

Agency Budget Comparison

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

Agency 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	60.83	60.83	59.39	59.39	60.83	59.39	(1.44)	(2.37)%
Personal Services	3,222,166	3,427,285	3,613,085	3,614,462	6,649,451	7,227,547	578,096	8.69 %
Operating Expenses	1,646,599	1,715,822	1,823,598	1,777,035	3,362,421	3,600,633	238,212	7.08 %
Equipment & Intangible Assets	158,163	61,605	92,998	94,010	219,768	187,008	(32,760)	(14.91)%
Grants	82,098	87,120	87,120	87,120	169,218	174,240	5,022	2.97 %
Total Costs	\$5,109,026	\$5,291,832	\$5,616,801	\$5,572,627	\$10,400,858	\$11,189,428	\$788,570	7.58 %
General Fund	3,087,505	3,188,640	3,428,853	3,384,826	6,276,145	6,813,679	537,534	8.56 %
State/Other Special Rev. Funds	712,165	714,464	748,673	748,111	1,426,629	1,496,784	70,155	4.92 %
Federal Spec. Rev. Funds	736,335	774,554	760,714	761,435	1,510,889	1,522,149	11,260	0.75 %
Proprietary Funds	573,021	614,174	678,561	678,255	1,187,195	1,356,816	169,621	14.29 %
Total Funds	\$5,109,026	\$5,291,832	\$5,616,801	\$5,572,627	\$10,400,858	\$11,189,428	\$788,570	7.58 %

Page Reference

Legislative Budget Analysis, E-137

Executive Budget Comparison

The following table compares the legislative budget for the 2017 biennium to the budget requested by the Governor, by type of expenditure and source of funding.

Executive Budget Comparison								
Budget Item	Base Budget Fiscal 2014	Executive Budget Fiscal 2016	Legislative Budget Fiscal 2016	Leg — Exec. Difference Fiscal 2016	Executive Budget Fiscal 2017	Legislative Budget Fiscal 2017	Leg — Exec. Difference Fiscal 2017	Biennium Difference Fiscal 16-17
FTE	60.83	59.39	59.39	0.00	59.39	59.39	0.00	0.00
Personal Services	3,222,166	3,672,203	3,613,085	(59,118)	3,675,915	3,614,462	(61,453)	(120,571)
Operating Expenses	1,646,599	1,767,126	1,823,598	56,472	1,721,887	1,777,035	55,148	111,620
Equipment & Intangible Assets	158,163	160,130	92,998	(67,132)	161,144	94,010	(67,134)	(134,266)
Grants	82,098	82,098	87,120	5,022	82,098	87,120	5,022	10,044
Total Costs	\$5,109,026	\$5,681,557	\$5,616,801	(\$64,756)	\$5,641,044	\$5,572,627	(\$68,417)	(\$133,173)
General Fund	3,087,505	3,515,939	3,428,853	(87,086)	3,475,422	3,384,826	(90,596)	(177,682)
State/other Special Rev. Funds	712,165	721,825	748,673	26,848	721,951	748,111	26,160	53,008
Federal Spec. Rev. Funds	736,335	768,998	760,714	(8,284)	769,030	761,435	(7,595)	(15,879)
Other	573,021	674,795	678,561	3,766	674,641	678,255	3,614	7,380
Total Funds	\$5,109,026	\$5,681,557	\$5,616,801	(\$64,756)	\$5,641,044	\$5,572,627	(\$68,417)	(\$133,173)

The legislatively approved budget includes appropriations for a new Digital Project Coordinator position and additional proprietary authority over the 2017 biennium. It does not include the executive's implementation of the 2015 pay increase. General fund decreased and state special revenue funds increased when compared to the executive's initial proposed budget.

Agency Highlights

**Montana Historical Society
Major Budget Highlights**

- The legislatively approved budget includes increases in fixed costs, as well as a new proposal adding 1.00 FTE

Funding

The following table shows proposed agency funding by source of authority as proposed. Funding for each program is discussed in detail in the individual program narratives that follow.

Total Montana Historical Society Funding by Source of Authority 2017 Biennium Budget - Montana Historical Society						
Funds	HB2	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources	% Total All Funds	
General Fund	6,813,679	0	0	6,813,679	57.95 %	
State Special Total	1,496,784	0	567,583	2,064,367	17.56 %	
Federal Special Total	1,522,149	0	0	1,522,149	12.95 %	
Proprietary Total	1,356,816	0	0	1,356,816	11.54 %	
Other Total	0	0	0	0	0.00 %	
Total All Funds	\$11,189,428	\$0	\$567,583	\$11,757,011		
Percent - Total All Sources	95.17 %	0.00 %	4.83 %			

General fund is the primary funding source for this agency.

State special revenue includes:

- Donations to the Society and the Original Governor's Mansion
- An allocation of the lodging facility use tax

The remaining authority is made up of Federal Special and Proprietary funds.

Funding sources are discussed in more detail in the program narratives that follow.

Statutory Appropriations

The Montana Historical Society has two statutory appropriations that support specific programs. The agency receives:

- A 1% allocation from the lodging facility use tax for the installation or maintenance of roadside historical signs and historic sites
- 25% of the revenue from the sales of Lewis and Clark bicentennial license plates for projects related to Lewis and Clark

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								
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	3,188,640	3,188,640	6,377,280	93.60 %	5,291,832	5,291,832	10,583,664	94.59 %
PL Adjustments	173,132	129,272	302,404	4.44 %	222,888	178,881	401,769	3.59 %
New Proposals	67,081	66,914	133,995	1.97 %	102,081	101,914	203,995	1.82 %
Total Budget	\$3,428,853	\$3,384,826	\$6,813,679		\$5,616,801	\$5,572,627	\$11,189,428	

Program Budget Comparison

The following table summarizes the total proposed 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	18.43	18.43	17.19	17.19	18.43	17.19	(1.24)	(6.73)%
Personal Services	974,162	1,079,832	1,086,409	1,089,342	2,053,994	2,175,751	121,757	5.93 %
Operating Expenses	438,632	426,067	439,639	392,237	864,699	831,876	(32,823)	(3.80)%
Equipment & Intangible Assets	27,009	0	27,906	28,368	27,009	56,274	29,265	108.35 %
Total Costs	\$1,439,803	\$1,505,899	\$1,553,954	\$1,509,947	\$2,945,702	\$3,063,901	\$118,199	4.01 %
General Fund	1,011,480	1,058,978	1,104,173	1,060,374	2,070,458	2,164,547	94,089	4.54 %
State/Other Special Rev. Funds	97,768	99,831	128,039	127,921	197,599	255,960	58,361	29.54 %
Federal Spec. Rev. Funds	88,452	97,557	72,844	73,073	186,009	145,917	(40,092)	(21.55)%
Proprietary Funds	242,103	249,533	248,898	248,579	491,636	497,477	5,841	1.19 %
Total Funds	\$1,439,803	\$1,505,899	\$1,553,954	\$1,509,947	\$2,945,702	\$3,063,901	\$118,199	4.01 %

Page Reference

Legislative Budget Analysis, E-140

Funding

The program is funded with a combination of:

- General fund
- State special revenue funds from membership fees, donations, and a portion of the lodging facility use tax
- Federal funds through indirect cost recoveries
- Proprietary funds from museum entrance fees and merchandise sales

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								
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	1,058,978	1,058,978	2,117,956	97.85 %	1,505,899	1,505,899	3,011,798	98.30 %
PL Adjustments	45,195	1,396	46,591	2.15 %	48,055	4,048	52,103	1.70 %
New Proposals	0	0	0	0.00 %	0	0	0	0.00 %
Total Budget	\$1,104,173	\$1,060,374	\$2,164,547		\$1,553,954	\$1,509,947	\$3,063,901	

Present Law Adjustments -

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

Present Law Adjustments										
-----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	20,816	(857)	(36,495)	(23,914)	0.00	23,896	(906)	(36,495)	(20,981)
DP 510 - Legislative Audit - HB 2 2014 Fixed Costs (Restricted/Biennia	0.00	38,426	0	0	38,426	0.00	0	0	0	0
DP 515 - State Share Health Insurance	0.00	7,776	486	0	8,748	0.00	7,776	486	0	8,748
DP 520 - Fully Fund 2015 Legislatively Authorized FTE	0.00	0	2,253	9,938	21,743	0.00	0	2,253	9,938	21,743
DP 525 - Fixed Costs	0.00	(24,925)	24,829	1,832	(1,777)	0.00	(32,286)	24,760	2,061	(9,199)
DP 526 - 2017 Biennium Legislative Audit (RST/BIEN)	0.00	1,075	0	0	1,075	0.00	0	0	0	0
DP 527 - Inflation and Deflation	0.00	424	0	0	424	0.00	408	0	0	408
DP 531 - SITSD Rate Adjustment	0.00	2,398	2,119	17	4,842	0.00	2,398	2,119	17	4,842
DP 532 - General Liability Insurance Rate Adjustment	0.00	(703)	(622)	(5)	(1,420)	0.00	(703)	(622)	(5)	(1,420)
DP 550 - Motor Pool Rate Adjustments	0.00	(92)	0	0	(92)	0.00	(93)	0	0	(93)
DP 100444 - Statewide 4% FTE Reduction - Program 01	(1.24)	0	0	0	0	(1.24)	0	0	0	0
Grand Total All Present Law Adjustments	(1.24)	\$45,195	\$28,208	(\$24,713)	\$48,055	(1.24)	\$1,396	\$28,090	(\$24,484)	\$4,048

*"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 510 - Legislative Audit - HB 2 2014 Fixed Costs (Restricted/Biennia -

The legislature provided a restricted biennial appropriation for the legislative audit costs. The funding is established at the level of the 2015 biennial appropriation contained in HB 2 as enacted by the 2013 Legislature.

DP 515 - State Share Health Insurance -

The legislature provided appropriation authority for the state share of health insurance, as adopted by the 2015 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 526 - 2017 Biennium Legislative Audit (RST/BIEN) -

The legislature adjusted legislative audit costs and funding based on the current estimate of the Legislative Auditor.

DP 527 - Inflation and Deflation -

The legislature adopted inflation/deflation factors for budgeted expenditures such as food or electricity. 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 531 - SITSD Rate Adjustment -

The legislature approved an increase for fixed cost rates included in state agency budgets for information technology services provided by the State Information Technology Services Division (SITSD).

DP 532 - General Liability Insurance Rate Adjustment -

The legislature reduced the rate assessed to state agencies for general liability insurance provided by the Risk Management and Tort Defense Division.

DP 550 - Motor Pool Rate Adjustments -

The legislature adopted a reduction to the motor pool rates.

DP 100444 - Statewide 4% FTE Reduction - Program 01 -

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 100444 includes a reduction of 1.24 FTE each year.

Program Budget Comparison

The following table summarizes the total proposed 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	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)%
Total Costs	\$1,205,263	\$1,271,329	\$1,384,570	\$1,386,354	\$2,476,592	\$2,770,924	\$294,332	11.88 %
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. 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 %
Total Funds	\$1,205,263	\$1,271,329	\$1,384,570	\$1,386,354	\$2,476,592	\$2,770,924	\$294,332	11.88 %

Page Reference

Legislative Budget Analysis, E-143

Funding

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								
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	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 %
Total Budget	\$1,236,262	\$1,237,546	\$2,473,808		\$1,384,570	\$1,386,354	\$2,770,924	

Present Law Adjustments -

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

Present Law Adjustments										
-----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	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
Grand Total All Present Law Adjustments	(0.25)	\$44,735	\$1,150	\$0	\$46,160	(0.25)	\$46,186	\$1,274	\$0	\$48,111

***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 2015 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 food or electricity. 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 changes from the legislative appropriation for FY 15 to the proposed budget.

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
Total	1.00	\$67,081	\$0	\$0	\$67,081	1.00	\$66,914	\$0	\$0	\$66,914

*"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.

Program Budget Comparison

The following table summarizes the total proposed 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	8.05	8.05	8.00	8.00	8.05	8.00	(0.05)	(0.62)%
Personal Services	401,585	422,405	457,295	456,861	823,990	914,156	90,166	10.94 %
Operating Expenses	510,589	525,117	555,599	556,042	1,035,706	1,111,641	75,935	7.33 %
Equipment & Intangible Assets	24,375	6,795	6,795	6,795	31,170	13,590	(17,580)	(56.40)%
Total Costs	\$936,549	\$954,317	\$1,019,689	\$1,019,698	\$1,890,866	\$2,039,387	\$148,521	7.85 %
General Fund	535,962	553,815	619,150	619,151	1,089,777	1,238,301	148,524	13.63 %
State/Other Special Rev. Funds	397,573	397,795	397,531	397,538	795,368	795,069	(299)	(0.04)%
Proprietary Funds	3,014	2,707	3,008	3,009	5,721	6,017	296	5.17 %
Total Funds	\$936,549	\$954,317	\$1,019,689	\$1,019,698	\$1,890,866	\$2,039,387	\$148,521	7.85 %

Page Reference

Legislative Budget Analysis, E-147

Funding

The program is funded through a combination of general fund, state special revenue from the lodging facility use tax, and donations at the Original Governor's Mansion, and proprietary funds generated through the sales of books, copies, and photographs, and the rental of traveling exhibits.

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								
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	553,815	553,815	1,107,630	89.45 %	954,317	954,317	1,908,634	93.59 %
PL Adjustments	65,335	65,336	130,671	10.55 %	65,372	65,381	130,753	6.41 %
New Proposals	0	0	0	0.00 %	0	0	0	0.00 %
Total Budget	\$619,150	\$619,151	\$1,238,301		\$1,019,689	\$1,019,698	\$2,039,387	

Present Law Adjustments -

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

Present Law Adjustments										
-----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	31,002	0	0	31,002	0.00	30,568	0	0	30,568
DP 515 - State Share Health Insurance	0.00	3,888	0	0	3,888	0.00	3,888	0	0	3,888
DP 525 - Fixed Costs	0.00	30,445	134	0	30,880	0.00	30,880	83	0	31,265
DP 527 - Inflation and Deflation	0.00	0	(362)	0	(362)	0.00	0	(304)	0	(304)
DP 550 - Motor Pool Rate Adjustments	0.00	0	(36)	0	(36)	0.00	0	(36)	0	(36)
DP 300444 - Statewide 4% FTE Reduction - Program 03	(0.05)	0	0	0	0	(0.05)	0	0	0	0
Grand Total All Present Law Adjustments	(0.05)	\$65,335	(\$264)	\$0	\$65,372	(0.05)	\$65,336	(\$257)	\$0	\$65,381

***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 2015 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 food or electricity. 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 300444 - Statewide 4% FTE Reduction - Program 03 -

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 300444 includes a reduction of 0.05 FTE each year.

Program Budget Comparison

The following table summarizes the total proposed 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	5.00	5.00	5.00	5.00	5.00	5.00	0.00	0.00 %
Personal Services	290,366	285,277	309,637	308,877	575,643	618,514	42,871	7.45 %
Operating Expenses	167,734	163,683	168,347	168,376	331,417	336,723	5,306	1.60 %
Total Costs	\$458,100	\$448,960	\$477,984	\$477,253	\$907,060	\$955,237	\$48,177	5.31 %
General Fund	189,968	152,948	155,946	155,562	342,916	311,508	(31,408)	(9.16)%
Proprietary Funds	268,132	296,012	322,038	321,691	564,144	643,729	79,585	14.11 %
Total Funds	\$458,100	\$448,960	\$477,984	\$477,253	\$907,060	\$955,237	\$48,177	5.31 %

Page Reference

Legislative Budget Analysis, E-150

Funding

The program is funded with a combination of general fund and proprietary funds. Proprietary funds are derived from subscription sales for the magazine and sales of books published by the program. General fund pays a portion of 2.00 FTE, the program manager and an editor, involved in publishing *Montana The Magazine of Western History*.

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. 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	152,948	152,948	305,896	98.20 %	448,960	448,960	897,920	94.00 %
PL Adjustments	2,998	2,614	5,612	1.80 %	29,024	28,293	57,317	6.00 %
New Proposals	0	0	0	0.00 %	0	0	0	0.00 %
Total Budget	\$155,946	\$155,562	\$311,508		\$477,984	\$477,253	\$955,237	

Present Law Adjustments -

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

Present Law Adjustments										
-----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	1,774	0	0	21,930	0.00	1,390	0	0	21,170
DP 515 - State Share Health Insurance	0.00	1,224	0	0	2,430	0.00	1,224	0	0	2,430
DP 525 - Fixed Costs	0.00	0	0	0	4,852	0.00	0	0	0	4,855
DP 527 - Inflation and Deflation	0.00	0	0	0	(182)	0.00	0	0	0	(156)
DP 550 - Motor Pool Rate Adjustments	0.00	0	0	0	(6)	0.00	0	0	0	(6)
Grand Total All Present Law Adjustments	0.00	\$2,998	\$0	\$0	\$29,024	0.00	\$2,614	\$0	\$0	\$28,293

*"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 2015 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 food or electricity. 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.

Program Budget Comparison

The following table summarizes the total proposed 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 %
Total Costs	\$372,479	\$385,848	\$407,036	\$405,404	\$758,327	\$812,440	\$54,113	7.14 %
General Fund	252,483	260,101	272,684	271,647	512,584	544,331	31,747	6.19 %
State/Other Special Rev.	103,639	104,057	109,172	108,597	207,696	217,769	10,073	4.85 %
Funds	16,357	21,690	25,180	25,160	38,047	50,340	12,293	32.31 %
Proprietary Funds								
Total Funds	\$372,479	\$385,848	\$407,036	\$405,404	\$758,327	\$812,440	\$54,113	7.14 %

Page Reference

Legislative Budget Analysis, E-153

Funding

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 executive budget reduces the reliance on proprietary funds, shifting cost increases to the state general fund and the accommodations tax.

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								
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 %
Total Budget	\$272,684	\$271,647	\$544,331		\$407,036	\$405,404	\$812,440	

Present Law Adjustments -

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

Present Law Adjustments										
-----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
Grand Total All Present Law Adjustments	(0.90)	\$12,583	\$5,115	\$0	\$21,188	(0.90)	\$11,546	\$4,540	\$0	\$19,556

***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 2015 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 food or electricity. 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.

Program Budget Comparison

The following table summarizes the total proposed 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	8.75	8.75	8.75	8.75	8.75	8.75	0.00	0.00 %
Personal Services	503,091	514,960	534,635	534,506	1,018,051	1,069,141	51,090	5.02 %
Operating Expenses	111,643	123,399	151,813	152,345	235,042	304,158	69,116	29.41 %
Grants	82,098	87,120	87,120	87,120	169,218	174,240	5,022	2.97 %
Total Costs	\$696,832	\$725,479	\$773,568	\$773,971	\$1,422,311	\$1,547,539	\$125,228	8.80 %
General Fund	38,871	38,352	40,638	40,546	77,223	81,184	3,961	5.13 %
Federal Spec. Rev. Funds	647,883	676,997	687,870	688,362	1,324,880	1,376,232	51,352	3.88 %
Proprietary Funds	10,078	10,130	45,060	45,063	20,208	90,123	69,915	345.98 %
Total Funds	\$696,832	\$725,479	\$773,568	\$773,971	\$1,422,311	\$1,547,539	\$125,228	8.80 %

Page Reference

Legislative Budget Analysis, E-156

Funding

The program is funded through a combination of general fund, federal special revenue from the National Park Service (NPS), and proprietary funds. Proprietary funds are generated from fees for historical preservation assistance and services and are used to enhance and maintain the agency's antiquities data base. The federal grants from the NPS have a 60:40 federal/state matching requirement. MHS uses funding at the local level to match the federal grant.

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. 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	38,352	38,352	76,704	94.48 %	725,479	725,479	1,450,958	93.76 %
PL Adjustments	2,286	2,194	4,480	5.52 %	13,089	13,492	26,581	1.72 %
New Proposals	0	0	0	0.00 %	35,000	35,000	70,000	4.52 %
Total Budget	\$40,638	\$40,546	\$81,184		\$773,568	\$773,971	\$1,547,539	

Present Law Adjustments -

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

Present Law Adjustments										
-----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	1,800	0	13,501	15,301	0.00	1,708	0	13,464	15,172
DP 515 - State Share Health Insurance	0.00	486	0	3,888	4,374	0.00	486	0	3,888	4,374
DP 525 - Fixed Costs	0.00	0	0	(1,622)	(1,692)	0.00	0	0	(1,573)	(1,640)
DP 527 - Inflation and Deflation	0.00	0	0	(4,758)	(4,758)	0.00	0	0	(4,276)	(4,276)
DP 550 - Motor Pool Rate Adjustments	0.00	0	0	(136)	(136)	0.00	0	0	(138)	(138)
Grand Total All Present Law Adjustments	0.00	\$2,286	\$0	\$10,873	\$13,089	0.00	\$2,194	\$0	\$11,365	\$13,492

*"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 2015 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 food or electricity. 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.

New Proposals -

The "New Proposals" table shows the changes from the legislative appropriation for FY 15 to the proposed budget.

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 600006 - Operating Expenditures in SHPO Proprietary Fund											
	0.00	0	0	0	35,000		0.00	0	0	0	35,000
Total	0.00	\$0	\$0	\$0	\$35,000		0.00	\$0	\$0	\$0	\$35,000

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

DP 600006 - Operating Expenditures in SHPO Proprietary Fund -

The legislature approved proprietary authority for increasing costs of maintaining the state antiquities database system and to facilitate the development of a statewide Geographic Information System (GIS) and offset costs related to administration, planning, survey, inventory, review, and compliance of duties of the National Register Program. Amounts are not shown on the new proposal table due to the HB 2 proprietary fund request.