

**Indiana Historical Society  
2011 Local History Services Survey: Management**

Data was collected in the spring of 2011 from historical societies and history museums in Indiana in both paper and electronic forms. In the data described below, 102 organizations responded to the survey; 47 reported that they are all-volunteer while 51 have some paid staff. (The four organizations that did not report staffing were excluded from the all-volunteer and paid staff organizational comparisons.)

**Overall information**

- **Most organizations reported that their financial situation was stable (40%) or uncomfortable (40%).** The percentage of organizations that described their situation as “desperate” increased from 4% in 2009 to 10% in 2011, while those describing it as “uncomfortable” decreased from 45% to 40%. About 10% of groups described their situation as “comfortable” in both 2009 and in 2011.
- **16% of responding organizations indicated that they were not sure if they complied with federal, state and local laws and reporting requirements** (with only a slight difference between all-volunteer organizations and those with paid staff.)
- **Only 43% reported passing an annual budget.** 65% reported having a budget in 2009.
- **Less than 40% of organizations reported having a system of checks and balances or segregation of duties for financial transactions.**
- **Only 12% of organizations reported compiling a list of maintenance needs to be incorporated into their budgets annually.** However, 55% reported that routine items are completed on a calendar basis. Only 12% reported that “little is done until there is a major need.”
- **In response to a question about resource allocation, 30% of organizations selected the statement: “We have too few resources to think about allocating resources based on the mission.”** 19% of organizations with paid staff selected this response while 38% of all-volunteer organizations did.

***Changes in financial situation over time: Differences between organizations with paid staff and all-volunteer organizations.\****

- All-volunteer organizations were responsible for the overall increase in those describing their situation as “desperate” (from 4% in 2009 to 10% in 2011).
- Only 12% of all-volunteer organizations described their situation as “comfortable” in 2011, whereas 20% of them did in 2009.
- The percentage of organizations with paid staff that described their situation as “comfortable” (5%) and “desperate” (8%) has not changed.
- All-volunteer organizations appeared to move out of “uncomfortable” and into either “desperate” or “stable.”
- Organizations with paid staff appeared to move from “stable” to “uncomfortable” if they are experienced any change at all.

\*Note: These trends are based on comparing data provided by survey respondents in 2009 and 2011; however, the organizations that responded to each survey are NOT the same. An examination of the responses provided by 32 organizations that did report in both 2009 and 2011 shows a similar pattern.