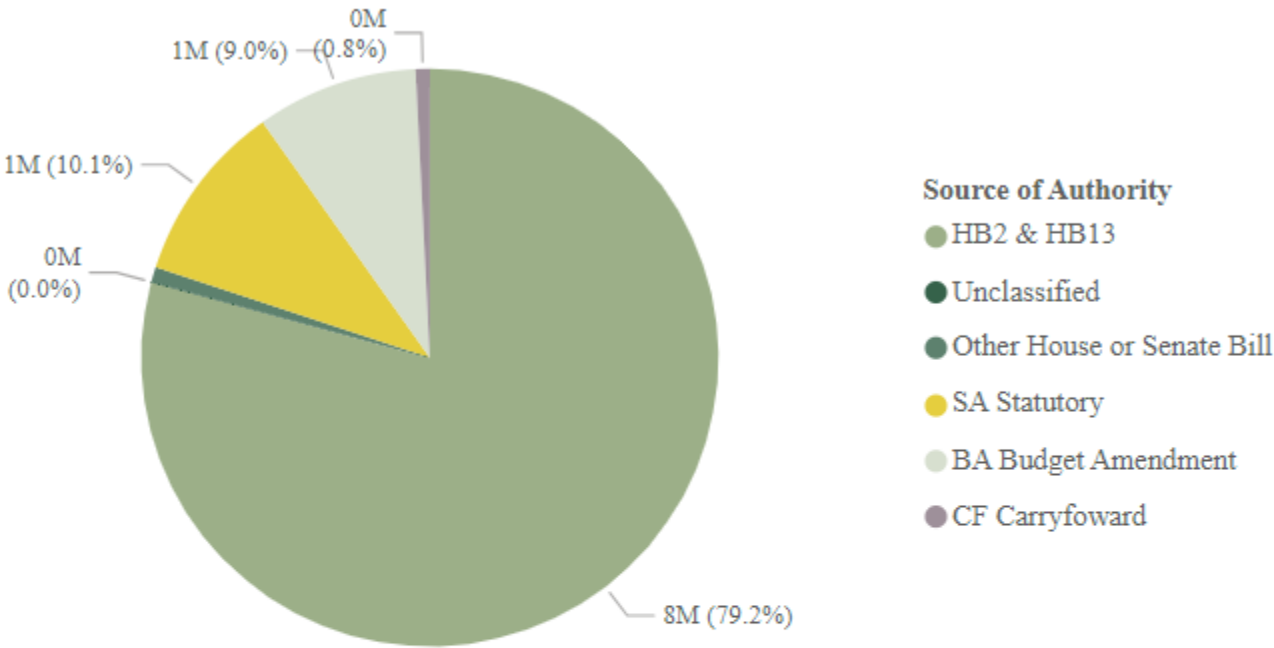


MONTANA HISTORICAL SOCIETY

TOTAL APPROPRIATION AUTHORITY

The total appropriation authority for the Montana Historical Society (MTHS) in Fiscal Year (FY) 2024 is shown in the pie chart below. HB 2 and HB 13 provide 79.2% 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	8,254,218	6,950,871	84.2%
BA Budget Amendment	942,532	294,083	31.2%
CF Carryforward	82,034	64,048	78.1%
Other House or Senate Bill	88,200	33,532	38.0%
SA Statutory	1,052,537	879,434	83.6%
Unclassified	3,463		
Total	10,422,984	8,221,967	78.9%

Statutory Appropriations

Statutory appropriations in the Montana Historical Society total approximately \$1.1 million in FY 2024, which amounts to 10.1% of the total appropriation authority. Statutory appropriation authority includes the following state special revenue funds:

- Sites and signs state special revenue fund: \$820,000, which was 76.0% expended
- Montana Historical Society membership state special revenue fund: \$166,000, which was 85.3% expended
- Lewis and Clark license plates state special revenue fund: \$63,000, which is 1.7% expended
- Original Governor's Mansion state special revenue fund: \$3,000, which is 55.9% expended

Budget Amendments

The MTHS has approximately \$943,000 in 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. \$0 of this grant has been expended as of the end of FY 2024
- A grant from the National Endowment for the Humanities for the digitization of Montana newspapers. This project was completed as of December 2023. \$141,000 of federal funds were authorized for this program, of which \$52,000 have been expended
- \$107,000 of federal funds for the continuation of state historic preservation services and grants to cities and counties throughout Montana, of which \$41,000, or 38.8% has been expended as of the end of FY 2024
- \$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. Of these funds, \$54,000, or 57.2%, have been expended as of the end of FY 2024
- \$100,000 of additional authority for the Education Program was added in November 2023 to cover expenditures related to the 50th Annual Montana History Conference. This amendment appropriated \$100,000 for FY 2024, and \$100,000 for FY 2025. Additional enterprise funds were necessary for a larger conference than is typical. Approximately \$51,000, or 51.2% of these appropriations have been expended as of the end of FY 2024
- \$25,000 of additional authority was added in June 2024 to cover fees for record searches of the State Antiquities Database and electronic copies of these records if so requested. Approximately \$23,000, or 93.7% of these appropriations have been expended as of the end of FY 2024

Other Bills

The Montana Historical Society had approximately \$88,000 of federal 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 FY 2024, approximately \$34,000, or 38.0%, of this authority has been expended.

Unclassified

Per 39-71-403(1)(b)(iv), MCA, when workers' compensation premiums are lower than the previous year, state agencies shall reduce personal service appropriations by the amount of the premium reduction. To track the changes in appropriation authority, total appropriations are not reduced, instead the Governor's Office of Budget and Program Planning (OBPP) requires state agencies to:

- Reduce HB 2, statutory, and proprietary appropriations
- Create a separate offsetting entry on the financial statements in the same amount using an identifying number for workers' compensation entries (shown in the Total Appropriation Authority figure above as "Unclassified")

The offsetting entries are identified as "frozen" appropriations, which means the appropriations will not be spent unless authorized by OBPP. Total MTHS personal service budget has been reduced by \$3,463 and has an offsetting unclassified appropriation of a like amount.

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 June 1 through June 30, 2024. 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	8,254,218	8,254,218	0
01 ADMINISTRATION PROGRAM	2,674,149	2,674,149	0
02 RESEARCH CENTER	1,838,326	1,737,826	-100,500
03 MUSEUM PROGRAM	1,431,922	1,461,922	30,000
04 PUBLICATIONS PROGRAM	623,309	648,809	25,500
05 EDUCATION	635,824	680,824	45,000
06 HISTORIC PRESERVATION PROGRAM	1,050,688	1,050,688	0
Total	8,254,218	8,254,218	0

Expenditure Type	HB 2 Budget	Modified Budget	Net Modifications
61000 Personal Services	5,170,622	5,100,622	-70,000
62000 Operating Expenses	2,578,853	2,585,568	6,715
63000 Equipment & Intangible Assets	94,886	144,886	50,000
66000 Grants	87,120	87,120	0
68000 Transfers-out		10,000	10,000
69000 Debt Service	322,737	326,022	3,285
Total	8,254,218	8,254,218	0

Fund Type	HB 2 Budget	Modified Budget	Net Modifications
01 General	4,440,172	4,440,172	0
02 State/Other Spec Rev	1,914,642	1,914,642	0
03 Fed/Other Spec Rev	982,345	982,345	0
06 Enterprise	917,059	917,059	0
Total	8,254,218	8,254,218	0

The Montana Historical Society had several HB 2 Budget modifications between June 1 and June 30.

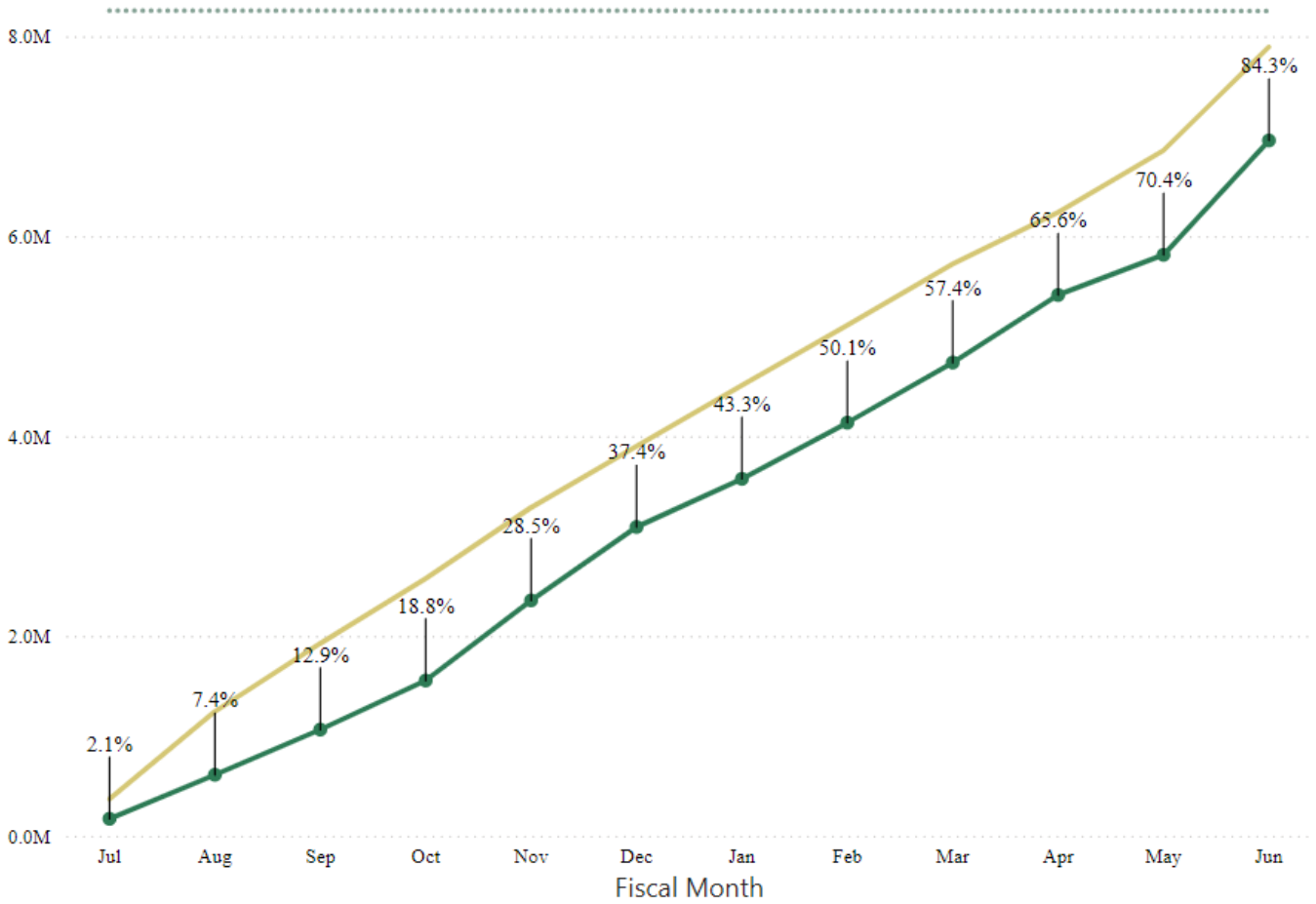
- \$50,000 of operating expenses authority in the accommodation tax fund was moved to equipment & intangible assets authority to cover a payment for the Buswell Photo Collection
- \$45,000 of authority was moved in the accommodation tax fund from personal services to operating expenses in order to cover invoices for tribal liaison services
- \$25,000 was moved from personal services authority to operating expenses authority. Since the Museum Store had to relocate offsite during Heritage Center construction, the Museum budget had to cover rent for that space. This resulted in higher operating expenses, and personal services authority was utilized to cover some of the difference
- \$10,000 was moved from operating authority to transfer authority so it could be transferred to the Department of Commerce for the Carahsoft grant system
- Approximately \$3,000 operating expenses authority was moved to debt service authority to cover a lease shortfall during the temporary relocation due to the construction of the new Heritage Center

HB 2 APPROPRIATION AUTHORITY

The following chart shows the appropriated budget for the agency compared to expenditures as of June 30, 2024, as well as typical historic expenditure rates from previous years.

Monthly Expenditures Compared to Historical Average

● FY 2024 Budget ● Cumulative Monthly FY 2024 Expenditures ● Cumulative Historical Monthly Average Expended



Program Name	Modified Budget	Expended Budget	% Expended
⊕ 01 ADMINISTRATION PROGRAM	2,674,149	2,013,703	75.3%
⊕ 02 RESEARCH CENTER	1,737,826	1,484,575	85.4%
⊕ 03 MUSEUM PROGRAM	1,461,922	1,325,335	90.7%
⊕ 04 PUBLICATIONS PROGRAM	648,809	601,760	92.7%
⊕ 05 EDUCATION	680,824	577,533	84.8%
⊕ 06 HISTORIC PRESERVATION PROGRAM	1,050,688	947,965	90.2%
Total	8,254,218	6,950,871	84.2%

Expenditure Type	Modified Budget	Expended Budget	% Expended
⊕ Personal Services	5,100,622	4,253,133	83.4%
⊕ Operating Expenses	2,585,568	2,172,804	84.0%
⊕ Equipment & Intangible Assets	144,886	115,348	79.6%
⊕ Grants	87,120	86,978	99.8%
⊕ Transfers-out	10,000	10,000	100.0%
⊕ Debt Service	326,022	312,608	95.9%
Total	8,254,218	6,950,871	84.2%

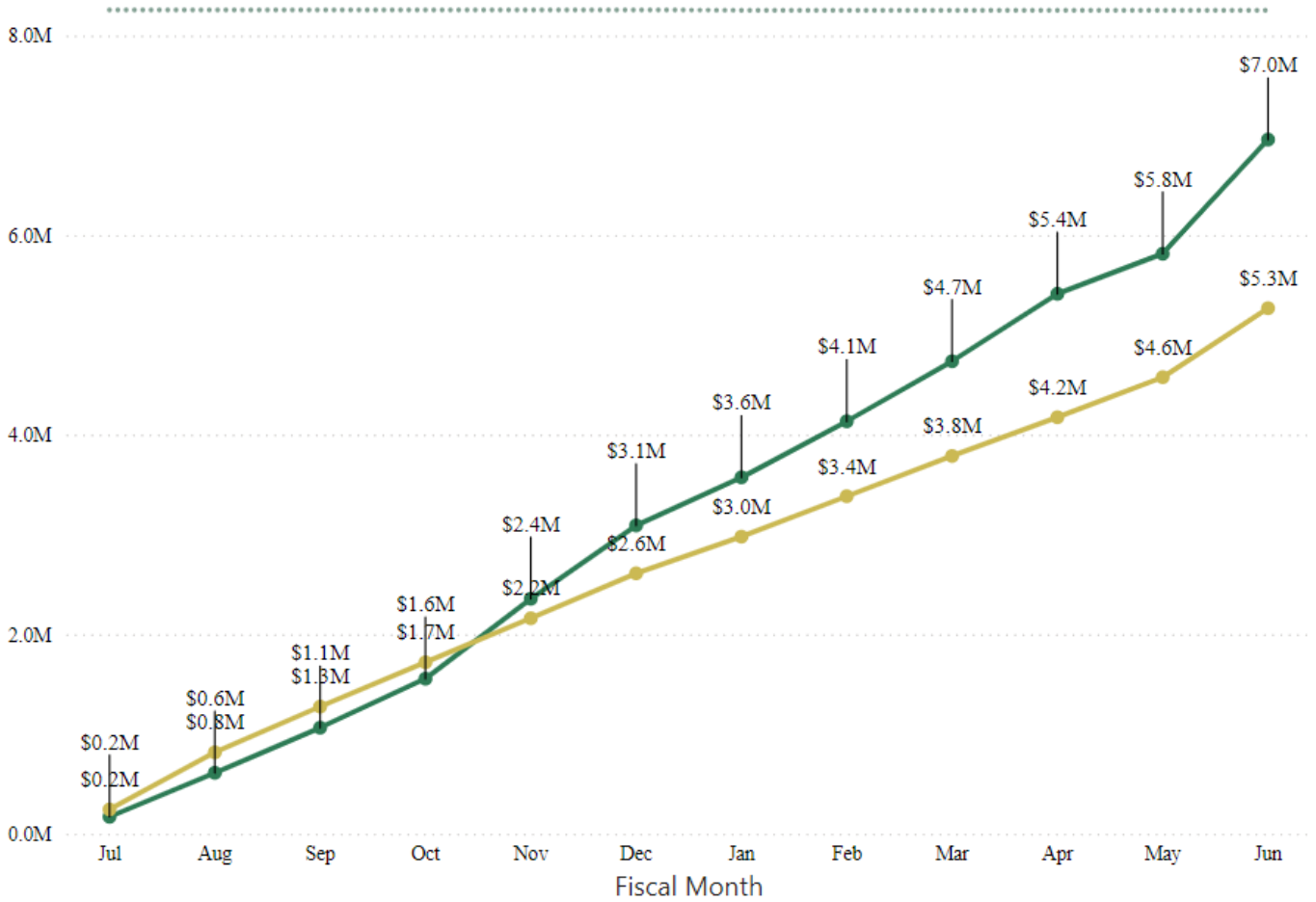
Fund Type	Modified Budget	Expended Budget	% Expended
⊕ 01 General	4,440,172	4,014,119	90.4%
⊕ 02 State/Other Spec Rev	1,914,642	1,299,370	67.9%
⊕ 03 Fed/Other Spec Rev	982,345	879,410	89.5%
⊕ 06 Enterprise	917,059	757,972	82.7%
Total	8,254,218	6,950,871	84.2%

The Montana Historical Society expended 84.2% of its \$8.3 million HB 2 modified budget in FY 2024. Expenditures have been lower than the five-year Olympic average expenditure rate of 95.7% (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).

The smaller percentage expended in FY 2024 is due to the Historical Society having a larger HB 2 budget. The Montana Historical Society had approximately \$2.2 million more HB 2 authority in FY 2024 than it had in FY 2023. Actual spending from the Montana Historical Society is about \$1.7 million higher than what was typical in previous fiscal years. Personal services budget authority is where much of the gap between budgeted funds and expenditures occurred. This was mainly due to many of the new positions that had been approved not being directed to be filled until partway through the fiscal year, as well as some internal turnover and hiring setbacks midway through FY 2024. Many previously vacant positions have since been filled or are intended to be filled for FY 2025. The following chart shows actual spending levels in FY 2024 compared to actual historical five-year Olympic average expenditures, rather than as a percentage of expended budget.

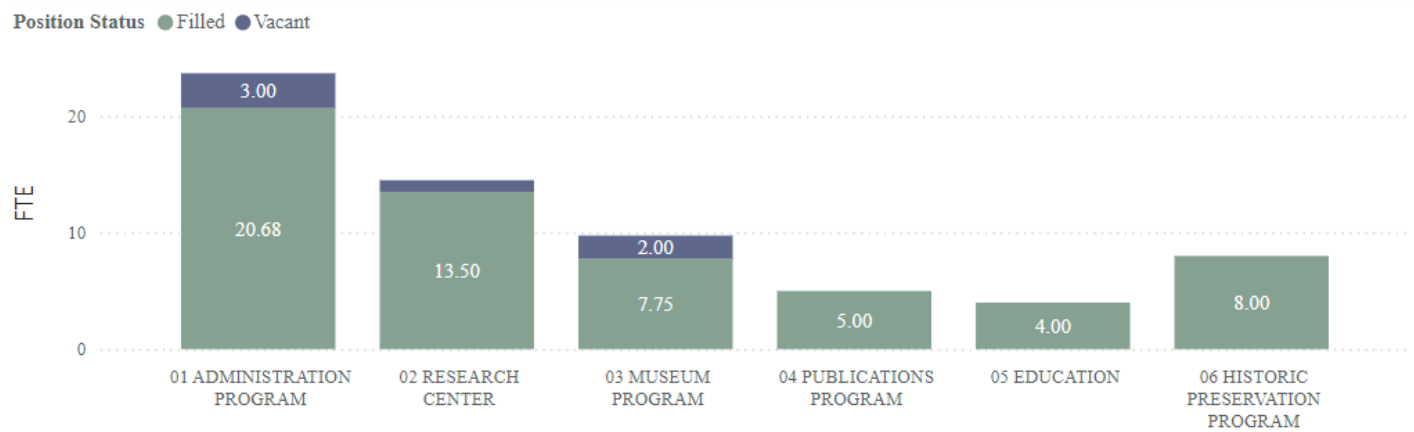
Monthly Expenditures Compared to Historical Average

● FY 2024 Budget ● Cumulative Monthly FY 2024 Expenditures ● Olympic Average (Expenditures)

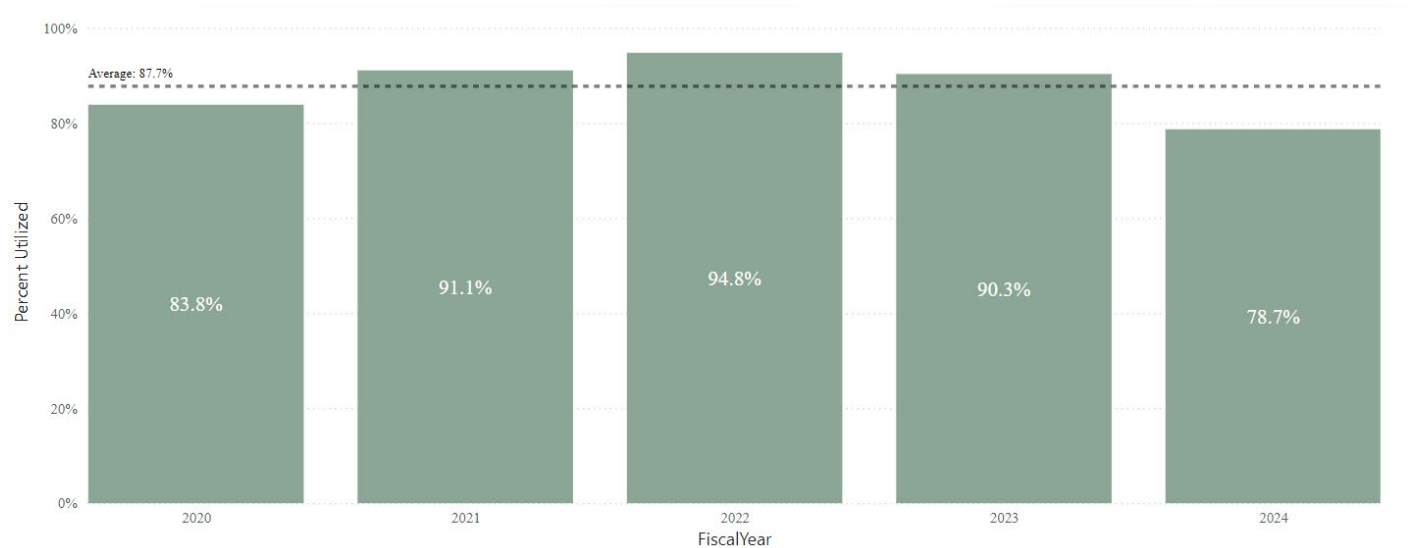


Personal Services

Appropriations for personal services in the Montana Historical Society total \$5.1 million and are 83.4% expended as of the end of FY 2024. The department has 64.93 HB 2 FTE, excluding aggregate and elected official positions, and 90.8% of these positions were filled as of July 1, 2024. This is an increase since May 1, when 76.9% of these positions were filled. 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 July 1, 2024.



The chart below shows the hourly utilization percentage for the MTHS between July 1 and June 30 for each fiscal year. Overall, the department has utilized 78.7% of the hours budgeted for FY 2024. Lower utilization throughout the year is mainly due to the fact that many positions were hired later in the fiscal year. Other factors include the newly created positions which have not yet been hired, and some recent turnover within the agency.



The chart below shows the vacant FTE by job type. As of July 1, 2024, 6.00 FTE were vacant. This is a sizable reduction in vacant FTE compared to the 16.27 vacant FTE reported on May 1, 2024.

	FTE	Median Months Vacant	Market Midpoint (Hourly)
⊖ 51170 HISTORICAL SOCIETY	6.00	12.00	27.35
⊖ 01 ADMINISTRATION PROGRAM	3.00	12.00	30.83
⊖ Accountant 2	1.00	11.70	29.57
⊖ Facilities Specialist 2	1.00	12.00	30.83
⊖ IT Systems Support 2	1.00	12.00	31.02
⊖ 02 RESEARCH CENTER	1.00	8.92	26.33
⊖ Librarian 1	1.00	8.92	26.33
⊖ 03 MUSEUM PROGRAM	2.00	12.00	27.35
⊖ Historian 2	2.00	12.00	27.35
Total	6.00	12.00	27.35