

Agency Budget Comparison

The following table compares 2014 actuals expenditures without one-time appropriations plus 2015 estimated appropriations including one-time appropriations, but excluding certain base appropriations to the 2017 biennial total legislative budget. The comparison is listed by year, type of expenditure, and source of funding. The biennial percent change column has been eliminated to allow for the transition to a comparison of biennial appropriations consistent with SB 140 in the future. The biennial appropriation growth/decline is listed in the agency highlight tables and the expenditure section of Volume 1 of this Fiscal Report.

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

Agency Description

The Montana Historical Society (MHS), is an agency of state government that exists for the use, learning, culture, and enjoyment of the citizens of, and visitors to, the State of Montana. MHS acquires, preserves, and protects historical records, art, archives, museum objects, historical places, sites, and monuments. MHS maintains a library and historical museum, providing educational programs and services for teachers and the general public and, publishing the state historical magazine and books. MHS administers the preservation and antiquities acts, supporting commissions with state historical orientation and provides technical assistance to all Montana museums, historical societies, preservation programs, and owners of historic resources.

Agency Highlights

| Montana Historical Society Major Budget Highlights |
|--|
| <ul style="list-style-type: none"> • The 2017 biennium legislative appropriation increased ongoing funding by 6.7% over the 2015 biennium legislative appropriation. This increase was largely due to: <ul style="list-style-type: none"> ◦ Two new appropriations; one of which adds 1.00 permanent FTE for a Digital Project Coordinator in the Research Program ◦ SITSD, rent, grounds maintenance, and other fixed costs increased a cumulative amount of almost \$200,000 over the biennium for the Historical Society • The legislative budget established authority for proprietary funds at a level about 11.2% above the FY 2015 base level • A 2% vacancy savings was applied by the legislature for the 2017 biennium |

Summary of Legislative Action

The legislature approved an overall biennial budget increase of 6.7% for the Montana Historical Society. About 61% of HB 2 funds for the Historical Society come from the general fund, but the agency also receives:

- 2.6% share of the Lodging Facilities Use Tax (bed tax)
- Self-generated revenue from donations, publications, merchandise, membership fees, and museum entrance fees
- Federal historic preservation grants

General fund increased 7.7% in the 2017 biennium due primarily to:

- Approval of 1.00 permanent FTE for a Digital Project Coordinator in the Research Program
- SITSD, Rent, and Grounds increased significantly for the Historical Society

Funding

The following table shows agency funding by source of authority. 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:

- 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 four statutory appropriations that support specific areas:

- 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
- There is a state special revenue account, per HB 487 of the 2015 Legislature, for:
 - The Montana historical society membership account
 - The Montana original Governor's mansion account

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 | |

Other Legislation

HB 4 - In accordance with Title 17, Chapter 7, part 4, Budget Amendments are processed during the interim primarily for the receipt of unanticipated federal funds. Statute requires that Budget Amendments that continue beyond September 30 following each biennium must be approved by the legislature (in HB 4). This includes all of the remaining fiscal year 2015 federal budget amendment authority for the humanities Montana project is authorized to continue into state fiscal year 2016 in the Publications program; all the remaining fiscal year 2015 federal budget amendment authority for the project titled "The Richest Hills: Mining in the Far West 1862-1920" is authorized to continue into state fiscal year 2016 in the Education program; and all remaining fiscal year 2016 federal budget amendment authority for identifying Montana's African-American heritage places is authorized to continue into federal fiscal year 2016 and all of the remaining fiscal year 2015 federal budget amendment authority for data sharing with the Bureau of Land Management is authorized to continue into federal fiscal year 2017 in the Historic Preservation program.

HB 403 - The legislature approved funding for capital maintenance and improvements for the Daly Mansion located near Missoula, MT. This is in the form of a biennial appropriation of \$100,000 over the 2017 biennium. Any unobligated funds remaining on July 1, 2017, must revert to the long-range building program (LRBP) fund.

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. General fund decreased by \$177,682 and state special revenue funds increased \$53,008 when compared to the executive's initial proposed budget. The legislature applied a 2% vacancy savings to the agency.