

**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 Fiscal 2014	Approp. Fiscal 2015	Legislative Budget 2016	Legislative Budget 2017	Biennium Fiscal 14-15	Biennium Fiscal 16-17	Biennium Change	Biennium % Change
FTE	5.85	5.85	4.95	4.95	5.85	4.95	(0.90)	(15.38)%
Personal Services	252,483	260,599	272,684	271,647	513,082	544,331	31,249	6.09 %
Operating Expenses	119,996	125,249	134,352	133,757	245,245	268,109	22,864	9.32 %
<b>Total Costs</b>	<b>\$372,479</b>	<b>\$385,848</b>	<b>\$407,036</b>	<b>\$405,404</b>	<b>\$758,327</b>	<b>\$812,440</b>	<b>\$54,113</b>	<b>7.14 %</b>
General Fund	252,483	260,101	272,684	271,647	512,584	544,331	31,747	6.19 %
State/Other Special Rev. Funds	103,639	104,057	109,172	108,597	207,696	217,769	10,073	4.85 %
Proprietary Funds	16,357	21,690	25,180	25,160	38,047	50,340	12,293	32.31 %
<b>Total Funds</b>	<b>\$372,479</b>	<b>\$385,848</b>	<b>\$407,036</b>	<b>\$405,404</b>	<b>\$758,327</b>	<b>\$812,440</b>	<b>\$54,113</b>	<b>7.14 %</b>

**Program Description**

The Education Program is comprised of three primary activities: Outreach and Interpretation, Historic Signs, and the Volunteer Program. The Education Program provides educational public programming of all types, both at the society's headquarters and throughout the state, for a wide range of audiences; plans and produces educational publications, curriculum materials, and instructional literature for broad distribution; plans and produces interpretive, place-based publications, articles, brochures, and tours for statewide distribution/implementation; provides reference services to the general public, teachers, students, technical users, and other like-minded institutions and organizations; oversees the National Register Sign Program for the State of Montana, producing interpretive signage for eligible structures and sites in all parts of the state; assists in the planning, production, and placement of non-Register permanent and/or temporary signage in all parts of the state; and oversees the society's volunteer program, coordinating volunteers, and volunteer activities society-wide.

**Program Highlights**

<b>Education Program Major Budget Highlights</b>
<ul style="list-style-type: none"> <li>• The legislature approved a biennial 7.2% budget increase in ongoing funding for this program that is driven by:                             <ul style="list-style-type: none"> <li>◦ Increases in fixed costs, inflation, and deflation, which are driven by rates within the Department of Administration</li> </ul> </li> </ul>

**Funding**

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

Montana Historical Society, 05-Education Program Funding by Source of Authority						
Funds	HB2	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources	% Total All Funds	
01100 General Fund	544,331	0	0	544,331	46.35 %	
02123 Sites & Signs	0	0	362,046	362,046	62.44 %	
02853 Accommodation Tax	217,769	0	0	217,769	37.56 %	
<b>State Special Total</b>	<b>\$217,769</b>	<b>\$0</b>	<b>\$362,046</b>	<b>\$579,815</b>	<b>49.37 %</b>	
<b>Federal Special Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>0.00 %</b>	
06013 SHPO ENTERPRISE FUND	0	0	0	0	0.00 %	
06022 MHS Education Enterprise Funds	50,340	0	0	50,340	100.00 %	
06071 Merchandise - Historical Soc	0	0	0	0	0.00 %	
<b>Proprietary Total</b>	<b>\$50,340</b>	<b>\$0</b>	<b>\$0</b>	<b>\$50,340</b>	<b>4.29 %</b>	
<b>Total All Funds</b>	<b>\$812,440</b>	<b>\$0</b>	<b>\$362,046</b>	<b>\$1,174,486</b>		

The legislatively approved budget funds this program primarily from general fund.

The state special revenue appropriated in HB 2 is from a 2.6% allocation of the lodging facility use tax and may be used only for the purpose of historical interpretation and costs relating to the Scriver collection. The state special revenue appropriated via a statutory appropriation is from a 1% allocation of the lodging facility use tax and may be used for the installation or maintenance of roadside historical signs and historic sites.

Proprietary funds are the smallest revenue source for this program and are derived from program fees and education enterprises. The approved budget reduces the reliance on proprietary funds which derive from the sale of textbooks, increases state general fund for personal services, and increases the accommodations tax for operating expenses.

**Budget Summary by Category**

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

Budget Item	-----General Fund-----				-----Total Funds-----			
	Leg. Budget Fiscal 2016	Leg. Budget Fiscal 2017	Leg. Biennium Fiscal 16-17	Percent of Budget	Leg. Budget Fiscal 2016	Leg. Budget Fiscal 2017	Leg. Biennium Fiscal 16-17	Percent of Budget
2015 Budget	260,101	260,101	520,202	95.57 %	385,848	385,848	771,696	94.98 %
PL Adjustments	12,583	11,546	24,129	4.43 %	21,188	19,556	40,744	5.02 %
New Proposals	0	0	0	0.00 %	0	0	0	0.00 %
<b>Total Budget</b>	<b>\$272,684</b>	<b>\$271,647</b>	<b>\$544,331</b>		<b>\$407,036</b>	<b>\$405,404</b>	<b>\$812,440</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.

	-----Fiscal 2016-----					-----Fiscal 2017-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 100 - Other PS	0.00	(34,343)	(498)	0	(34,841)	0.00	(35,380)	(498)	0	(35,878)
DP 515 - State Share Health Insurance	0.00	2,916	0	0	2,916	0.00	2,916	0	0	2,916
DP 520 - Fully Fund 2015 Legislatively Authorized FTE	0.00	44,010	0	0	44,010	0.00	44,010	0	0	44,010
DP 525 - Fixed Costs	0.00	0	0	0	3,490	0.00	0	0	0	3,470
DP 527 - Inflation and Deflation	0.00	0	5,901	0	5,901	0.00	0	5,330	0	5,330
DP 550 - Motor Pool Rate Adjustments	0.00	0	(288)	0	(288)	0.00	0	(292)	0	(292)
DP 500444 - Statewide 4% FTE Reduction - Program 05	(0.90)	0	0	0	0	(0.90)	0	0	0	0
<b>Grand Total All Present Law Adjustments</b>	<b>(0.90)</b>	<b>\$12,583</b>	<b>\$5,115</b>	<b>\$0</b>	<b>\$21,188</b>	<b>(0.90)</b>	<b>\$11,546</b>	<b>\$4,540</b>	<b>\$0</b>	<b>\$19,556</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 520 - Fully Fund 2015 Legislatively Authorized FTE -

The legislature provided appropriation authority to restore personal services funding to create a vacancy savings rate of zero.

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 500444 - Statewide 4% FTE Reduction - Program 05 -

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.