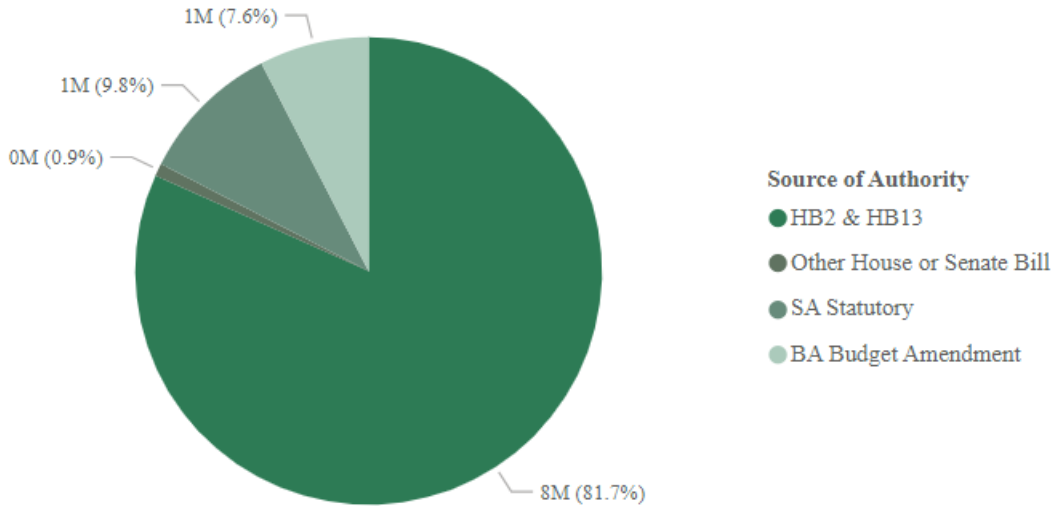


MONTANA HISTORICAL SOCIETY

TOTAL APPROPRIATION AUTHORITY

The total appropriation authority for the Montana Historical Society (MTHS) is shown in the pie chart below. HB 2 and HB 13 provide 81.7% of the total authority for this agency. All types of appropriation authority for this agency are described below, including total budget and the percent expended by source of authority.

Total Modified Budget by Source of Authority



Source of Authority	Modified Budget	Expended Budget	% Expended
HB2 & HB13	8,257,681	2,356,202	28.5%
BA Budget Amendment	767,376	91,560	11.9%
Other House or Senate Bill	88,200	0	0.0%
SA Statutory	994,537	226,889	22.8%
Total	10,107,794	2,674,652	26.5%

Statutory Appropriations

Statutory appropriations in the Montana Historical Society total approximately \$995,000 in FY 2024, which amounts to 9.8% of the total appropriation authority. Statutory appropriation authority includes the following state special revenue funds:

- Sites and signs state special revenue fund: \$809,000, which is 19.3% expended
- Montana Historical Society membership state special revenue fund: \$108,000, which is 63.4% expended
- Lewis and Clark license plates state special revenue fund: \$63,000, which is 0.0% expended
- Original Governor’s Mansion state special revenue fund: \$3,000, which is 2.6% expended

Budget Amendments

The MTHS has approximately \$767,000 in federal budget amendment authority in FY 2024. Significant budget amendments include:

- A grant from the National Endowment for the Humanities of approximately \$350,000 for upgrades to the heating, ventilation, and air conditioning (HVAC) system in order to improve the overall efficiency for preserving collections in the current MTHS and to offset the cost of the HVAC system for the Heritage Center project. This grant is 0.0% expended as of November 30, 2023
- A grant from the National Endowment for the Humanities for the digitization of Montana newspapers. \$141,000 of federal funds are authorized for this program, of which \$54,000 is expended
- \$107,000 of federal funds for the continuation of state historic preservation services and grants to cities and counties throughout Montana
- \$94,000 of federal grant funds for the installation of compact storage units, treatment of historic windows, improvements to the heating ventilating, and air conditioning system, and related fundraising costs for the Montana Heritage Center. These funds are \$22,000, or 23.0%, expended as of November 30, 2023

Other Bills

The Montana Historical Society has approximately \$88,000 of appropriation authority in other bills in FY 2024. There was \$58,000 general fund authority granted from HB 377 to establish the Montana 250th Commission, which will coordinate efforts to celebrate the United States Semiquincentennial. An additional \$30,000 state special revenue authority was granted by HB 9's cultural and aesthetic grant funds for the care and conservation of the capitol complex artwork. As of the end of November, this authority is 0.0% expended.

HB 2 BUDGET MODIFICATIONS

The following chart shows the HB 2 budget as passed by the legislature, including the pay plan, and the HB 2 modified budget from July 1, 2023, through November 30, 2023. Net modifications to the budget include operating plan changes from one expenditure account to another, program transfers, reorganizations, and agency transfers of authority. The **positive modifications** and **negative modifications** are shown by program, expenditure account, and fund type.

Legislative Budget Compared to Modified Budget - HB 2 Only

Agency Name	HB 2 Budget	Modified Budget	Net Modifications
▣ Historical Society	8,257,681	8,257,681	0
Total	8,257,681	8,257,681	0

Expenditure Type	HB 2 Budget	Modified Budget	Net Modifications
▣ 61000 Personal Services	5,084,085	5,084,085	
▣ 62000 Operating Expenses	2,802,552	2,667,729	-134,823
▣ 63000 Equipment & Intangible Assets	96,010	96,010	
▣ 66000 Grants	87,120	87,120	
▣ 69000 Debt Service	187,914	322,737	134,823
Total	8,257,681	8,257,681	0

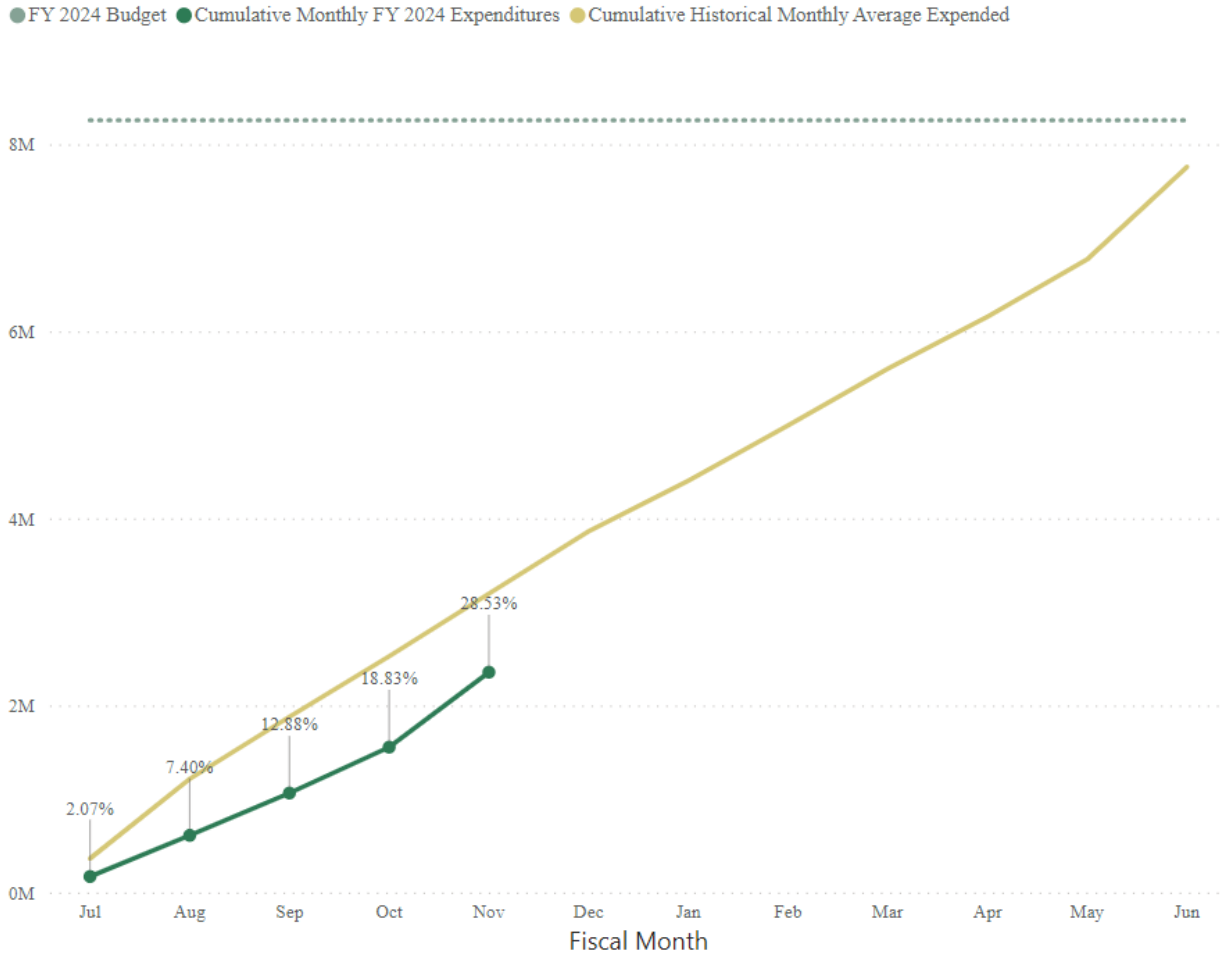
Fund Type	HB 2 Budget	Modified Budget	Net Modifications
▣ 01 General	4,442,675	4,442,675	0
▣ 02 State/Other Spec Rev	1,914,920	1,914,920	
▣ 03 Fed/Other Spec Rev	982,946	982,946	
▣ 06 Enterprise	917,140	917,140	
Total	8,257,681	8,257,681	0

The Montana Historical Society had one HB 2 budget modification between July 1, 2023, and November 30, 2023. This was to transfer operating expense authority to debt services to provide for “temporary rent/lease” of off-site location of MTHS staff to comply with governmental accounting standards.

HB 2 APPROPRIATION AUTHORITY

The following chart shows the appropriated budget for the agency compared to expenditures through November 30, 2023.

Monthly Expenditures Compared to Historical Average



Fund Type	Modified Budget	Expended Budget	% Expended
⊕ 01 General	4,442,675	1,514,765	34.1%
⊕ 02 State/Other Spec Rev	1,914,920	465,556	24.3%
⊕ 03 Fed/Other Spec Rev	982,946	157,783	16.1%
⊕ 06 Enterprise	917,140	218,098	23.8%
Total	8,257,681	2,356,202	28.5%

Expenditure Type	Modified Budget	Expended Budget	% Expended
⊕ Personal Services	5,084,085	1,367,572	26.9%
⊕ Operating Expenses	2,667,729	762,114	28.6%
⊕ Equipment & Intangible Assets	96,010	38,297	39.9%
⊕ Grants	87,120	3,000	3.4%
⊕ Debt Service	322,737	185,219	57.4%
Total	8,257,681	2,356,202	28.5%

Program Name	Modified Budget	Expended Budget	% Expended
⊕ 01 ADMINISTRATION PROGRAM	2,615,903	723,424	27.7%
⊕ 02 RESEARCH CENTER	1,838,326	475,746	25.9%
⊕ 03 MUSEUM PROGRAM	1,431,922	547,105	38.2%
⊕ 04 PUBLICATIONS PROGRAM	623,309	216,352	34.7%
⊕ 05 EDUCATION	635,824	240,302	37.8%
⊕ 06 HISTORIC PRESERVATION PROGRAM	1,112,397	153,272	13.8%
Total	8,257,681	2,356,202	28.5%

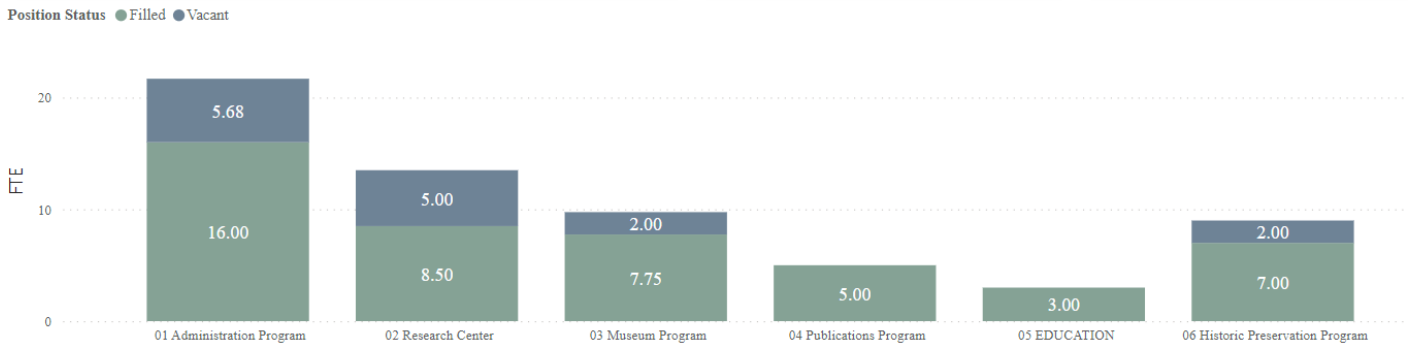
The Montana Historical Society expended 28.5% of its \$8.3 million HB 2 modified budget through November 30, 2023. Expenditures have been lower than the five-year Olympic average of 38.7% (the Olympic average is the average of the percent expended for the most recently completed seven years with the exclusion of the highest and lowest numbers during this period).

Spending percentage differences in FY 2024 are mostly due to a larger budget. Though there was less spending on operating expenses and grants than is typical, increased spending on personal services and debt services brings overall spending in FY 2024 close to \$150,000 more than what was typical in previous years. The low amount of spending in grants is due to grant timing. MTHS plants to expend the full amount of grants budgeted. Budget increases of personal services and operating expenses of approximately \$1.3 million and \$771,000, respectively, in FY 2024 also mean that smaller portions of those budgets are expended if spending is typical.

According to the agency, costs in the Historic Preservation Program are lower than budgeted due to issues with payroll journals not posting in SABHRS as the agency works to process Budget Change Documents (BCDs). Due to administrative staff shortages, the agency was unable to process budget correcting BCDs for the Historic Preservation Program that will allow payroll journals to post. The agency has since hired a fiscal officer and is working to process these BCDs, after which MTHS costs in the program will be closer to expected for the calendar year. All BCDs will be processed by calendar year end.

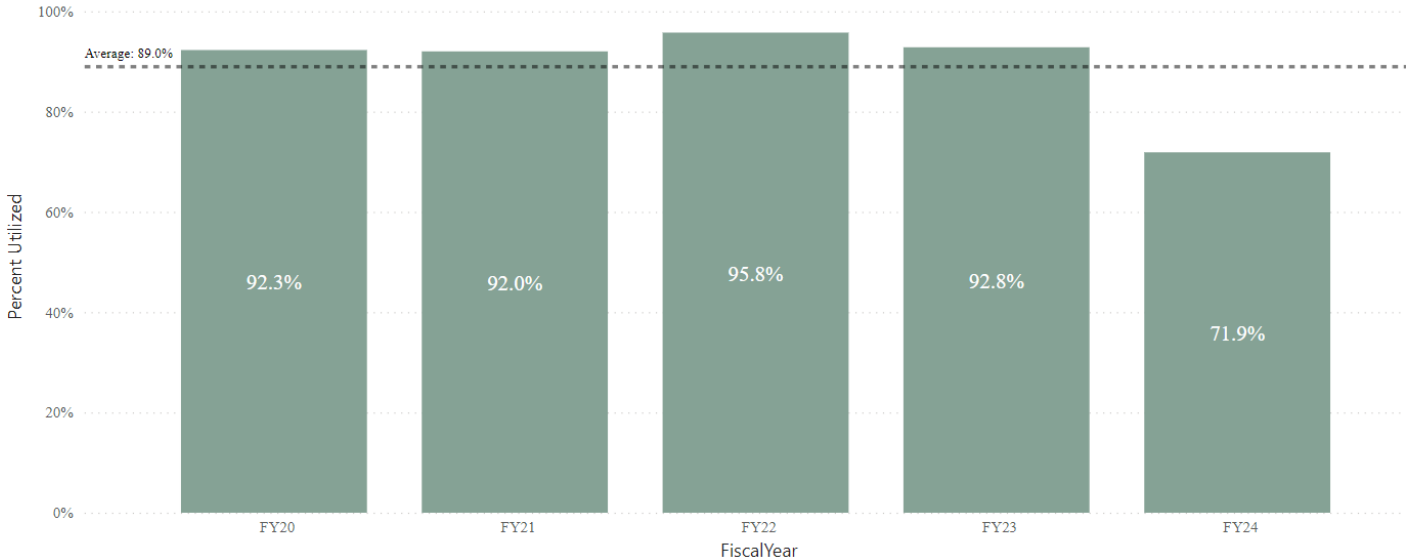
Personal Services

Appropriations for personal services in the Montana Historical Society total \$5.1 million and are 26.9% expended through November 30, 2023. The department has 61.93 HB 2 FTE, excluding aggregate and elected official positions, and 76.3% of these positions were filled as of November 1, 2023. These figures include new positions added for FY 2024, many of which the agency is not able to fill as they were directed to delay hiring until later in the biennium. The following chart shows the filled and vacant FTE within the agency as of November 1, 2023.



Due to reorganization and the construction of the new Heritage Center building, many positions were directed to be hired later in the fiscal year. The department has also recently experienced some turnover, and is expecting to replace several recently vacated positions. The MTHS is in the process of recruiting for 5 positions at the moment, and is expecting to fill an additional 15 positions later in the fiscal year. Postings for new positions and to fill current vacancies will be made at various times between December of 2023 and April of 2024. According to the agency, as of December 5, 2023, 11.14 are new FTE for FY 2023.

The chart below shows the hourly utilization percentage for the MTHS between July 1 and November 1 for each fiscal year. Overall, the department has utilized 71.9% of the hours budgeted for FY 2024, as shown in the chart below. The lower utilization percentage in the agency is due to the new positions being created in the state database that have not been authorized to hire for yet and some recent turnover within the agency.



The chart below shows the vacant FTE by job type. 14.68 FTE were vacant as of November 1, 2023, although many new positions that show as vacant have been directed not to be filled until later in the fiscal year.

Vacant Positions Report

▲	FTE	Median Months Vacant	Market Midpoint (Hourly)
☐ 51170 HISTORICAL SOCIETY	14.68	4.03	26.89
☐ 01 Administration Program	5.68	4.03	18.51
Human Resources Specialist 2	1.00	4.03	42.24
IT Systems Support 2	1.00	4.03	31.02
Sales Associate 2	1.00	9.54	14.82
Security Guard 1	2.68	4.03	18.51
☐ 02 Research Center	5.00	10.92	26.89
Archivist 2	2.00	22.36	26.89
Librarian 1	2.00	5.93	26.33
Librarian Supervisor	1.00	7.70	33.19
☐ 03 Museum Program	2.00	4.03	27.35
Historian 2	2.00	4.03	27.35
☐ 06 Historic Preservation Program	2.00	2.56	25.93
Grants Contracts Coordinator 1	1.00	3.74	24.51
Historian 2	1.00	1.38	27.35
Total	14.68	4.03	26.89

The MTHS generally hires contractors to do copy-editing for magazines and books. No payments to contractors are due to vacant positions in the agency. No overtime has been paid, as all MTHS employees have chosen to receive compensation time instead of overtime pay if extra hours are worked.