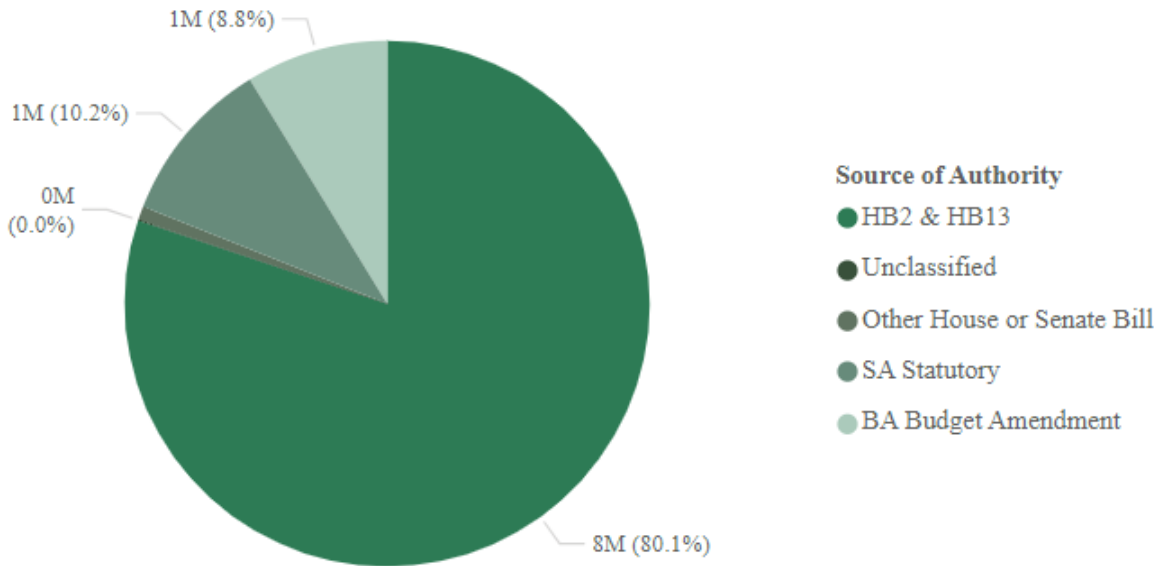


# MONTANA HISTORICAL SOCIETY

## 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 80.1% 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	5,809,375	70.4%
BA Budget Amendment	902,376	199,843	22.1%
Other House or Senate Bill	88,200	24,962	28.3%
SA Statutory	1,052,537	727,732	69.1%
Unclassified	3,463	-	-
<b>Total</b>	<b>10,300,794</b>	<b>6,761,911</b>	<b>65.6%</b>

## Statutory Appropriations

Statutory appropriations in the Montana Historical Society total approximately \$1.1 million in FY 2024, which amounts to 10.2% 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 is 72.3% expended. The Historical Society has plans in place to spend all funding before June 30, 2024
- Montana Historical Society membership state special revenue fund: \$166,000, which is 79.1% expended. The appropriation authority from this fund increased by \$58,000 when a budget change document was processed in March
- Lewis and Clark license plates state special revenue fund: \$63,000, which is 1.9% expended
- Original Governor's Mansion state special revenue fund: \$3,000, which is 58.8% expended

## **Budget Amendments**

The MTHS has approximately \$902,000 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 May 31, 2024
- A grant from the National Endowment for the Humanities for the digitization of Montana newspapers. This project has been completed as of December 2023. \$141,000 of federal funds are 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 \$0 has been expended as of May 31, 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, \$48,000, or 51.4%, have been expended as of May 31, 2024
- \$100,000 of additional authority for the Education Program was added in November 2023 to cover expenditures related to the 50<sup>th</sup> 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 May 31, 2024

## **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 250<sup>th</sup> 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 May, approximately \$25,000, or 28.3%, of federal grant 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 March 1 through May 31, 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
⊖ <b>Historical Society</b>	<b>8,254,218</b>	<b>8,254,218</b>	<b>0</b>
⊕ 01 ADMINISTRATION PROGRAM	2,674,149	2,674,149	0
⊕ 02 RESEARCH CENTER	1,838,326	1,838,326	0
⊕ 03 MUSEUM PROGRAM	1,431,922	1,431,922	0
⊕ 04 PUBLICATIONS PROGRAM	623,309	623,309	0
⊕ 05 EDUCATION	635,824	635,824	0
⊕ 06 HISTORIC PRESERVATION PROGRAM	1,050,688	1,050,688	0
<b>Total</b>	<b>8,254,218</b>	<b>8,254,218</b>	<b>0</b>

Expenditure Type	HB 2 Budget	Modified Budget	Net Modifications
⊕ 61000 Personal Services	5,170,622	5,170,622	0
⊕ 62000 Operating Expenses	2,577,729	2,578,853	1,124
⊕ 63000 Equipment & Intangible Assets	96,010	94,886	-1,124
⊕ 66000 Grants	87,120	87,120	0
⊕ 69000 Debt Service	322,737	322,737	0
<b>Total</b>	<b>8,254,218</b>	<b>8,254,218</b>	<b>0</b>

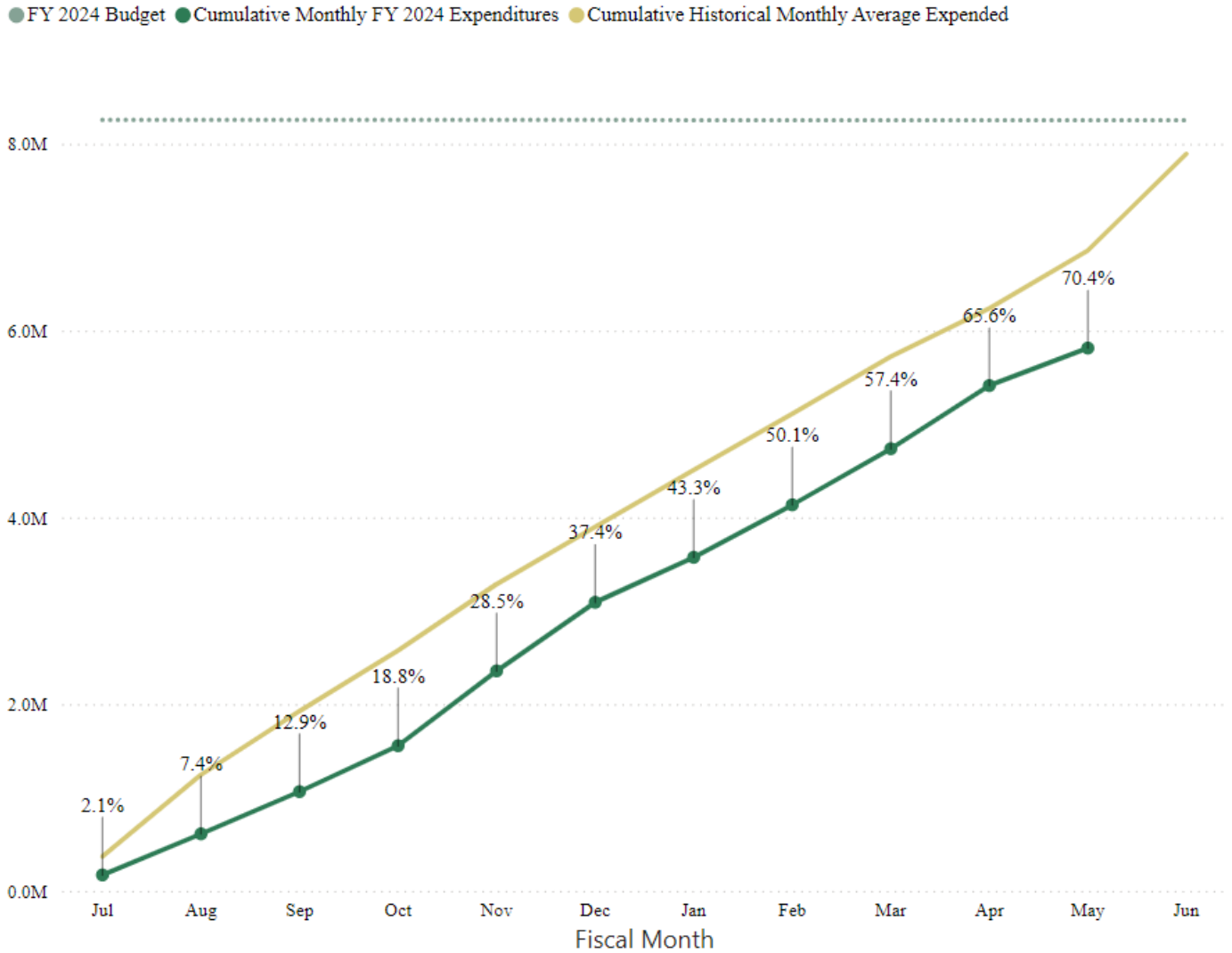
Fund Type	HB 2 Budget	Modified Budget	Net Modifications
⊕ 01 General	4,440,172	4,440,172	0
⊕ 02 State/Other Spec Rev	1,914,642	1,914,642	0
⊕ 03 Fed/Other Spec Rev	982,345	982,345	0
⊕ 06 Enterprise	917,059	917,059	0
<b>Total</b>	<b>8,254,218</b>	<b>8,254,218</b>	<b>0</b>

The Montana Historical Society had one HB 2 budget modification between March 1 and May 31. Approximately \$1,124 was moved from Grants and Intangible Assets to Operating Expenses, as the dollar amounts there were not sufficient to capitalize equipment.

## HB 2 APPROPRIATION AUTHORITY

The following chart shows the appropriated budget for the agency compared to expenditures as of May 31, 2024.

### Monthly Expenditures Compared to Historical Average



Program Name	Modified Budget	Expended Budget	% Expended
⊕ 01 ADMINISTRATION PROGRAM	2,674,149	1,717,471	64.2%
⊕ 02 RESEARCH CENTER	1,838,326	1,230,279	66.9%
⊕ 03 MUSEUM PROGRAM	1,431,922	1,089,446	76.1%
⊕ 04 PUBLICATIONS PROGRAM	623,309	532,820	85.5%
⊕ 05 EDUCATION	635,824	412,278	64.8%
⊕ 06 HISTORIC PRESERVATION PROGRAM	1,050,688	827,080	78.7%
<b>Total</b>	<b>8,254,218</b>	<b>5,809,375</b>	<b>70.4%</b>

Fund Type	Modified Budget	Expended Budget	% Expended
⊕ 01 General	4,440,172	3,374,919	76.0%
⊕ 02 State/Other Spec Rev	1,914,642	1,005,185	52.5%
⊕ 03 Fed/Other Spec Rev	982,345	756,593	77.0%
⊕ 06 Enterprise	917,059	672,677	73.4%
<b>Total</b>	<b>8,254,218</b>	<b>5,809,375</b>	<b>70.4%</b>

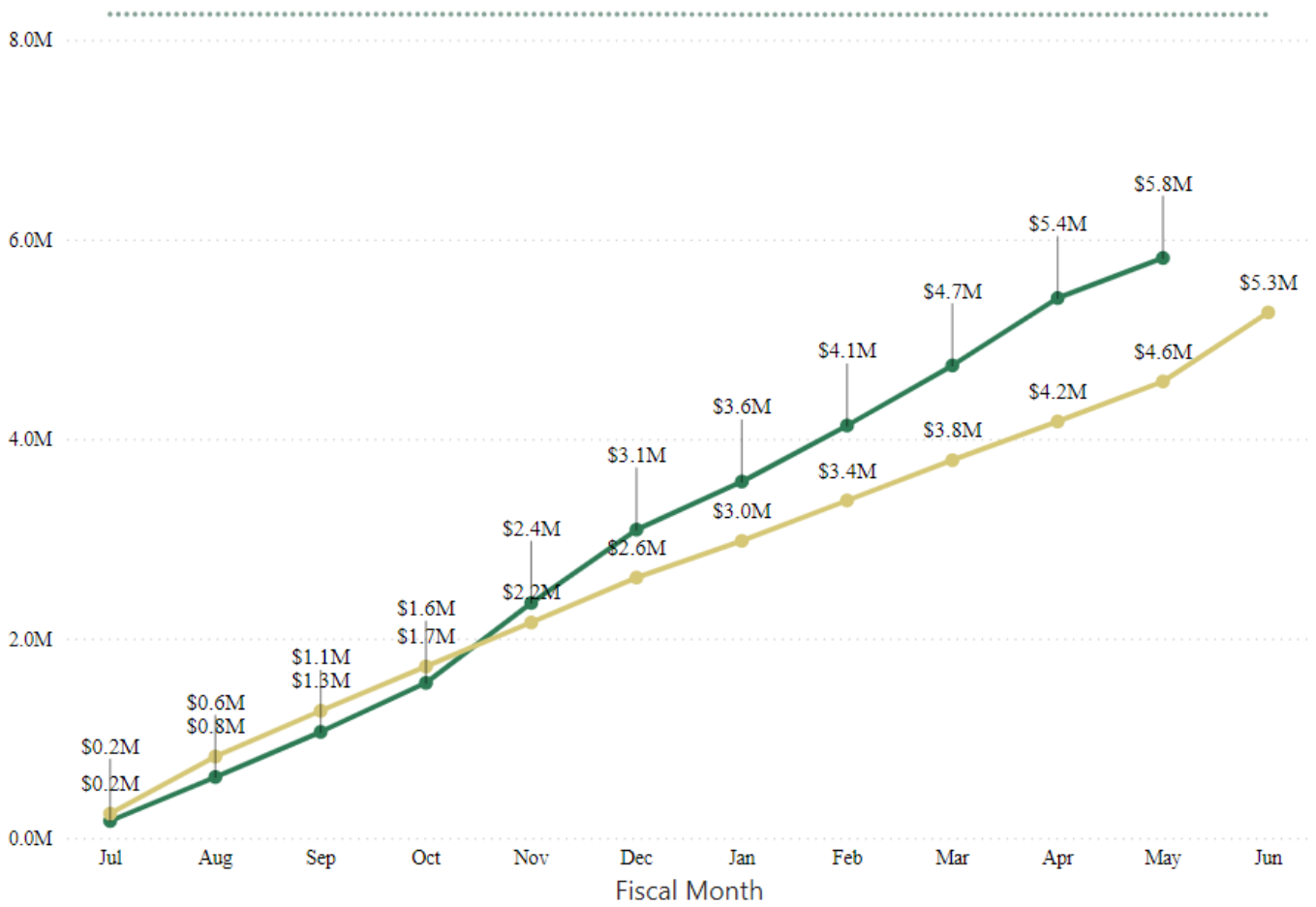
Expenditure Type	Modified Budget	Expended Budget	% Expended
⊕ Personal Services	5,170,622	3,599,833	69.6%
⊕ Operating Expenses	2,578,853	1,769,371	68.6%
⊕ Equipment & Intangible Assets	94,886	65,348	68.9%
⊕ Grants	87,120	69,552	79.8%
⊕ Debt Service	322,737	305,271	94.6%
<b>Total</b>	<b>8,254,218</b>	<b>5,809,375</b>	<b>70.4%</b>

The Montana Historical Society expended 70.4% of its \$8.3 million HB 2 modified budget through May 31, 2024. Expenditures have been lower than the five-year Olympic average of 83.0% (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 budget. Actual spending from the Montana Historical Society is about \$1.2 million higher than what was typical in previous fiscal years. The higher levels of spending are due to more expenditures in Personal Services, Operating Expenses and Debt services than were typical in previous years. The following chart shows actual spending levels in FY 2024 compared to the historical five-year Olympic Average, rather than as a percentage of expended budget.

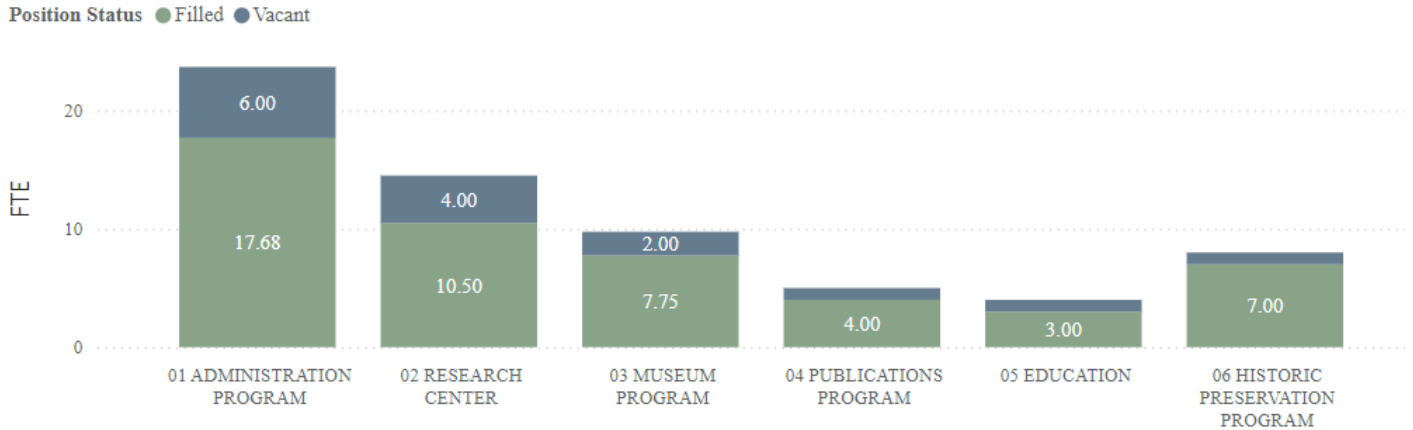
## Monthly Expenditures Compared to Historical Average

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



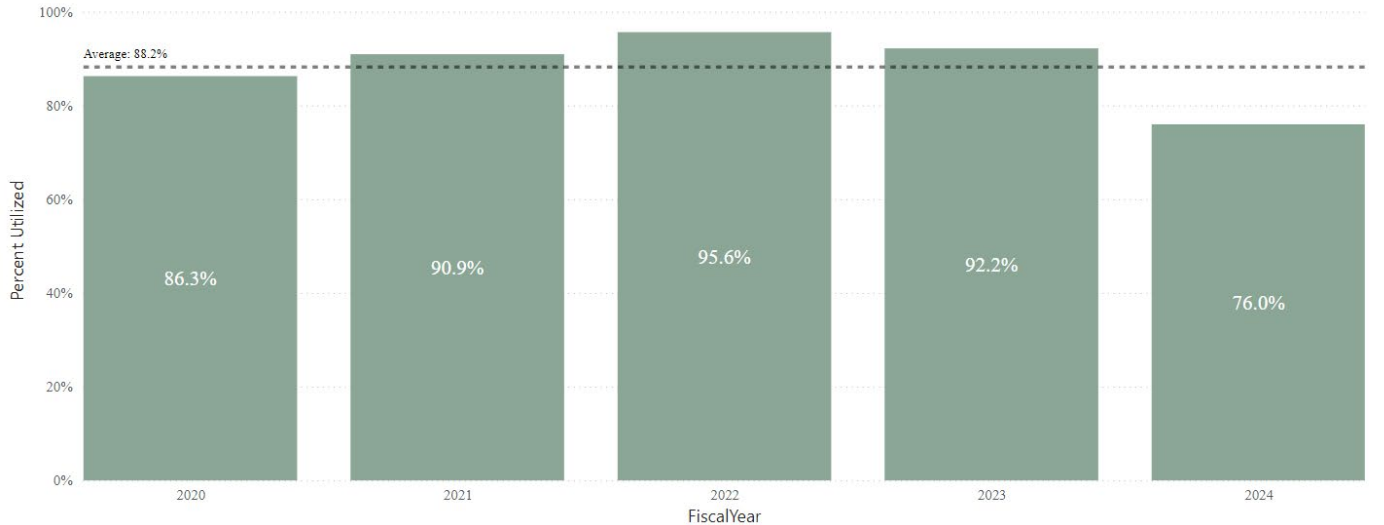
## Personal Services

Appropriations for personal services in the Montana Historical Society total \$5.2 million and are 69.6% expended through May 31, 2024. The department has 64.93 HB 2 FTE, excluding aggregate and elected official positions, and 76.9% of these positions were filled as of May 1, 2024. 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 May 1, 2024.



Due to reorganization and the construction of the new Heritage Center building, many positions were directed to be hired later in the fiscal year. These positions are currently in the hiring process and are discussed more below. The department has also recently experienced some turnover and is expecting to replace several recently vacated positions.

The chart below shows the hourly utilization percentage for the MTHS between July 1 and May 1 for each fiscal year. Overall, the department has utilized 76.0% of the hours budgeted for FY 2024. The lower utilization percentage in the agency is due to 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 May 1, 2024, 16.27 FTE were vacant. In January and February, the Historical Society had a setback with their HR staff resources and experienced delays in getting jobs posted and recruited. They have been working with Department of Administration staff to recruit for currently vacant positions. Several positions have been filled since March, and nine positions are in or nearing the interview portion of the hiring process.

### Vacant Positions Report

	FTE	Median Months Vacant	Market Midpoint (Hourly)
⊖ <b>51170 HISTORICAL SOCIETY</b>	<b>16.27</b>	<b>10.00</b>	<b>27.12</b>
⊖ <b>01 ADMINISTRATION PROGRAM</b>	<b>6.00</b>	<b>10.00</b>	<b>27.67</b>
Facilities Specialist 2	1.00	10.00	30.83
Grants Contracts Coordinator 1	1.00	9.70	24.51
Human Resources Specialist 2	1.00	10.00	42.24
IT Systems Support 2	1.00	10.00	31.02
Security Guard 1	2.00	13.79	18.51
⊖ <b>02 RESEARCH CENTER</b>	<b>4.00</b>	<b>13.44</b>	<b>26.61</b>
Archivist 2	1.00	38.85	26.89
Librarian 1	2.00	11.90	26.33
Project Management Specialist1	1.00	10.00	32.96
⊖ <b>03 MUSEUM PROGRAM</b>	<b>2.00</b>	<b>10.00</b>	<b>27.35</b>
Historian 2	2.00	10.00	27.35
⊖ <b>04 PUBLICATIONS PROGRAM</b>	<b>1.00</b>	<b>4.03</b>	<b>30.33</b>
Graphic Designer 2	1.00	4.03	30.33
⊖ <b>05 EDUCATION</b>	<b>2.27</b>	<b>10.00</b>	<b>13.91</b>
⊖ <b>06 HISTORIC PRESERVATION PROGRAM</b>	<b>1.00</b>	<b>7.34</b>	<b>27.35</b>
Historian 2	1.00	7.34	27.35
<b>Total</b>	<b>16.27</b>	<b>10.00</b>	<b>27.12</b>