agency's failing scanners will result in lost annual revenue from public digitization orders.
5. Security risk - Preservica offers user security features not currently available to the agency in its existing software suites, such as permissions, access controls, and encryption, to safeguard digital assets from unauthorized access, modification, or loss.

Without these vital technologies, the agency's archives cannot evolve alongside technology, cannot collect digital records, and will fall behind other repositories and national standards.

Funding Issue Supplemental
IT Subscriptions and Hardware

Title in Detail Budget Book:

Operating Budget

Fund Source: General Fund

Proposal:

\$50,000 increase to “Operating Budget” annual appropriations (FY26).

These funds would facilitate the purchase and implementation of new and/or replacement technology (software and supporting hardware) necessary for agency staff to complete their essential, statutory duties.

Description of issue:

The Arizona Historical Society maintains a number of unique software subscriptions, operating on proprietary licenses, to support its industry-specific work in the fields of collections and archival management. Both the current software suites employed by the agency – as well as the hardware systems on which those softwares operate – are insufficient to meet the current and future operational needs of the agency. This insufficiency pertains to both the quantity (database sizes) and quality (file format, sizes, etc) of its managed digital records. To make the best of the tools presently available, many of the agency’s operating solutions are ad-hoc and precarious at best. Simple Excel spreadsheets and PDF images, grafted onto a website’s back-end, operate in lieu of any dedicated archival database. This has resulted in near-monthly outages of the agency’s public website and a general failure to properly add and process new collections, utterly precludes certain types of digital-born archival materials, and limits access to the history of Arizona by its people.

Beyond software, much of the essential hardware that is both back-end and revenue-generating (forward-facing) is failing. Clients and contracts are falling off relative to the quality and timeliness of the agency’s capacity to meet its archival commitments. Scanner tracks are broken, resulting in the suspension of the agency’s high-resolution

scanning services. The agency's micrographics center – the only such service still offered by any state agency in fulfillment of state statutes regarding records retention¹ – has been closed due to failed technology – for the better part of a year. Existing staff computers are technologically incompatible with the software needed to maintain the agency's digital archives database of over 12 million materials.

The acquisition of new supporting software (with annual subscriptions) and refresh on existing IT hardware systems is required and overdue in order to meet the agency's statutory obligations.

	Per Unit Cost	Quantity	Total	Frequency
Hardware: Scanners	\$5,000	2	\$10,000	One-time
Hardware: Laptops/Desktops	\$1,250	6	\$7,500	One-time
Software: Preservica	\$19,670	1	\$19,700	Recurring: Annual
Software: PastPerfect	\$1,600	1	\$1,600	Recurring: Annual
Maintenance: Micrographics	\$6,700	1	\$6,700	Recurring: Annual
Repair: Micrographics	\$450	1	\$4,500	One-time
Totals			\$50,000	

¹ ARS § 39-101 – <https://www.azleg.gov/ars/39/00101.htm>
 ARS § 41-151.16 – <https://law.justia.com/codes/arizona/2015/title-41/section-41-151.16>

Alternatives considered:

The software suites currently utilized by the agency – and the new software recommended for appropriations – represent a restricted and limited vendor pool of industry-specific services. The agency conducts regular reviews of comparable programs beyond those already under contract, to ensure fiscal responsibility in their procurement assignment, but has found the differences in pricing with alternative competitors to be negligible - especially when considering the added costs (time, fees, and labor) required to migrate or shift between different systems. For the hardware proposed: while there exists some flexibility over vendors and pricing, the technical requirements for each are specific for based on function and use and likewise inspire a comparatively narrow vendor pool.

Due to the significant challenges and obstacles these gaps in technology – software and hardware – represent to the daily functions of the agency, there are no practical substitutes or alternatives to implementing the new technology as proposed. The current, ad-hoc solutions are only temporary and incomplete solutions and set the agency up to fail in its revenue generation goals and statutory obligations.

Impact of not funding this year:

A failure to secure additional funding to resolve the above-described technology issues (software and hardware) would have several significant impacts on the agency and its operations. Specifically:

1. Failure to comply with statute² - AHS is the only agency offering microfilm processing on-contract to other state agencies. Outside inter-agency agreements, there are only a handful of operating microfilm businesses remaining in the private sector.
2. Loss of revenue - failure to repair the agency's micrographics (microfilm) processing center would result in tens of thousands in lost annual revenue.
3. Failure to comply with statute³ - the agency has an obligation to acquire and properly preserve, catalog, and make available its collections and archival materials. Failure to upgrade and augment existing software and hardware systems results in system outages, inadequate cataloging, and the total incompatibility of existing systems for digital-born acquisitions (e.g. 3D architectural archives, media, oral histories).

² ARS § 39-101, ARS § 41-151.16

³ ARS § 41-823.A.1-4, ARS § 41-823.B

4. Loss of revenue - failure to replace the agency's failing scanners will result in lost annual revenue from public digitization orders.
5. Security risk - Preservica offers user security features not currently available to the agency in its existing software suites, such as permissions, access controls, and encryption, to safeguard digital assets from unauthorized access, modification, or loss.

Without these vital technologies, the agency's archives cannot evolve alongside technology, cannot collect digital records, and **will** fall behind other repositories and national standards.

Statutory reference:

- ARS § 39-101
- ARS § 41-151.16
- A.R.S. 41-823.A.1-4
- A.R.S. 41-823.B

Equipment to be purchased (if applicable):

This would obligate not only acquisition of new software subscriptions, but the purchase of:

- 6 new laptops and desktops for archival and collections management
- 2 new large flatbed archival scanners

Classification of new positions:

N/A

Annualization(s):

N/A

Alignment with agency's strategic plan or statutory responsibilities:

Per its governing statute, A.R.S. §§41-823, the Arizona Historical Society is charged with the preservation and public accessibility of its historical collections and archives to the people of Arizona and its visitors. Two strategic goals of the agency are to make AHS the most trusted authority on Arizona history, and to enhance its capacity to collect, preserve, interpret, and disseminate Arizona's history. The introduction and implementation of these proposed, new digital systems – with their annual subscription – and their supporting hardware will elevate and enhance the agency's ability to process, manage, and digitally preserve, catalog, and make accessible its collections and archives.⁴

Impact on historically underserved, marginalized, or adversely affected groups:

By making archival materials more accessible, the agency can effectively tell and make available the stories and histories of Arizona's historically underserved, economically limited, or geographically marginalized groups.

With a suitable suite of archival and collections software (supported by new hardware) to publish and support research, historians and researchers are able to produce more inclusive scholarship that recognizes the experiences of these groups, while additionally improving statewide access to those same peoples in a modern setting. This fosters a more comprehensive understanding of history, wherein historically underserved schools and student groups can gain increased access to the experiences and histories of others across the state. Museums, documentaries, exhibitions, and educational programs drawn from archival sources can elevate these histories to wider audiences, promoting understanding and empathy. Examples of this include:

- Digitization and promotion of Japanese-American history archives (specifically Internment) in Arizona during WWII, in alignment with SB-1301 submitted in the 2025 Legislative session by Sen. Kavanagh and Fernandez.
- Records access in support of the Tucson 250th anniversary
- Records access in support of the America 250th celebration
- Records access in support of the 100th anniversary of Route 66.

⁴ These describe over 85,000 objects and 12 million archival materials, including documents, photos, films, oral histories, maps, architectural drawings, etc.

- Statewide archival access to rural schools and students, in support of the Arizona National History Day competition.

How has feedback been incorporated from groups directly impacted by proposal:

The agency's archivists receive recurrent inquiries and comments by researchers, students, and other members of the public concerning the availability and accessibility of its archival collections. The nature of this feedback exists within a range that identifies issues concerning ease of access, breadth and depth of posted (online) resources, and consistency of the up-time of the agency's digital collections and archives. The failure of the agency to adequately address the operational deficiencies presented by these software and hardware shortcomings and failings has resulted in significant displeasure and frustration among staff. This has long-term implications against agency moral and staff retention.

Recent feedback from long-time and repeat patrons of the agency's high-resolution scanning services have expressed their dissatisfaction with the current quality of recent scans performed by the agency. The degradation in quality is a result of the broken and failing tracks on the agency's high-resolution scanners. The agency has had to temporarily suspend its microfilm processing services, which has negatively impacted the records retention efforts of other State agencies.

Description of how this furthers the Governor's priorities:

To effectively lead, a firm understanding of the past is essential. The agency is tasked with preserving Arizona's history for the benefit and betterment of its people. This preservation begins and is sustained through careful and deliberate stewardship. That standard of care is maintained through technology. Software manages the agency's catalog - both internal and public-facing - and, increasingly, preserves digital-born archives representing the photos, videos, and oral histories of Arizona in the late 20th and early 21st centuries. These archives serve the public and satisfy their access to the records and materials of the state's history. Technology - digital catalogs, online hosting, scanners and processing machines - is essential to fulfilling this obligation and promise.



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The purchase of these new and replacement technologies will expand the agency's capacity to effectively catalog, manage, accept, and make increasingly available to the public its archive of over 12 million materials, including documents, photos, films, oral histories, maps, and architectural drawings. These archives serve traditional students and schools through the likes of its Education and Field Trip programs, its statewide National History Day contest (which results in Arizona students competing at a national level with the top students across the United States in Washington, D.C.), as well as through partnerships for on-site student research with the State's universities.

Without the support of new state appropriations, the agency's existing deficiencies in its supporting technology will hurt Arizona's students, researchers, families, and leaders - limiting and effectively cutting them off from their shared past.

If requesting GF, why is it critical to continued operations?

At this moment, the agency's Library & Archives department is at a logjam in its ability to effectively manage its materials and their records. The current mechanism through which the agency manages these records is underpowered to perform the tasks demanded of it from a collection of AHS' size. Additional software and hardware are required to both support the existing systems infrastructure through which the agency currently manages its archival content, and to facilitate the acquisition of new records and their accessibility through online media.

If requesting GF, why can't existing funding fully or partially meet the need?

AHS does not have sufficient funds within its annual budget to accommodate either the one-time or recurring annual payments that this project would obligate. Significant budgetary changes to the agency – updates to revenue goals and reductions in FY24 and FY25, including the closure of one facility and divestiture of three properties – were already implemented to achieve a balanced budget for FY26; an increase of this sort is not possible at this time given those changes already made.

If requesting GF, why can't other funds fully or partially meet the need?

AHS has restricted reserves which it has committed to apply in support of this project. The total cost to repair the agency's micrographics center exceeds the funds requested. The agency continues to absorb into its non-appropriated expenditures (Enterprise funds and Statewide Donations) the costs of other, current software suites

and any annual rate changes, and is elsewhere planning to implement additional (complimentary) software beyond Preservica to support its daily operations.⁵

Enterprise revenue goals for FY26 and FY27 are already budgeted to accommodate known expenses within both years, and still introduce underfunded items within the allocations of both. Any diversion or use of annual operations funds – already-appropriated or Enterprise – would detract from another, existing funding item.

⁵ ContentDM, ArchivesSpace



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Tucson, Arizona 85719
United States

Created Date 4/15/2025
Expiration Date 6/30/2025
Quote Number 00000162

Product	Quantity	Line Item Description	Payment Type	Sales Price	Total Price
Professional	1.00	Professional edition with implementation & support - Includes 1TB of S3 Hot Storage	Annual Subscription	USD 16,770.00	USD 16,770.00
Storage - AWS - Glacier flexible (TBs)	5.00	1TB Glacier Cool Storage	Annual Subscription	USD 580.00	USD 2,900.00

Pricing Excluding Tax

Optional Service USD 0.00
Fee Total

Annual Subscription USD 19,670.00
Fee Total
One Time Fee Total USD 0.00



Part List

Overview Prices By Merchant

<https://pcpartpicker.com/list/XHzb9C>

Markup: T BB

History Save As Edit This Part List

Compatibility: See details below.

Estimated Wattage: 353W

Component	Selection	Base	Promo	Shipping	Tax	Availability	Price	Where	
CPU	AMD Ryzen 7 9700X 3.8 GHz 8-Core Processor	Base \$303.63	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$303.63	Where amazon.com	
CPU Cooler	Noctua NH-L9A-AM5 33.84 CFM CPU Cooler	Base \$49.95	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$49.95	Where amazon.com	
Motherboard	Asus PRIME B650-PLUS WIFI ATX AM5 Motherboard	Base \$159.99	Promo	Shipping ✓Prime	Tax	Availability Available soon	Price \$159.99	Where amazon.com	
Memory	Crucial Pro 64 GB (2 x 32 GB) DDR5-5600 CL46 Memory	Base \$139.99	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$139.99	Where amazon.com	
Storage	Samsung 990 Pro 2 TB M.2-2280 PCIe 4.0 X4 NVME Solid State Drive	Base \$149.99	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$149.99	Where amazon.com	
Video Card	Gigabyte WINDFORCE OC GeForce RTX 5060 8 GB Video Card	Base \$299.99	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$299.99	Where amazon.com	
Case	Fractal Design Focus G ATX Mid Tower Case	Base \$59.99	Promo	Shipping FREE	Tax	Availability In stock	Price \$59.99	Where 	
Power Supply	MSI MAG A650BN 650 W 80+ Bronze Certified ATX Power Supply	Base \$64.98	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$64.98	Where amazon.com	
Case Fan	Thermalright TL-C12C X3 66.17 CFM 120 mm Fans 3-Pack	Base \$11.99	Promo	Shipping ✓Prime	Tax	Availability In stock	Price \$11.99	Where amazon.com	

Total: **\$1240.50**

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Epson Expression 13000XL Archival Scanner with A3 Transparency Unit

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Kit



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- Max Resolution: 2400 x 4800 dpi
- Optional Transparency Film Scanning
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Funding Issue Narrative

Agency:	Arizona Historical Society
Issue:	1 IT Subscriptions and Hardware
Statutory Reference:	ARS § 39-101 ARS § 41-151.16 A.R.S. 41-823.A.1-4 A.R.S. 41-823.B
Equipment to be Purchased (if applicable):	This would obligate not only acquisition of new software subscriptions, but the purchase of: - 6 new laptops and desktops for archival and collections management - 2 new large flatbed archival scanners
Classification of New Positions:	N/A
Annualization(s):	N/A
Alignment with Agency's Strategic Plan or Statutory Responsibilities:	Per its governing statute, A.R.S. §§41-823, the Arizona Historical Society is charged with the preservation and public accessibility of its historical collections and archives to the people of Arizona and its visitors. Two strategic goals of the agency are to make AHS the most trusted authority on Arizona history, and to enhance its capacity to collect, preserve, interpret, and disseminate Arizona's history. The introduction and implementation of these proposed, new digital systems – with their annual subscription – and their supporting hardware will elevate and enhance the agency's ability to process, manage, and digitally preserve, catalog, and make accessible its collections and archives.
Impact on Historically Underserved, Marginalized, or Adversely Affected Groups:	<p>The agency's archivists receive recurrent inquiries and comments by researchers, students, and other members of the public concerning the availability and accessibility of its archival collections. The nature of this feedback exists within a range that identifies issues concerning ease of access, breadth and depth of posted (online) resources, and consistency of the up-time of the agency's digital collections and archives. The failure of the agency to adequately address the operational deficiencies presented by these software and hardware shortcomings and failings has resulted in significant displeasure and frustration among staff. This has long-term implications against agency moral and staff retention.</p>
How has feedback been incorporated from groups directly impacted by proposal?:	<p>Recent feedback from long-time and repeat patrons of the agency's high-resolution scanning services have expressed their dissatisfaction with the current quality of recent scans performed by the agency. The degradation in quality is a result of the broken and failing tracks on the agency's high-resolution scanners. The agency has had to temporarily suspend its microfilm processing services, which has negatively impacted the records retention efforts of other State agencies.</p> <p>To effectively lead, a firm understanding of the past is essential. The agency is tasked with preserving Arizona's history for the benefit and betterment of its people. This preservation begins and is sustained through careful and deliberate stewardship. That standard of care is maintained through technology. Software manages the agency's catalog - both internal and public-facing - and, increasingly, preserves digital-born archives representing the photos, videos, and oral histories of Arizona in the late 20th and early 21st centuries. These archives serve the public and satisfy their access to the records and materials of the state's history. Technology - digital catalogs, online hosting, scanners and processing machines - is essential to fulfilling this obligation and promise. The purchase of these new and replacement technologies will expand the agency's capacity to effectively catalog, manage, accept, and make increasingly available to the public its archive of over 12 million materials, including documents, photos, films, oral histories, maps, and architectural drawings. These archives serve traditional students and schools through the likes of its Education and Field Trip programs, its statewide National History Day contest (which results in Arizona students competing at a national level with the top students across the United States in Washington, D.C.), as well as through partnerships for on-site student research with the State's universities.</p> <p>Without the support of new state appropriations, the agency's existing deficiencies in its supporting technology will hurt Arizona's students, researchers, families, and leaders - limiting and effectively cutting them off from their shared past.</p>
Description of how this furthers the Governor's priorities:	

Agency Summary

Arizona Historical Society

Dr. David Breeckner, Executive Director

Phone: 4803875366

A.R.S. § 41-821(A)

Mission:

To connect people through the power of Arizona's history.

Description:

The Arizona Historical Society is a member- and government-supported nonprofit State agency. It is governed by a Governor-appointed board consisting of one representative of each county, one representative of each of five historical organizations, and five appointees at large. Museums and historic properties are located in Flagstaff, Tempe, Tucson, Yuma, Douglas, and Pine-Strawberry. The Society maintains an extensive library and archival collections used by a diverse audience, and it produces the Journal of Arizona History and various historical books. The Society certifies and supports 73 local historical societies in preserving and disseminating Arizona history. The Society also supports other board-approved community activities.

Agency Summary: (\$ Thousands)

Program	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
► Arizona Historical Society	4,094.2	4,113.5	4,889.0
Agency Total:	4,094.2	4,113.5	4,889.0

Funding:

	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
General Fund	2,975.9	4,113.5	4,889.0
Other Non-Appropriated Funds	1,118.3	-	-
Total Funding	4,094.2	4,113.5	4,889.0

FTE Positions	54.9	54.9	54.9
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5 Year Plan

Issue 1 Unified Organization Identity

Description: AHS strives to Create a unified identity for the organization (Internal and External)

Solutions:

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 the 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, budgetary alignment to reflect functional alignment with emphasis on the AHS organization as a single entity.

Issue 2 Financial Resources

Description: Enhance financial resources to advance our mission and ensure long-term sustainability and growth.

Solutions:

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, develop and grow relationships with elected officials.

Objective 2.4.1 Build awareness of AHS' 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 (boards and support groups) in overall fundraising plan.

Objective 2.6.1 Grow relationships with affiliate organizations.

Strategy 2.7 Optimize AHS' 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, and 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.

Issue 3 Community Trust

Description: To become the most trusted authority on Arizona history.

Solutions:

Strategy 3.1 Market and communicate information about our historical resources (what we have) and what we do with those resources

(e.g., publications, programs, exhibitions, events, and history education).

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 resource guide for inquiries requiring subject matter expertise.

Objective 3.1.4.1 Create a book club and suggested reading list.

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

Objective 3.2.1 Promote the Journal to scholars and 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 history and social studies teachers.

Objective 3.3.1 Develop 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.

Issue 4 Collections

Description: To improve our ability to collect, preserve, interpret, and disseminate Arizona's history.

Solutions:

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 4.3 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 a 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 AHS online catalogs of objects and archival documents.

Issue 5 Audience

Description: To attract audiences by creating transformative experiences through history

Solutions:

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, as appropriate.
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.

Resource Assumptions

	FY 2028 Estimate	FY 2029 Estimate	FY 2030 Estimate
Full-Time Equivalent Positions	54.9	54.9	54.9
General Fund	4,172.6	4,172.6	4,172.6
Other Appropriated Funds	-	-	-
Non-Appropriated Funds	1,092.0	1,172.0	1,172.0
Federal Funds	-	-	-

◆ Goal 1 Make AHS the most trusted authority on Arizona history.

Performance Measures	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
Number of museum visitors and researchers	19,388	5,000	20,267	22,500	25,000
Number of volunteer hours	1,593	3,500	734	2,200	1,250
Public program attendance	1,354	15,000	1,273	1,600	1,600
website and social media users, reach and followers analytics	914,686	450,000	257,340	4,500,000	350,000

◆ Goal 2 Enhance AHS’ capacity to collect, preserve, interpret, and disseminate Arizona’s history.

Performance Measures	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
increase earned various incomes	173,304	200,000	192,027	200,000	210,000

◆ **Goal 3** Develop experiences that are meaningful and relevant to today's audiences.

Performance Measures	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
improve collections accessibility	1,285,000	1,285,000	1,285,000	1,285,000	1,285,000
Number of Journal of Arizona History downloads.	42,306	42,000	42,965	43,000	47,000

◆ **Goal 4** Establish AHS as a strong, recognizable brand.

Performance Measures	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
improve quality of collections	100	60	60	60	60

◆ **Goal 5** Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Performance Measures	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
Museum visitation	7,748	40,000	6,224	8,500	8,500

Agency 5 Year Plan

HIA Arizona Historical Society

Issue 1 Unified Organization Identity

Description: AHS strives to Create a unified identity for the organization (Internal and External)

Solutions:

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 the 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, budgetary alignment to reflect functional alignment with emphasis on the AHS organization as a single entity.

Issue 2 Financial Resources

Description: Enhance financial resources to advance our mission and ensure long-term sustainability and growth.

Solutions:

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, develop and grow relationships with elected officials.

Objective 2.4.1 Build awareness of AHS' 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 (boards and support groups) in overall fundraising plan.

Objective 2.6.1 Grow relationships with affiliate organizations.

Strategy 2.7 Optimize AHS' 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, and 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.

Issue 3 Community Trust

Description: To become the most trusted authority on Arizona history.

Solutions:

Agency 5 Year Plan

Strategy 3.1 Market and communicate information about our historical resources (what we have) and what we do with those resources

(e.g., publications, programs, exhibitions, events, and history education).

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 resource guide for inquiries requiring subject matter expertise.

Objective 3.1.4.1 Create a book club and suggested reading list.

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

Objective 3.2.1 Promote the Journal to scholars and 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 history and social studies teachers.

Objective 3.3.1 Develop 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.

Issue 4 Collections

Description: To improve our ability to collect, preserve, interpret, and disseminate Arizona's history.

Solutions:

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 4.3 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 a 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 AHS online catalogs of objects and archival documents.

Issue 5 Audience

Description: To attract audiences by creating transformative experiences through history

Solutions:

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, as appropriate.

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.

Agency 5 Year Plan

Resource Assumptions

	FY 2028 Estimate	FY 2029 Estimate	FY 2030 Estimate
Full-Time Equivalent Positions	54.9	54.9	54.9
General Fund	4,172.6	4,172.6	4,172.6
Other Appropriated Funds	-	-	-
Non-Appropriated Funds	1,092.0	1,172.0	1,172.0
Federal Funds	-	-	-

AGENCY SUMMARY

Program: HIA Arizona Historical Society

Director: Dr. David Breeckner, Executive Director

Phone: Administration 4803875366

Statute: A.R.S. § 41-821(A)

Plan Contact: Rebekah Tabah-Percival, Assistant Director
Administration 480 387 5356

Mission:

To connect people through the power of Arizona's history.

Description:

The Arizona Historical Society is a member- and government-supported nonprofit State agency. It is governed by a Governor-appointed board consisting of one representative of each county, one representative of each of five historical organizations, and five appointees at large. Museums and historic properties are located in Flagstaff, Tempe, Tucson, Yuma, Douglas, and Pine-Strawberry. The Society maintains an extensive library and archival collections used by a diverse audience, and it produces the Journal of Arizona History and various historical books. The Society certifies and supports 73 local historical societies in preserving and disseminating Arizona history. The Society also supports other board-approved community activities.

◆ Goal 1 Make AHS the most trusted authority on Arizona history.

Performance Measures:

ML	Budget	Type	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OP Number of museum visitors and researchers	19,388	5,000	20,267	22,500	25,000
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IP Number of volunteer hours	1,593	3,500	734	2,200	1,250
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OP Public program attendance	1,354	15,000	1,273	1,600	1,600
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OC website and social media users, reach and followers analytics	914,686	450,000	257,340	4,500,000	350,000

◆ Goal 2 Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history.

Performance Measures:

ML	Budget	Type	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
<input checked="" type="checkbox"/>	<input type="checkbox"/>	IP increase earned various incomes	173,304	200,000	192,027	200,000	210,000

◆ Goal 3 Develop experiences that are meaningful and relevant to today's audiences.

Performance Measures:

ML	Budget	Type	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
<input checked="" type="checkbox"/>	<input type="checkbox"/>	QL improve collections accessibility	1,285,000	1,285,000	1,285,000	1,285,000	1,285,000
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OC Number of Journal of Arizona History downloads.	42,306	42,000	42,965	43,000	47,000

◆ Goal 4 Establish AHS as a strong, recognizable brand.

Performance Measures:

ML	Budget	Type	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
<input checked="" type="checkbox"/>	<input type="checkbox"/>	QL improve quality of collections	100	60	60	60	60

AGENCY SUMMARY

Program: HIA Arizona Historical Society

Director: Dr. David Breeckner, Executive Director

Phone: Administration 4803875366

Statute: A.R.S. § 41-821(A)

Plan Contact: Rebekah Tabah-Percival, Assistant Director

Administration 480 387 5356

◆ **Goal 5 Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.**

Performance Measures:

ML	Budget	Type	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OC Museum visitation	7,748	40,000	6,224	8,500	8,500

Budget Related Performance Measures
HIA Arizona Historical Society

PROGRAM SUMMARY								
Program:		Arizona Historical Society (HIA)						
Contact:		Dr. David Breeckner, Executive Director 4803875366						
2nd Contact:		Rebekah Tabah-Percival, Assistant Director 480 387 5356						
Statute:		A.R.S. § 41-821(A)						

ML	Budget	Type	Performance Measures	FY 2024 Actual	FY 2025 Estimate	FY 2025 Actual	FY 2026 Estimate	FY 2027 Estimate
X	X	OP	Number of museum visitors and researchers	19,388	5,000	20,267	22,500	25,000
X	X	IP	Number of volunteer hours	1,593	3,500	734	2,200	1,250

Not in Master List

Goals without any Performance Measures Marked for inclusion in the Master List

The display of the footnote: * = Agency, Program, or Sub Program has no goals with publishable performance measures.

Explore Plans

P 0 HIA Arizona Historical Society

- G 1 Make AHS the most trusted authority on Arizona history.
 - P 1 Number of museum visitors and researchers
 - P 2 Number of volunteer hours
 - P 3 Public program attendance
 - P 4 website and social media users, reach and followers analytics
- G 2 Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history.
 - P 1 increase earned various incomes
- G 3 Develop experiences that are meaningful and relevant to today's audiences.
 - P 1 improve collections accessibility
 - P 2 Number of Journal of Arizona History downloads.
- G 4 Establish AHS as a strong, recognizable brand.
 - P 1 improve quality of collections
- G 5 Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.
 - P 1 Museum visitation

P 1 HIA-1-0 Arizona Historical Society

- S 1 HIA-1-1 Arizona Historical Society
- S 2 HIA-1-2 SLI Field Services and Grants
- S 3 HIA-1-3 SLI Papago Park Museum
- S 4 HIA-1-5 SLI Flagstaff Pioneer Museum

Explore Plans

P 0 HIA Arizona Historical Society

- G 1 HIA-G001 Make AHS the most trusted authority on Arizona history.
 - P 1 HIA-PM0002 Number of museum visitors and researchers
 - P 2 HIA-PM0003 Number of volunteer hours
 - P 3 HIA-PM0001 Public program attendance
 - P 4 HIA-PM0004 website and social media users, reach and followers analytics
- G 2 HIA-G002 Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history.
 - P 1 HIA-PM0005 increase earned various incomes
- G 3 HIA-G003 Develop experiences that are meaningful and relevant to today's audiences.
 - P 1 HIA-PM0007 improve collections accessibility
 - P 2 HIA-PM0006 Number of Journal of Arizona History downloads.
- G 4 HIA-G004 Establish AHS as a strong, recognizable brand.
 - P 1 HIA-PM0008 improve quality of collections
- G 5 HIA-G005 Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.
 - P 1 HIA-PM0009 Museum visitation

P 1 HIA-1-0 Arizona Historical Society

- S 1 HIA-1-1 Arizona Historical Society
- S 2 HIA-1-2 SLI Field Services and Grants
- S 3 HIA-1-3 SLI Papago Park Museum
- S 4 HIA-1-5 SLI Flagstaff Pioneer Museum