

### Program Budget Comparison

The following table summarizes the total Legislative budget by year, type of expenditure, and source of funding.

| Program Budget Comparison         |                     |                        |                            |                            |                          |                          |                    |                      |
|-----------------------------------|---------------------|------------------------|----------------------------|----------------------------|--------------------------|--------------------------|--------------------|----------------------|
| Budget Item                       | Base<br>Fiscal 2014 | Approp.<br>Fiscal 2015 | Legislative<br>Budget 2016 | Legislative<br>Budget 2017 | Biennium<br>Fiscal 14-15 | Biennium<br>Fiscal 16-17 | Biennium<br>Change | Biennium<br>% Change |
| FTE                               | 14.75               | 14.75                  | 15.50                      | 15.50                      | 14.75                    | 15.50                    | 0.75               | 5.08 %               |
| Personal Services                 | 800,479             | 864,212                | 952,425                    | 953,229                    | 1,664,691                | 1,905,654                | 240,963            | 14.47 %              |
| Operating Expenses                | 298,005             | 352,307                | 373,848                    | 374,278                    | 650,312                  | 748,126                  | 97,814             | 15.04 %              |
| Equipment & Intangible Assets     | 106,779             | 54,810                 | 58,297                     | 58,847                     | 161,589                  | 117,144                  | (44,445)           | (27.50)%             |
| <b>Total Costs</b>                | <b>\$1,205,263</b>  | <b>\$1,271,329</b>     | <b>\$1,384,570</b>         | <b>\$1,386,354</b>         | <b>\$2,476,592</b>       | <b>\$2,770,924</b>       | <b>\$294,332</b>   | <b>11.88 %</b>       |
| General Fund                      | 1,058,741           | 1,124,446              | 1,236,262                  | 1,237,546                  | 2,183,187                | 2,473,808                | 290,621            | 13.31 %              |
| State/Other Special Rev.<br>Funds | 113,185             | 112,781                | 113,931                    | 114,055                    | 225,966                  | 227,986                  | 2,020              | 0.89 %               |
| Federal Spec. Rev. Funds          | 0                   | 0                      | 0                          | 0                          | 0                        | 0                        | 0                  | 0.00 %               |
| Proprietary Funds                 | 33,337              | 34,102                 | 34,377                     | 34,753                     | 67,439                   | 69,130                   | 1,691              | 2.51 %               |
| <b>Total Funds</b>                | <b>\$1,205,263</b>  | <b>\$1,271,329</b>     | <b>\$1,384,570</b>         | <b>\$1,386,354</b>         | <b>\$2,476,592</b>       | <b>\$2,770,924</b>       | <b>\$294,332</b>   | <b>11.88 %</b>       |

### Program Description

The Research Center Program consists of the library, archives, and photograph archives functions. This program acquires, organizes, preserves, makes accessible to the public, and assists researchers with published materials, historic records and manuscripts, photographs and related media, and oral histories illustrative of the history of Montana and the surrounding region. By statute, this program houses the official archives of state government.

### Program Highlights

| Research Center<br>Major Budget Highlights  |
|---|
| <ul style="list-style-type: none"> <li>The legislature approved a biennial 10.5% increase in ongoing funding for this program that is driven by: <ul style="list-style-type: none"> <li>The addition of 1.00 permanent FTE for a Digital Project Coordinator position</li> <li>Increases in fixed costs, which are driven by rates within the Department of Administration</li> <li>Increases in personal services consisting of agency adjustments (such as longevity, training assignments, reclassifications, etc.)</li> </ul> </li> </ul> |

### Funding

The following table shows program funding by source from all sources of authority.

| Montana Historical Society, 02-Research Center<br>Funding by Source of Authority |                    |                             |                            |                      |                      |
|--|--------------------|-----------------------------|----------------------------|----------------------|----------------------|
| Funds  | HB2                | Non-Budgeted<br>Proprietary | Statutory<br>Appropriation | Total<br>All Sources | % Total<br>All Funds |
| 01100 General Fund   | 2,473,808          | 0                           | 0                          | 2,473,808            | 89.28 %              |
| 02131 HIS/Dept of Commerce TVMT MOU  | 0                  | 0                           | 0                          | 0                    | 0.00 %               |
| 02853 Accommodation Tax  | 227,986            | 0                           | 0                          | 227,986              | 100.00 %             |
| <b>State Special Total</b>   | <b>\$227,986</b>   | <b>\$0</b>                  | <b>\$0</b>                 | <b>\$227,986</b>     | <b>8.23 %</b>        |
| 03102 Federal Grants   | 0                  | 0                           | 0                          | 0                    | 0.00 %               |
| <b>Federal Special Total</b>   | <b>\$0</b>         | <b>\$0</b>                  | <b>\$0</b>                 | <b>\$0</b>           | <b>0.00 %</b>        |
| 06072 Misc Enterprise-Historical Soc   | 33,292             | 0                           | 0                          | 33,292               | 48.16 %              |
| 06076 MHS Library Enterprise Funds   | 35,838             | 0                           | 0                          | 35,838               | 51.84 %              |
| <b>Proprietary Total</b>   | <b>\$69,130</b>    | <b>\$0</b>                  | <b>\$0</b>                 | <b>\$69,130</b>      | <b>2.49 %</b>        |
| <b>Total All Funds</b>   | <b>\$2,770,924</b> | <b>\$0</b>                  | <b>\$0</b>                 | <b>\$2,770,924</b>   |                      |

This program is funded from general fund, state special revenue from the lodging facility use tax, and proprietary funds. Proprietary revenue comes from the sale of historic photo reproductions and images.

### Budget Summary by Category

The following summarizes the total budget utilizing the FY 2015 legislative base, present law adjustments, and new proposals.

| Budget Summary by Category |                               |                               |                                  |                      |                               |                               |                                  |                      |
|----------------------------|-------------------------------|-------------------------------|----------------------------------|----------------------|-------------------------------|-------------------------------|----------------------------------|----------------------|
| -----General Fund-----     |                               |                               |                                  |                      | -----Total Funds-----         |                               |                                  |                      |
| Budget Item                | Leg.<br>Budget<br>Fiscal 2016 | Leg.<br>Budget<br>Fiscal 2017 | Leg.<br>Biennium<br>Fiscal 16-17 | Percent<br>of Budget | Leg.<br>Budget<br>Fiscal 2016 | Leg.<br>Budget<br>Fiscal 2017 | Leg.<br>Biennium<br>Fiscal 16-17 | Percent<br>of Budget |
| 2015 Budget                | 1,124,446                     | 1,124,446                     | 2,248,892                        | 90.91 %              | 1,271,329                     | 1,271,329                     | 2,542,658                        | 91.76 %              |
| PL Adjustments             | 44,735                        | 46,186                        | 90,921                           | 3.68 %               | 46,160                        | 48,111                        | 94,271                           | 3.40 %               |
| New Proposals              | 67,081                        | 66,914                        | 133,995                          | 5.42 %               | 67,081                        | 66,914                        | 133,995                          | 4.84 %               |
| <b>Total Budget</b>        | <b>\$1,236,262</b>            | <b>\$1,237,546</b>            | <b>\$2,473,808</b>               |                      | <b>\$1,384,570</b>            | <b>\$1,386,354</b>            | <b>\$2,770,924</b>               |                      |

### Present Law Adjustments

The "Present Law Adjustments" table shows the adopted changes from the FY 2015 legislative appropriation. Each is discussed in the narrative that follows.

| Present Law Adjustments                             |               |                 |                  |                    |                       |               |                 |                  |                    |                 |
|---|---------------|-----------------|------------------|--------------------|-----------------------|---------------|-----------------|------------------|--------------------|-----------------|
| -----Fiscal 2016-----                               |               |                 |                  |                    | -----Fiscal 2017----- |               |                 |                  |                    |                 |
|   | FTE           | General<br>Fund | State<br>Special | Federal<br>Special | Total<br>Funds        | FTE           | General<br>Fund | State<br>Special | Federal<br>Special | Total<br>Funds  |
| DP 100 - Other PS                                   | 0.00          | 13,842          | 0                | 0                  | 13,842                | 0.00          | 14,813          | 0                | 0                  | 14,813          |
| DP 515 - State Share Health Insurance               | 0.00          | 7,290           | 0                | 0                  | 7,290                 | 0.00          | 7,290           | 0                | 0                  | 7,290           |
| DP 525 - Fixed Costs                                | 0.00          | 23,417          | 615              | 0                  | 22,702                | 0.00          | 23,659          | 608              | 0                  | 22,984          |
| DP 527 - Inflation and Deflation                    | 0.00          | 194             | 558              | 0                  | 2,427                 | 0.00          | 438             | 688              | 0                  | 3,126           |
| DP 550 - Motor Pool Rate Adjustments                | 0.00          | (8)             | (23)             | 0                  | (101)                 | 0.00          | (14)            | (22)             | 0                  | (102)           |
| DP 200444 - Statewide 4% FTE Reduction - Program 02 | (0.25)        | 0               | 0                | 0                  | 0                     | (0.25)        | 0               | 0                | 0                  | 0               |
| <b>Grand Total All Present Law Adjustments</b>      | <b>(0.25)</b> | <b>\$44,735</b> | <b>\$1,150</b>   | <b>\$0</b>         | <b>\$46,160</b>       | <b>(0.25)</b> | <b>\$46,186</b> | <b>\$1,274</b>   | <b>\$0</b>         | <b>\$48,111</b> |

\*\*Total Funds" amount includes funding from sources other than General Fund, State Special, or Federal Special (i.e. Proprietary).

DP 100 - Other PS -

The legislature adopted personal service adjustments outside of state share health insurance increases, vacancy savings, and the executive implementation of the 2015 pay increase.

DP 515 - State Share Health Insurance -

The legislature provided appropriation authority for the state share of health insurance, as adopted by the 2013 Legislature.

DP 525 - Fixed Costs -

The legislature adopted proprietary rates for fixed costs charged to state agencies for services such as information technology or rent and grounds maintenance within the capitol complex. Rates for messenger services, legislative audit, grounds maintenance, records management, agency legal costs, and the statewide cost allocation plan were adopted as proposed by the executive. The legislature lowered proprietary rates for warrant writer, payroll services, SABHRS, SITSD fees, and rent. The legislature increased insurance premiums to provide for increased costs of claims and to establish a reserve for the insurance fund.

DP 527 - Inflation and Deflation -

The legislature adopted inflation/deflation factors for budgeted expenditures such as books and motor pool. The legislature concurred with the executive on the factors with the exception of gasoline, aviation gasoline, diesel fuel, and jet fuel. For these factors the legislature further deflated costs to align the budget with more current information on declining prices of oil and gas projected to continue into the 2017 biennium.

DP 550 - Motor Pool Rate Adjustments -

The legislature adopted a reduction to the motor pool rates.

DP 200444 - Statewide 4% FTE Reduction - Program 02 -

The 2015 biennium budget included a 4% vacancy savings reduction. Language included in the boilerplate of HB 2 passed by the 2013 Legislature, indicated legislative intent that the 4% vacancy savings be made permanent as an FTE reduction for the 2017 biennium. Change package 200444 includes a reduction of 0.25 FTE each year.

**New Proposals**

The "New Proposals" table shows the adopted changes from the FY 2015 legislative appropriation. Each is discussed in the narrative that follows.

| New Proposals                           | Fiscal 2016 |                 |               |                 |                 | Fiscal 2017 |                 |               |                 |                 |
|---|-------------|-----------------|---------------|-----------------|-----------------|-------------|-----------------|---------------|-----------------|-----------------|
|   | FTE         | General Fund    | State Special | Federal Special | Total Funds     | FTE         | General Fund    | State Special | Federal Special | Total Funds     |
| DP 200001 - Digital Project Coordinator | 1.00        | 67,081          | 0             | 0               | 67,081          | 1.00        | 66,914          | 0             | 0               | 66,914          |
| <b>Total</b>                            | <b>1.00</b> | <b>\$67,081</b> | <b>\$0</b>    | <b>\$0</b>      | <b>\$67,081</b> | <b>1.00</b> | <b>\$66,914</b> | <b>\$0</b>    | <b>\$0</b>      | <b>\$66,914</b> |

\*\*Total Funds" amount includes funding from sources other than General Fund, State Special, or Federal Special (i.e. Proprietary).

DP 200001 - Digital Project Coordinator -

The legislature appropriated general fund for a new Digital Project Coordinator position at MHS to make digital projects more unified and consistent and to make more materials freely available online.