

Appropriation Request
2024-2025



Pennsylvania
Historical & Museum
Commission

Presented to the House and Senate Appropriations Committees

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EXECUTIVE DIRECTOR STATEMENT

EXECUTIVE DIRECTOR'S STATEMENT

Agency Mission Statement: *The mission of the [Historical and Museum Commission](#) is to discover, protect, and share Pennsylvania's past, inspiring others to value and use our history in meaningful ways.*

The legal responsibilities of PHMC as defined in the History Code, the Administrative Code, and the Constitution of Pennsylvania include:

- The conservation of Pennsylvania's historical and natural heritage.
- The preservation of public records, historic documents, and objects of historic interest.
- The identification, restoration, and preservation of architecturally and historically significant sites and structures.
- The publication and reproduction of materials of historical or archaeological interest including anthropology, art, cartography, folklore, and other cultural elements of Pennsylvania's heritage.

Programs and Goals:

- **State Historic Preservation:** *To manage and safeguard Pennsylvania's historic resources through a comprehensive history and museum program focused on preservation, study, and interpretation of all areas of Pennsylvania history, providing exhibits and programs to share this history with learners of all ages.*

- **Museum Assistance:** *To assure preservation and accessibility of Pennsylvania's rich heritage through representative artifacts and specimens of history, art, and science for all citizens through the support of museums and historical sites within the Commonwealth.*

Organizational Structure: PHMC oversees the [State Historic Preservation Office](#), the [State Museum](#), the [State Archives](#), and the [Bureau of Historic Sites and Museums](#). PHMC is governed by a commission consisting of nine residents of the Commonwealth appointed by the Governor and confirmed by the Senate; four members of the General Assembly, two from the Senate, one appointed by the President Pro Tempore and one by the Minority Leader, and two from the House of Representatives, one appointed by the Speaker and one by the Minority Leader; and the Secretary of Education or his designee. PHMC is led by the [Executive Director](#) who is responsible for the overall operations of the agency with the assistance of the [Bureau of Management Services](#).

BUDGET PRIORITIES:

General Government Operations (GGO): The GGO appropriation for SFY 2024–25, as outlined in the Governor’s Executive Budget, is \$25.8 million. This represents a \$3.4 million or 15 percent increase over last year’s budget.

Cost-to-Carry: Eighty-five percent (85%) of the increase, \$2.879 million, is cost-to-carry. This increase includes \$1.591 million for contractual increases related to personnel and \$.324 million for increased costs for shared services. **Importantly, there is an increase of \$.964 million necessary to fund the operation of the Commonwealth’s new State Archives facility.** This 100-year, 145,000-square-foot building holds the 250 million permanently valuable documents of the Commonwealth, preserving them for all Pennsylvanians and making them publicly available in this state-of-the-art facility. **The \$.964 million supports utilities, systems maintenance, fire and security needs, and general facilities operations from trash removal to lawn maintenance and plowing, all expenses PHMC has not been responsible for in the past. PHMC has not, to date, received any increase in funding associated with the operational costs for this new building.**

New initiatives: Fifteen percent (15%) of the proposed increase, \$.521 million, is associated with two initiatives:

- *Environmental Review:* Two new environmental review positions are proposed within the State Historic Preservation Office to ensure timely environmental reviews with the increased number of projects resulting from the Infrastructure Investment and Jobs Act; this initiative is funded at \$.212 million.
- *Heritage Tourism:* Three new positions within the Bureau of Historic Sites and Museums will augment the promotion of heritage tourism across the Commonwealth’s 24 historic sites, introducing new initiatives around the 250th anniversary of the nation and outdoor education and recreation; this initiative is funded at \$.309 million.

State Records Center: The GGO subfund, is requesting \$1.056 million in this year’s budget. PHMC charges back each agency that uses the State Records Center based upon the number of boxes in storage. With the increasing number of digital-born documents, PHMC is developing a project to support and maintain a system of digital preservation that will serve all state agencies. The new Digital Archives and Digital Records Center provides the storage and preservation services for digital records in the way that the State Archives and State Records Center already provides for paper records.

Keystone Fund: This fund is vital to the agency’s ability to meet its mandate to preserve and protect the historical sites and artifacts of the Commonwealth. The Keystone Fund plays a critical role in supporting the preservation of PHMC’s own sites and museums and their associated collections. Keystone Fund money is the primary source of funding to support all agency-managed preservation work and infrastructure improvement at the State Archives, State Museum, and the agency’s historic sites and museums across the state – 355 buildings across 1,982 acres. PHMC also uses Keystone Fund money to support the preservation of historic buildings and collections owned by the other entities across the Commonwealth. PHMC also awarded 48 Keystone Historic Preservation Grants for planning and construction to local governments and nonprofits totaling more than \$2.5 million, having a tremendously positive impact on many local economies. In addition, PHMC awarded \$200,000 in Historical and Archival Records Care (HARC) Grants to 37 organizations in 20

Pennsylvania counties to improve the preservation and accessibility of historically significant records maintained by local governments, historical societies, and academic institutions.

Cultural and Historical Support Grants: The commission also recognizes the vital role that funding for Cultural and Historical Support Grants (CHSG) plays in supporting historical and cultural institutions in communities across Pennsylvania. Last year, PHMC awarded \$2 million in grant funding to 161 eligible museums and official county historical societies from 56 Pennsylvania counties, helping these institutions achieve their missions and affording Pennsylvanians across the state greater opportunities to connect with their history.

PHMC recognizes the important role its local partners in history play in providing cultural amenities to their residents, offering educational experiences, driving tourism, and revitalizing historic communities; to this end, the agency disburses significant funding to cultural institutions, local governments, and communities. When accounting for the Keystone and CHSG grants and the \$151,488 in federal funds passed through to local governments, last year's total grant investment in historical resources across the state was \$4.6 million.

CLOSING STATEMENT:

PHMC makes every effort to ensure our operating model supports the mission of the agency in the most cost-effective manner. The SFY 2024–25 spending plan that is set forth in this document demonstrates an aggressive approach for addressing our fiscal responsibility while administering the core programs of the agency. The Commission's goal is to preserve the Commonwealth's past so that current residents have context for the present, citizens can plan for the future of their communities and the state, and future generations will be strengthened and inspired by the ideals and traditions of Pennsylvania's heritage. PHMC requests funding support at the levels presented and the authority granted by the Executive and Legislative branches.

SUMMARY BY FUND AND APPROPRIATION

SUMMARY BY FUND AND APPROPRIATION
(Dollar Amounts in Thousands)
PA Historical and Museum Commission
2024-25 Budget Request

| Fund/Appropriation (SAP Fund Type / SAP Fund) | 2022-23 | 2023-24 | 2024-25 | Estimate | Estimate | Estimate | Estimate |
|---|------------------|---------------------|-------------------|-----------------|-----------------|-----------------|-----------------|
| | Budget Actual | Budget Available | Budget Request | 2025-26 | 2026-27 | 2027-28 | 2028-29 |
| GENERAL FUND | | | | | | | |
| (S) General Government Operations | \$21,764 | \$22,417 | \$25,817 | \$26,784 | \$27,724 | \$27,994 | \$28,264 |
| (F) Historic Preservation | 3,490 | 3,150 | 3,150 | 3,150 | 3,150 | 3,150 | 3,150 |
| (F) Surface Mining | 170 | 180 | 160 | 160 | 160 | 160 | 160 |
| (F) Environmental Review | 370 | 380 | 380 | 380 | 380 | 380 | 380 |
| (F) American Battlefield Protection Program | 3,500 | 6,000 | 6,000 | 6,000 | 6,000 | 6,000 | 6,000 |
| (F) Maritime Heritage | 525 | 0 | 0 | 0 | 0 | 0 | 0 |
| (F) Appalachian Development | 100 | 100 | 0 | 0 | 0 | 0 | 0 |
| (F) National Endowment for the Humanities | 0 | 49 | 49 | 49 | 49 | 49 | 49 |
| (A) State Records Center | 958 | 1,056 | 1,056 | 1,056 | 1,056 | 1,056 | 1,056 |
| (A) Keystone Historic Site Development Fund* | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Subtotal - State Funds | \$21,764 | \$22,417 | \$25,817 | \$26,784 | \$27,724 | \$27,994 | \$28,264 |
| Subtotal - Federal Funds | 8,155 | 9,859 | 9,739 | 9,739 | 9,739 | 9,739 | 9,739 |
| Subtotal - Augmentations | 958 | 1,056 | 1,056 | 1,056 | 1,056 | 1,056 | 1,056 |
| Subtotal - Restricted Revenues | \$133 | \$80 | \$80 | \$80 | \$80 | \$80 | \$80 |
| Total - General Government Operations | \$31,010 | \$33,412 | \$36,692 | \$37,659 | \$38,599 | \$38,869 | \$39,139 |

| Fund/Appropriation (SAP Fund Type / SAP Fund) | 2022-23 Budget Actual | 2023-24 Budget Available | 2024-25 Budget Request | Estimate 2025-26 | Estimate 2026-27 | Estimate 2027-28 | Estimate 2028-29 |
|---|-----------------------------|--------------------------------|------------------------------|---------------------|---------------------|---------------------|---------------------|
| <u>GRANTS AND SUBSIDIES</u> | | | | | | | |
| Cultural and Historical Support | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 |
| Total - Grants | \$2,000 | \$2,000 | \$2,000 | \$2,000 | \$2,000 | \$2,000 | \$2,000 |
| <u>OTHER FUNDS</u> | | | | | | | |
| Historical Preservation Fund | | | | | | | |
| General Operations | 1,167 | 1,167 | 1,342 | 1,342 | 1,342 | 1,342 | 1,342 |
| Mitigation and Special Projects | 595 | 709 | 709 | 309 | 209 | 9 | 9 |
| Total - Historical Preservation Fund | 1,762 | 1,876 | 2,051 | 1,651 | 1,551 | 1,351 | 1,351 |
| Keystone Recreation, Park and Conservation Fund | | | | | | | |
| Historic Site Development | 17,097 | 14,559 b | 17,475 | 20,023 | 22,884 | 24,642 | 26,115 |
| Total - Other Fund | \$18,859 | \$16,435 | \$19,526 | \$21,674 | \$24,435 | \$25,993 | \$27,466 |
| <u>RESTRICTED REVENUE</u> | | | | | | | |
| Rentals and Other Income | \$133 | \$80 | \$80 | \$80 | \$80 | \$80 | \$80 |
| Department Total - All Funds | | | | | | | |
| General Funds | \$23,764 | \$24,417 | \$27,817 | \$28,784 | \$29,724 | \$29,994 | \$30,264 |
| Federal Funds | 8,155 | 9,859 | 9,739 | 9,739 | 9,739 | 9,739 | 9,739 |
| Augmentations | 958 | 1,056 | 1,056 | 1,056 | 1,056 | 1,056 | 1,056 |
| Other Funds | 18,859 | 16,435 | 19,526 | 21,674 | 24,435 | 25,993 | 27,466 |
| Restricted Revenue | 133 | 80 | 80 | 80 | 80 | 80 | 80 |
| TOTAL ALL FUNDS | \$51,869 | \$51,847 | \$58,218 | \$61,333 | \$65,034 | \$66,862 | \$68,605 |

*Show as zero to avoid double counting.

b Includes recommended supplemental executive authorization of \$3,227,000

APPROPRIATION DETAIL

PHMC SFY 2024-25 BUDGET REQUEST

(\$ Amounts in Thousands)

| | |
|--|--------------------------------------|
| Page # of Governor's Executive Budget: | General Government Operations |
| Pp. E26-1-E26-7 | 10347 |

| I. SUMMARY FINANCIAL DATA | | | |
|--|---------------------------|------------------------------|-----------------------------|
| (\$ Amount in Thousands) | | | |
| | 2022-23 Actual | 2023-24 Available | 2024-25 Budgeted |
| State Fund Total | \$21,764 | \$22,417 | \$25,817 |
| General Government Operations (10347) | \$21,764 | \$21,764 | \$25,817 |
| Federal Funds Total | \$8,155 | \$9,859 | \$9,739 |
| Historical Preservation (70235) | \$3,490 | \$3,150 | \$3,150 |
| Surface Mining Revenue (70507) | \$170 | \$180 | \$160 |
| Environmental Review (70509) | \$370 | \$380 | \$380 |
| American Battlefield (71028) | \$3,500 | \$6,000 | \$6,000 |
| Maritime Heritage (71038) | \$525 | \$0 | \$0 |
| National Endowment for Humanities (70795) | \$0 | \$49 | \$49 |
| Appalachian Develop (71090) | \$100 | \$100 | \$0 |
| Other Funds Total | \$1,091 | \$1,136 | \$1,136 |
| State Record Center | \$958 | \$1,056 | \$1,056 |
| Keystone Recreation, Parks and Conservation | \$0 | \$0 | \$0 |
| Rental and Other Income | \$133 | \$80 | \$80 |
| Total | \$31,010 | \$33,412 | \$36,692 |
| <i>a</i> Keystone Recreation, Parks and Conservation | \$855 | \$728 | \$875 |
| Total including Keystone | <u>\$31,865</u> | <u>\$34,140</u> | <u>\$37,567</u> |

II. DETAIL BY MAJOR OBJECT

(\$ Amount in Thousands)

| | 2022-2023 Actual | 2023-24 Available | 2024-25 Budgeted | Change Budgeted vs. Available | Percent Change |
|-------------------------------------|---------------------|----------------------|---------------------|-------------------------------------|-------------------|
| PERSONNEL | | | | | |
| <i>State Funds</i> | \$16,752 | \$18,296 | \$20,206 | \$1,910 | 10% |
| <i>Federal Funds</i> | \$1,445 | \$1,644 | \$1,575 | (\$69) | -4% |
| <i>Other Funds</i> | \$651 | \$655 | \$681 | \$26 | 4% |
| Total Personnel | \$18,848 | \$20,595 | \$22,462 | \$1,867 | 9.07% |
| OPERATING | | | | | |
| <i>State Funds</i> | \$5,011 | \$4,121 | \$5,611 | \$1,490 | 36% |
| <i>Federal Funds</i> | \$395 | \$1,215 | \$1,214 | (\$1) | 0% |
| <i>Other Funds</i> | \$487 | \$481 | \$455 | (\$26) | -5% |
| Total Operating | \$5,893 | \$5,817 | \$7,280 | \$1,463 | \$0 |
| FIXED ASSETS | | | | | |
| <i>State Funds</i> | \$0 | \$0 | \$0 | \$0 | 0% |
| <i>Federal Funds</i> | \$0 | \$0 | \$0 | \$0 | 0% |
| <i>Other Funds</i> | \$0 | \$0 | \$0 | \$0 | 0% |
| Total Fixed Assets | \$0 | \$0 | \$0 | \$0 | 0% |
| GRANTS & SUBSIDIES | | | | | |
| <i>Federal Funds</i> | \$4,100 | \$6,100 | \$6,000 | (\$100) | -2% |
| <i>Other Funds</i> | \$0 | \$0 | \$0 | \$0 | 0% |
| Total Grants & Subsidies | \$4,100 | \$6,100 | \$6,000 | (\$100) | (\$0) |
| NON-EXPENSE ITEMS | | | | | |
| <i>State Funds</i> | \$1 | \$0 | \$0 | \$0 | 0% |
| Total Non-Expense Items | \$1 | \$0 | \$0 | \$0 | 0% |
| BUDGETARY RESERVE | | | | | |
| <i>State Funds</i> | \$0 | \$0 | \$0 | \$0 | 0% |
| <i>Federal Funds</i> | \$2,215 | \$900 | \$950 | \$50 | 6% |
| Total Grants & Subsidies | \$2,215 | \$900 | \$950 | \$50 | \$0 |

| | 2022-2023 Actual | 2022-2023 Available | 2024-2025 Budgeted | Change Budgeted vs. Available | Percent Change |
|---------------------|---------------------|------------------------|-----------------------|-------------------------------------|-------------------|
| TOTAL | | | | | |
| State Funds | \$21,764 | \$22,417 | \$25,817 | \$3,400 | 15% |
| Federal Funds | \$8,155 | \$9,859 | \$9,739 | (\$120) | -1% |
| Other Funds | \$1,138 | \$1,136 | \$1,136 | \$0 | 0.00% |
| Total Funds* | \$31,057 | \$33,412 | \$36,692 | \$3,280 | 9.82% |

* Does not include rental income fund

III. HISTORY OF LAPSES

(\$ Amount in Thousands)

| | 2022-2023 | 2023-24 | 2024-25 Estimated |
|--------------------|-----------|---------|----------------------|
| <i>Other Funds</i> | \$0 | \$0 | \$0 |

IV. COMPLEMENT INFORMATION

| | 6/30/2023 | 1/31/2024 | 2024-2025 Budgeted |
|-------------------|-----------|-----------|-----------------------|
| Benefit Factor | 73.30% | 77.00% | 75.60% |
| State Funded | | | |
| <i>Authorized</i> | 218 | 218 | 223 |
| <i>Filled</i> | 190 | 197 | 190 |
| Federal Funded | | | |
| <i>Authorized</i> | 0 | 0 | 0 |
| <i>Filled</i> | | | |
| Total | | | |
| <i>Authorized</i> | 218 | 218 | 223 |
| <i>Filled</i> | 190 | 197 | 178 |

V. DERIVATION OF REQUEST / LEGISLATIVE CITATIONS / DISBURSEMENT CRITERIA

Derivation of Request:

(A) Personnel Expense

Personnel costs were prepared in the complement module of the BPC system using instructions and factors provided by the Governor's Budget Office and provides for continuing operation.

(B) Operating Expense

Operating Funds were developed from historical data and provides for maintenance of continuing operation.

Additional Information

(1) Amount of Waiver Funds Available (\$ amounts in thousands) as of February 2024

| | |
|---------|---------|
| FY2020 | \$10 |
| FY2021 | \$665 |
| FY 2022 | \$1,385 |

Waivered funds will be used for expenses not covered in the capital and FFE budgets for the new PA State Archives facility. Funds will also be used for fixed assets such as vehicles and equipment for historic sites and museums accross the state that were delayed due to Covid-19 purchasing ban and supply chain delays. Funds will also be used for a reuse study of existing State Archive facility to be vacated, upgrades to the Ticketing, Event Management, and Membership software, and other general operating expenses.

(1) 2022-23 Obligations rolled forward to 2024-25

None

V. DERIVATION OF REQUEST / LEGISLATIVE CITATIONS / DISBURSEMENT CRITERIA

Legislative Citations:

Authority: 1988-72, the History Code; Act 6A-1998, the General Appropriations Act; Title XXVIA, Section 2801-A of the Administrative code.

Disbursement Criteria:

Expenditures for personnel costs are based on authorized salaried and wage personnel who fulfill the agency's program plans within the limits of available funds. Expenditures for operating costs and equipment are a combination of invoices for payment of goods and services procured to support daily operations and contractual agreements for the provision of professional services.

VI. EXPLANATION OF CHANGES

(\$ Amounts in Thousands)

| | State \$ | Federal \$ | Other \$ | Total \$ |
|---|-----------------|-------------------|-----------------|-----------------|
| PERSONNEL | | | | |
| 1. Decrease to continue current program. | | (\$69) | | (\$69) |
| 2. Increase to continue current program | \$1,865 | | \$26 | \$1,891 |
| 3. Initiatives | \$522 | | | 522 |
| Subtotal Personnel | \$2,387 | (\$69) | \$26 | \$2,344 |
| OPERATING | | | | |
| 1. Increase to continue current program | \$1,013 | | | \$1,013 |
| 2. Decrease in federal operating costs | | (\$1) | | (\$1) |
| 3. Decrease in state records operating costs. | | | (\$26) | (\$26) |
| Subtotal Operating | \$1,013 | (\$1) | (\$26) | \$986 |
| GRANT & SUBSIDY | | | | |
| 1. Decrease in expected awards for grants. | \$0 | (\$100) | \$0 | (\$100) |
| Subtotal Grant & Subsidy | \$0 | (\$100) | \$0 | (\$100) |
| BUDGETARY RESERVE | | | | |
| 1. Increase in Historical Preservation Grant | \$0 | \$50 | \$0 | \$50 |
| Subtotal Budgetary Reserve | \$0 | \$50 | \$0 | \$50 |
| GRAND TOTAL | \$3,400 | (\$120) | \$0 | \$3,280 |

PHMC FY 2024-25 BUDGET REQUEST

(\$ Amounts in Thousands)

| | |
|--|--|
| Page # of Governor's Executive Budget: | Cultural and Historical Support |
| Pp. E26-1-E26-7 | 11057 |

| I. SUMMARY FINANCIAL DATA (\$ Amount in Thousands) | 2022-2023 Available | 2023-2024 Budgeted | 2024-2025 Budgeted |
|--|--------------------------------|-------------------------------|-------------------------------|
| Cultural and Historical Support Total State funds | \$2,000 | \$2,000 | \$2,000 |
| Total | <u>\$2,000</u> | <u>\$2,000</u> | <u>\$2,000</u> |

| II. DETAIL BY MAJOR OBJECT (\$ Amount in Thousands) | 2022-2023 Available | 2023-2024 Budgeted | 2024-2025 Budgeted | Change Budgeted vs. Available | Percent Change |
|---|--------------------------------|-------------------------------|-------------------------------|--|---------------------------|
| OPERATING | | | | | |
| <i>State Funds</i> | \$100 | \$100 | \$100 | \$0 | 0.00% |
| GRANTS & SUBSIDIES | | | | | |
| <i>State Funds</i> | \$1,900 | \$1,900 | \$1,900 | \$0 | 0.00% |
| TOTAL FUNDS | | | | | |
| <i>State Funds</i> | \$2,000 | \$2,000 | \$2,000 | \$0 | 0.00% |
| Total Funds | <u>\$2,000</u> | <u>\$2,000</u> | <u>\$2,000</u> | <u>\$0</u> | <u>0.00%</u> |

III. HISTORY OF LAPSES

(\$ Amount in Thousands)

| | 2022-2023 | 2023-2024 | 2024-2025 Estimated |
|--|------------------|------------------|--------------------------------|
| | \$0 | \$0 | \$0 |

IV. COMPLEMENT INFORMATION

| | 6/30/2023 | 1/31/2024 | 2024-2025 Budgeted |
|-------------------|------------------|------------------|-------------------------------|
| Benefit Factor | N/A | N/A | N/A |
| State funded | | | |
| <i>Authorized</i> | N/A | N/A | N/A |
| <i>Filled</i> | N/A | N/A | N/A |

V. DERIVATION OF REQUEST / LEGISLATIVE CITATIONS / DISBURSEMENT CRITERIA

Derivation of Request:

(A) Operating Expense

Operating funds are used to maintain the eGrant system and other operating expenditures.

(B) Grant Expense

For awards made to grantees.

Additional Information

- | | |
|--|----------|
| (1) Obligations rolled forward to 2024-25: | N/A |
| (2) 2024-25 Supplemental appropriation needs: | N/A |
| (3) Prior FY appropriations waived pursuant to Act 146 of 1980 : | \$57,768 |

Legislative Citations:

Act No. 1-A, General Appropriations Act

Disbursement Criteria:

Grants are general operation support and evaluated against predetermined criteria, Grants awards are disbursed using an invoice process.

VI. EXPLANATION OF CHANGES

(\$ Amounts in Thousands)

| | State \$ | Federal \$ | Other \$ | Total \$ |
|-----------|----------|------------|----------|----------|
| OPERATING | | | | |

| | | | | |
|----------------------------|-------------------|-------------------|-------------------|-------------------|
| Subtotal Operating | \$0 | \$0 | \$0 | \$0 |
| GRANT & SUBSIDIES | | | | |
| Subtotal Grant & Subsidies | \$0 | \$0 | \$0 | \$0 |
| GRAND TOTAL | <u><u>\$0</u></u> | <u><u>\$0</u></u> | <u><u>\$0</u></u> | <u><u>\$0</u></u> |

PROGRAM INITIATIVES

Celebrating Pennsylvania: *Maximizing Assets and Promoting Heritage Tourism at PHMC's Historic Sites and Museums*

Objective: Pennsylvania has played a central and impactful role in the building of the United States from the seventeenth century to the present. Understanding Pennsylvania's history is key to understanding the nation's history, and this national historical significance is a critical asset to driving Pennsylvania's heritage tourism economy. PHMC's historic sites and museums connect to complex national history themes, including democracy, freedom, equality, the meeting of cultures, agriculture, industrialization, science and technology, immigration, the natural environment, national security and more. The purpose of this initiative is to enable PHMC to maximize key assets at its historic sites and museums to develop robust, relevant interpretation and educational programming that celebrates the Commonwealth's nationally significant history and strengthens the agency's impact on Pennsylvania's heritage tourism economy during the nation's 250th anniversary in 2026 and for years to come. This initiative will allow PHMC to:

1. Overhaul the decades old interpretation under which the Pennsylvania Trails of History currently operates.
2. Develop curricula and programming that celebrates Pennsylvania's nationally significant history, provides context for today, and fosters civic engagement and civil discourse.
3. Develop a heritage recreation program that connects recreational pursuits to the exploration of Pennsylvania's rich history at PHMC historic sites.

Amount Requested: \$309,000

New Line or Existing Appropriation(s): Existing GGO (SAP Fund 1034700000).

Personnel Requirements: (see chart below)

| # of New Positions | Position Classification | Pay Scale Group & Level |
|---------------------------|--|------------------------------------|
| 1 | Museum and Historic Site Administrator 2 | ST 09-01 |
| 1 | Museum Curator History 1 | ST 06-01 |
| 1 | Museum Educator 1 | ST 06-01 |

Program Initiative - PHMC

What are the expected outcomes:

- Reimagined interpretation will make sites more relevant to the public, enabling PHMC to better capitalize on heritage tourism and increase visitation.
- Curricula and programming that celebrates Pennsylvania's nationally significant history will position the Commonwealth as central to the America250 celebration, driving heritage tourism for years to come.
- The heritage recreation initiative will deliver history via formats that will appeal to visitors who prioritize recreation, not only engaging an existing untapped audience with the mission of sites but providing PHMC with the ability to capture new recreational visitors

Environmental Review Streamlining

Objective: The purpose of this initiative is to streamline review and consultation on projects supported with Infrastructure Investment and Jobs Act (IIJA) funding, permits and/or licenses as required by federal regulations (36CFR800). PHMC’s State Historic Preservation Office will be required to review an influx of projects that have the potential to affect historic properties, including archaeological sites, and we are anticipating at least twice the number of current reviews. By increasing staff complement to facilitate timely project reviews, PHMC will be better equipped to assist federal and state agencies more efficiently and have the capacity to expedite reviews. This initiative will address the following:

1. Environmental Review Streamlining initiative is in response to expanded federal programs resulting from the Infrastructure Investment & Jobs Act (IIJA).
2. SHPO responsibilities under the National Historic Preservation Act are to advise, assist, and consult on the review of federally assisted projects that have the potential to affect historic properties, including archaeological sites.
3. IIJA monies (federal funds) are being distributed to Commonwealth agencies. This will result in a significant increase in environmental reviews by SHPO; the office is already seeing an impact. For the current SFY, 2023-24, Pennsylvania’s SHPO is on track to review upwards of 2,800 more projects than the previous year.

Amount Requested: \$212,000

New Line or Existing Appropriation(s): Existing GGO (SAP Fund 1034700000).

Personnel Requirements: (see chart below)

| New Positions | Position Classification | Scale Group & Level |
|---------------|----------------------------------|---------------------|
| 2 | Historic Preservation Specialist | ST 07-01 |

What are the expected outcomes: The State Historic Preservation Office (SHPO) is required by law to process initial reviews within a 30-calendar-day time period. With the influx of IIJA funds to our partner agencies, PHMC is not able to carry out this unfunded mandate without PRR revisions. Funding support to PHMC will aid in quicker response times and permit us to help partner agencies manage projects efficiently and effectively.

Implementation Timeline:

- August 2024 – fill two new environmental review positions
- September-October – SHPO will develop training to educate agency partners and their applicants on how to successfully and efficiently complete consultation under Section 106 of the National Historic Preservation Act.

Program Initiative – PHMC

- November 2024-June 2025 (and ongoing as needed) – SHPO will work on programmatic solutions with agency partners to determine no effect activities which will further streamline consultation and will equate to significant time and cost savings.
- Concurrently - SHPO will work with agency partners to identify historic properties, including potential archaeological sites, within IJA project areas, to further expedite IJA project delivery.

Metrics

- Execute 2 training programs/SFY to agency partners responsible for carrying out Section 106 of the National Historic Preservation Act as triggered by IJA projects.
- Execute 1-2 agreements/SFY with IJA agencies to streamline consultation.
- Continue to track environmental review response times.

SPECIAL FUNDS INDEX

Historical Preservation Fund

This fund was created for expenditure by the Historical and Museum Commission for the preservation, care and maintenance of state historical properties, museums and records and for the financing of historical research and publication programs. Money in the fund can also be used to support publications and properties. This fund is made up of monies from the sale of publications by the Pennsylvania Historical and Museum by the commission at the state historical properties and/or museums. Act 173 of 2002 enables the commission to sell most commonwealth publication to the public and provides that net proceeds from the publication sales and from the sale of historical properties administered by the commission shall be deposited into the fund. The Historical Preservation Fund is designated for projects of the Historical and Museum Commission for which they have agreements to complete over a period of several fiscal years.

Statement of Cash Receipts and Disbursements:
(Dollar Amounts In Thousands)

| | <u>2022-23</u> <u>Actual</u> | <u>2023-24</u> <u>Available</u> | <u>2024-25</u> <u>Estimated</u> |
|---|---------------------------------|------------------------------------|------------------------------------|
| Restricted Cash Balance, Beginning..... | 3,194 | 2,602 | 1,893 |
| Receipts..... | 2 | - | 5 |
| Disbursements - Historical and Museum Commission..... | (594) | (709) | (709) |
| Restricted Cash Balance, Ending..... | <u>2,602</u> | <u>1,893</u> | <u>1,189</u> |
| Unrestricted Cash Balance, Beginning..... | 2,074 | 3,117 | 3,423 |
| Receipts: | | | |
| Admission Fees..... | 1,265 | 1,000 | 1,000 |
| Interest..... | 196 | 318 | 234 |
| Other..... | 442 | 155 | 155 |
| Total Receipts..... | <u>1,903</u> | <u>1,473</u> | <u>1,389</u> |
| Total Funds Available..... | <u>3,977</u> | <u>4,590</u> | <u>4,812</u> |
| Disbursements: | | | |
| Historical and Museum Commission..... | 860 | 1,167 | 1,342 |
| Total Disbursements..... | <u>(860)</u> | <u>(1,167)</u> | <u>(1,342)</u> |
| Unrestricted Cash Balance, Ending..... | <u>3,117</u> | <u>3,423</u> | <u>3,470</u> |
| Total Cash Balance, Beginning..... | 5,268 | 5,719 | 5,316 |
| Receipts..... | 1,905 | 1,473 | 1,394 |
| Disbursements..... | (1,454) | (1,876) | (2,051) |
| Total Cash Balance, Ending..... | <u>5,719</u> | <u>5,316</u> | <u>4,659</u> |

Conrad Weiser Memorial Park Trust Fund

This fund was created to provide for control, management, supervision, restoration and improvement of the Conrad Weiser Memorial Park, Berks County. Source of revenue for the fund is interest from the \$20,000 perpetual endowment created by the estate of Colonel Conrad Weiser.

Statement of Cash Receipts and Disbursements:
(Dollar Amounts In Thousands)

| | 2022-23 Actual | 2023-24 Available | 2024-25 Estimated |
|--|---------------------------|------------------------------|------------------------------|
| Cash Balance, Beginning..... | 79 | 82 | 86 |
| Receipts: | | | |
| Interest..... | 3 | 4 | 4 |
| Total Receipts..... | 3 | 4 | 4 |
| Total Funds Available..... | 82 | 86 | 90 |
| Disbursements: | | | |
| Historical and Museum Commission..... | - | - | - |
| Total Disbursements..... | - | - | - |
| Total Cash Balance, Ending..... | 82 | 86 | 90 |

Pennsylvania Historical and Museum Commission Trust Fund

This fund, created by Act 113 of 1931, is administered by the Governor, Auditor General, State Treasurer and the Pennsylvania Historical and Museum Commission. The interest received from investment of the \$33,000 perpetual endowment to this fund in bonds of the commonwealth or any of its political subdivisions is credited to the fund. Interest earned on investments is used for the restoration, maintenance and improvement of the Cornwall Charcoal Furnace, Cornwall Borough, Lebanon County.

Statement of Cash Receipts and Disbursements:
(Dollar Amounts In Thousands)

| | <u>2022-23</u> Actual | <u>2023-24</u> Available | <u>2024-25</u> Estimated |
|---|---------------------------------|------------------------------------|------------------------------------|
| Cash Balance, Beginning | 197 | 204 | 215 |
| Receipts: | | | |
| Interest..... | 7 | 11 | 10 |
| Total Receipts | <u>7</u> | <u>11</u> | <u>10</u> |
| Total Funds Available | <u>204</u> | <u>215</u> | <u>225</u> |
| Disbursements: | | | |
| Historical and Museum Commission..... | - | - | - |
| Total Disbursements | <u>-</u> | <u>-</u> | <u>-</u> |
| Total Cash Balance, Ending | <u><u>204</u></u> | <u><u>215</u></u> | <u><u>225</u></u> |