

Agency Budget Comparison

The following table compares the 2023 biennium appropriated budget and the adopted budget for the 2025 biennium by type of expenditure and source of funding.

Agency Budget Comparison				
Budget Item	Appropriated Budget 22-23	Legislative Budget 24-25	Biennium Change	Biennium % Change
Personal Services	7,456,471	10,386,117	2,929,646	39.29 %
Operating Expenses	3,647,066	5,761,634	2,114,568	57.98 %
Equipment & Intangible Assets	224,821	192,020	(32,801)	(14.59)%
Grants	174,240	174,240	0	0.00 %
Debt Service	356,674	375,828	19,154	5.37 %
Total Expenditures	\$11,859,272	\$16,889,839	\$5,030,567	42.42 %
General Fund	6,955,289	7,742,903	787,614	11.32 %
State/Other Special Rev. Funds	1,903,860	5,335,859	3,431,999	180.27 %
Federal Spec. Rev. Funds	1,817,506	1,910,773	93,267	5.13 %
Proprietary Funds	1,182,617	1,900,304	717,687	60.69 %
Total Funds	\$11,859,272	\$16,889,839	\$5,030,567	42.42 %
Total Ongoing	\$11,859,272	\$16,574,481	\$4,715,209	39.76 %
Total OTO	\$0	\$315,358	\$315,358	100.00 %

Agency Description

The Montana Historical Society (MTHS) 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. MTHS acquires, preserves, and protects historical records, art, archives, museum objects, historical places, sites, and monuments. MTHS maintains a library and historical museum, provides educational programs and services for teachers and the general public and publishes the state historical magazine and books. MTHS administers the preservation and antiquities acts, supports 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**

The legislature adopted a biennial budget for the Montana Historical Society which is 42.4% or \$5.0 million greater than the previous biennium. The increase is due in large part to the operation and staffing of the new Heritage Center (SB 338, 2019). Most of this increase will be funded by state special revenues from accommodations taxes. Approved changes include the following:

- Statewide present law increases totaling \$2.5 million for the biennium the majority of the increase is for SWPL 2, fixed costs, due to additional rent for the expanded space. This is offset by the one-time-only insurance payment holiday, a reduction to inflation in the amount of \$77,440, and a 1.0% increase in vacancy savings which totals \$116,110
- A fund switch of \$823,930 of authority for operating and maintenance (O&M) from general fund to state special revenue funds from accommodation taxes
- A one-time-only appropriation on \$48,000 for archiving legislative records
- Additional moving and rent costs for an interim location for employees displaced by construction totaling \$242,358 general fund
- The legislature adopted language to void the biennial restricted audit appropriation contingent on passage and approval of HB 132
- 24.46 additional FTE, a total FTE increase of 45.0%, totaling \$3.1 million for the biennium to staff the new Montana Heritage Center. The legislature approved a phase in of these FTE with 12.64 added in the first year and 11.82 more added in FY 25. These FTE are distributed as follows:
 - Administration program: 15.00 FTE of which 8.00 FTE are approved for first year - \$1.4 million state special revenue for the biennium
 - Research center: 3.00 FTE of which 1.00 is approved for the first year - \$295,208 state special revenue
 - Museum Program: 4.00 FTE of which 2.00 are approved for the first year - \$442,697 state special revenue
 - Education program: 2.46 FTE of which 1.64 are approved for the first year - \$206,679 state special revenue

Agency Actuals and Budget Comparison

The following table compares FY 2022 actual expenditures, FY 2022 and FY 2023 appropriations, and the adopted budget for FY 2024 and FY 2025 by type of expenditure and source of funding.

Agency Actuals and Budget Comparison					
Budget Item	Actuals Fiscal 2022	Approp. Fiscal 2022	Approp. Fiscal 2023	Legislative Fiscal 2024	Legislative Fiscal 2025
FTE	0.00	54.38	54.38	67.02	78.84
Personal Services	3,674,186	3,682,783	3,773,688	4,853,279	5,532,838
Operating Expenses	1,717,472	1,795,751	1,851,315	2,802,242	2,959,392
Equipment & Intangible Assets	128,524	128,811	96,010	96,010	96,010
Grants	87,000	87,120	87,120	87,120	87,120
Debt Service	168,757	168,760	187,914	187,914	187,914
Total Expenditures	\$5,775,939	\$5,863,225	\$5,996,047	\$8,026,565	\$8,863,274
General Fund	3,371,867	3,417,538	3,537,751	4,251,192	3,491,711
State/Other Special Rev. Funds	943,273	951,897	951,963	1,914,908	3,420,951
Federal Spec. Rev. Funds	892,054	903,737	913,769	952,882	957,891
Proprietary Funds	568,745	590,053	592,564	907,583	992,721
Total Funds	\$5,775,939	\$5,863,225	\$5,996,047	\$8,026,565	\$8,863,274
Total Ongoing	\$5,775,939	\$5,863,225	\$5,996,047	\$7,818,742	\$8,755,739
Total OTO	\$0	\$0	\$0	\$207,823	\$107,535

Summary of Legislative Action

The legislature approved several changes for the 2025 biennium. The agency will receive a total of 24.46 FTE for operation of the new Montana Heritage Center which will be opening in 2025. Roughly half of the new FTE were approved for FY 2024, with the remaining FTE authorized to be hired in FY 2025. These FTE are spread across 4 programs, see the highlights table for a summary. All new FTE and increased operating costs for the Heritage Center will be funded with accommodations tax. The legislature also approved a fund switch in order to implement the change to accommodation tax distribution that will begin January of 2025, following the completion of the heritage center. All new FTE and operations and maintenance of the center will be funded with state special revenue from accommodations taxes. An appropriation for an off-campus location was approved by the legislature to house employees while they are displaced during construction of the Heritage Center and the remodel of the Veterans and Pioneers memorial building.

Funding

The following table shows adopted agency funding for all sources of authority.

Total Montana Historical Society Funding by Source of Authority 2025 Biennium Budget Request - Montana Historical Society						
Funds	HB2 Ongoing	HB2 OTO	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources	% Total All Funds
General Fund	7,475,545	267,358	0	0	7,742,903	40.91 %
State Special Total	5,287,859	48,000	0	2,037,389	7,373,248	38.96 %
Federal Special Total	1,910,773	0	0	0	1,910,773	10.10 %
Proprietary Total	1,900,304	0	0	0	1,900,304	10.04 %
Other Total	0	0	0	0	0	0.00 %
Total All Funds	\$16,574,481	\$315,358	\$0	\$2,037,389	\$18,927,228	
Percent - Total All Sources	87.57 %	1.67 %	0.00 %	10.76 %		

The agency is funded through a combination of general fund, state special revenue, federal special, and proprietary revenue as shown in the table above. State special revenue funding will increase nearly threefold over the previous biennium in order to fund operating and maintenance (O&M) and new FTE for the Montana Heritage Center (MHC). A total of 6.0% of the lodging tax will be distributed to the MHC for this purpose.

Statutory Appropriations

The Montana Historical Society has several state special revenue funds that are statutorily appropriated. These include:

- Montana Historical Society membership state special revenue fund
- Original Governor’s mansion state special revenue fund
- Sites and signs state special revenue fund
- Lewis and Clark license plates state special revenue fund

The statutory appropriations will be discussed in further detail at the program level.

Budget Summary by Category

The following table summarizes the total budget by base, present law adjustments, and new proposals. For a description of these categories, please see the glossary.

Budget Summary by Category								
Budget Item	-----General Fund-----				-----Total Funds-----			
	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget
2023 Base Budget	3,537,751	3,537,751	7,075,502	91.38 %	5,996,047	5,996,047	11,992,094	71.00 %
SWPL Adjustments	660,903	731,375	1,392,278	17.98 %	1,150,721	1,345,033	2,495,754	14.78 %
PL Adjustments	428	326	754	0.01 %	514	418	932	0.01 %
New Proposals	52,110	(777,741)	(725,631)	(9.37)%	879,283	1,521,776	2,401,059	14.22 %
Total Budget	\$4,251,192	\$3,491,711	\$7,742,903		\$8,026,565	\$8,863,274	\$16,889,839	

Other Legislation

HB 132 - *Modify timing of legislative audits* - makes timing of audits risk based rather than biennial for this agency

HB 377 - *Create a 250th commission for Montana* - establishes the Montana 250th Commission and allocates administrative responsibility of the Commission to MTHS and appropriates \$177,557 to MTHS starting in the 2025 biennium and continuing into the 2027 biennium

HB 855 - *Provide for plaque or tribute commemorating Chuck Johnson* - Directs the MTHS to administer funds, procure, install, and maintain a plaque memorializing Chuck Johnson

HB 920 - *Revise capitol complex laws recognizing US senator Thomas Carter* - Provides a \$100 appropriation. Directs the MTHS to administer funds for a commemorative plaque or bust, with funds raised from private donors

HB 946 - *Implement provision of HB 2 - Section E - Education* - The interim budget committee will direct a study of potential services the Department of Administration may be able to perform for the Historical Society, State Library, and Arts Council to create operating efficiencies

Executive Budget Comparison

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

Executive Budget Comparison								
Budget Item	Approp. Fiscal 2023	Executive Budget Fiscal 2024	Legislative Budget Fiscal 2024	Leg — Exec. Difference Fiscal 2024	Executive Budget Fiscal 2025	Legislative Budget Fiscal 2025	Leg — Exec. Difference Fiscal 2025	Biennium Difference Fiscal 24-25
FTE	54.38	78.84	67.02	(11.82)	78.84	78.84	0.00	0.00
Personal Services	3,773,688	5,603,545	4,853,279	(750,266)	5,591,078	5,532,838	(58,240)	(808,506)
Operating Expenses	1,851,315	2,753,938	2,802,242	48,304	2,863,307	2,959,392	96,085	144,389
Equipment & Intangible Assets	96,010	96,010	96,010	0	96,010	96,010	0	0
Grants	87,120	87,120	87,120	0	87,120	87,120	0	0
Debt Service	187,914	187,914	187,914	0	187,914	187,914	0	0
Total Costs	\$5,996,047	\$8,728,527	\$8,026,565	(\$701,962)	\$8,825,429	\$8,863,274	\$37,845	(\$664,117)
General Fund	3,537,751	4,199,767	4,251,192	51,425	3,446,309	3,491,711	45,402	96,827
State/other Special Rev. Funds	951,963	2,642,911	1,914,908	(728,003)	3,399,328	3,420,951	21,623	(706,380)
Federal Spec. Rev. Funds	913,769	967,860	952,882	(14,978)	974,451	957,891	(16,560)	(31,538)
Other	592,564	917,989	907,583	(10,406)	1,005,341	992,721	(12,620)	(23,026)
Total Funds	\$5,996,047	\$8,728,527	\$8,026,565	(\$701,962)	\$8,825,429	\$8,863,274	\$37,845	(\$664,117)
Total Ongoing	\$5,996,047	\$8,680,527	\$7,818,742	(\$861,785)	\$8,825,429	\$8,755,739	(\$69,690)	(\$931,475)
Total OTO	\$0	\$48,000	\$207,823	\$159,823	\$0	\$107,535	\$107,535	\$267,358

The legislature adopted an ongoing budget that is \$664,117 lower than the executive's request. The difference consists of legislative adjustments reducing inflation, increasing vacancy savings, and reducing the amount of new FTE in the first year of the biennium. The legislature also adopted a one-time-only agency request for additional rent and moving costs for an interim location for employees displaced by construction and renovations.

Language and Statutory Authority

The legislature adopted the following language in HB 2:

"The Administration Program includes a one-time-only reduction in FY 2024 and FY 2025 for a suspension of insurance premium payments to the Risk Management and Tort Defense Division's proprietary fund."

"If HB 132 is passed and approved by the Legislature, Legislative Audit is void."

Program Budget Comparison

The following table compares the 2023 biennium appropriated budget and the adopted budget for the 2025 biennium by type of expenditure and source of funding.

Program Budget Comparison				
Budget Item	Appropriated Budget 22-23	Legislative Budget 24-25	Biennium Change	Biennium % Change
Personal Services	2,134,816	3,796,032	1,661,216	77.82 %
Operating Expenses	875,218	1,742,417	867,199	99.08 %
Total Expenditures	\$3,010,034	\$5,538,449	\$2,528,415	84.00 %
General Fund	2,373,087	3,003,504	630,417	26.57 %
State/Other Special Rev. Funds	3,458	1,653,438	1,649,980	47,714.86 %
Federal Spec. Rev. Funds	219,324	259,109	39,785	18.14 %
Proprietary Funds	414,165	622,398	208,233	50.28 %
Total Funds	\$3,010,034	\$5,538,449	\$2,528,415	84.00 %
Total Ongoing	\$3,010,034	\$5,296,091	\$2,286,057	75.95 %
Total OTO	\$0	\$242,358	\$242,358	100.00 %

Program Description

The Administration Program provides supervision, administration, and coordination of the six programs in the Montana Historical Society. Program staff are responsible for the management, planning, direction, and leadership of the society. Activities include public information, payroll/personnel, fund raising, financial reporting, business management, security, building management, information technology, community outreach and the society store.

Program Highlights

Administration Program Major Budget Highlights
<p>The legislature approved an increase for the 2025 biennium of approximately \$2.5 million or 84.0% over the administration program's 2023 biennium budget. This includes the following adjustments</p> <ul style="list-style-type: none"> • An additional 15.00 FTE for staffing of the expanded Montana Heritage Center. With 8.00 FTE totaling approximately \$500,000 approved for FY 2024 and the remaining 7.00 FTE approved to begin the following fiscal year for a total ongoing increase of approximately \$900,000 annually. These FTE will be funded with state special funds derived from accommodations taxes. Positions include guards, guest services, a human resources specialist, merchandise staff, information technology (IT) staff, a facilities specialist, and an accountant • A fund switch in FY 2025 of \$270,159 general fund to state special revenue for operations and maintenance of the Heritage Center. • A one-time-only increase of approximately \$250,000 for the biennium to cover rent and moving costs for temporary displacement of the agency an off-campus location during renovation and construction activities • A temporary holiday of Risk Management and Tort Defense payments • An additional 1.0% vacancy savings totalling approximately \$44,000 for the biennium • A reduction in audit costs as a result of HB 132 which makes the audit for this agency risk-based rather than biennial

Program Actuals and Budget Comparison

The following table compares FY 2022 actual expenditures, FY 2022 and FY 2023 appropriations, and the adopted budget for FY 2024 and FY 2025 by type of expenditure and source of funding.

Program Actuals and Budget Comparison					
Budget Item	Actuals Fiscal 2022	Approp. Fiscal 2022	Approp. Fiscal 2023	Legislative Fiscal 2024	Legislative Fiscal 2025
FTE	0.00	14.68	14.68	22.68	29.68
Personal Services	1,062,885	1,071,475	1,063,341	1,699,855	2,096,177
Operating Expenses	407,420	454,327	420,891	837,556	904,861
Total Expenditures	\$1,470,305	\$1,525,802	\$1,484,232	\$2,537,411	\$3,001,038
General Fund	1,162,127	1,207,799	1,165,288	1,615,024	1,388,480
State/Other Special Rev. Funds	21	1,729	1,729	498,787	1,154,651
Federal Spec. Rev. Funds	103,168	108,972	110,352	129,188	129,921
Proprietary Funds	204,989	207,302	206,863	294,412	327,986
Total Funds	\$1,470,305	\$1,525,802	\$1,484,232	\$2,537,411	\$3,001,038
Total Ongoing	\$1,470,305	\$1,525,802	\$1,484,232	\$2,402,588	\$2,893,503
Total OTO	\$0	\$0	\$0	\$134,823	\$107,535

Funding

The following table shows proposed agency funding for all sources of authority.

Montana Historical Society, 01-Administration Program Funding by Source of Authority						
Funds	HB2	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources	% Total All Funds	
01100 General Fund	3,003,504	0	0	3,003,504	52.17 %	
02041 MHS Membership	0	0	218,989	218,989	11.70 %	
02188 Senate Art	3,458	0	0	3,458	0.18 %	
02853 Accommodation Tax	1,649,980	0	0	1,649,980	88.12 %	
State Special Total	\$1,653,438	\$0	\$218,989	\$1,872,427	32.52 %	
03021 Historic Sites Preservation	259,109	0	0	259,109	100.00 %	
Federal Special Total	\$259,109	\$0	\$0	\$259,109	4.50 %	
06071 Merchandise - Historical Soc	545,065	0	0	545,065	87.58 %	
06073 Historical Society Management	77,333	0	0	77,333	12.43 %	
Proprietary Total	\$622,398	\$0	\$0	\$622,398	10.81 %	
Total All Funds	\$5,538,449	\$0	\$218,989	\$5,757,438		

HB 2 Appropriations

The Administration Program has been primarily funded in HB 2 with general fund in the past, however due to the new distribution of lodging taxes the program will receive nearly half of its funding from state special revenue by the end of the biennium. The program also receives a small amount of state special revenue from the sale of Lewis and Clark medallions and bronze replicas of the "We Proceeded On" bronze relief located in the Senate chamber. This state special revenue funding is used for the care and maintenance of the original bronze relief.

The program also receives federal funds generated through indirect cost recoveries and proprietary funds from museum entrance fees, lobby rentals, and merchandise sales.

Statutory Appropriations

The Administration Program has one statutorily appropriated state special revenue fund. The Montana Historical Society membership fund receives revenue from the purchase of memberships to the Montana Historical Society. This funding must be used for the improvement, development, and operation of the MTHS.

Budget Summary by Category

The following table summarizes the total budget by base, present law adjustments, and new proposals. For a description of these categories, please see the glossary.

Budget Item	-----General Fund-----				-----Total Funds-----			
	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget
2023 Base Budget	1,165,288	1,165,288	2,330,576	77.60 %	1,484,232	1,484,232	2,968,464	53.60 %
SWPL Adjustments	385,707	408,415	794,122	26.44 %	505,011	564,644	1,069,655	19.31 %
PL Adjustments	394	342	736	0.02 %	528	499	1,027	0.02 %
New Proposals	63,635	(185,565)	(121,930)	(4.06)%	547,640	951,663	1,499,303	27.07 %
Total Budget	\$1,615,024	\$1,388,480	\$3,003,504		\$2,537,411	\$3,001,038	\$5,538,449	

Present Law Adjustments

The "Present Law" Adjustments table shows the changes from the base appropriation to the adopted budget. "Statewide Present Law" adjustments (DP 1, DP 2, DP 3) are standard categories of adjustments made to all agencies. Decisions on these items were applied globally to all agencies.

	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 1 - Personal Services	0.00	157,200	0	18,607	183,757	0.00	164,023	0	19,365	191,738
DP 2 - Fixed Costs	0.00	222,838	0	0	298,578	0.00	237,860	0	0	346,778
DP 3 - Inflation Deflation	0.00	5,669	0	5,669	22,676	0.00	6,532	0	6,532	26,128
DP 20 - SABHRS Rate Adjustment	0.00	394	0	0	528	0.00	342	0	0	499
DP 222 - RMTD Adjustment	0.00	82,110	0	0	110,018	0.00	75,463	0	0	110,018
DP 223 - RMTD Adjustment (OTO)	0.00	(82,110)	0	0	(110,018)	0.00	(75,463)	0	0	(110,018)
Grand Total All Present Law Adjustments	0.00	\$386,101	\$0	\$24,276	\$505,539	0.00	\$408,757	\$0	\$25,897	\$565,143

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

DP 1 - Personal Services -

The legislature adopted adjustments to the present law personal services budget for expected changes, management decisions and budget modifications.

DP 2 - Fixed Costs -

The legislature adopted adjustments to provide the funding required in the proposed budget for fixed costs assessed by other agencies within state government for the services they provide. Examples include: warrant writer, motor pool, information technology services, etc. The rates charged for these services are approved in the section of the budget that provides the services.

DP 3 - Inflation Deflation -

The legislature adopted adjustments to reflect budgetary changes generated from the application of inflation and deflation factors to specific expenditure accounts. Affected accounts include: other services, supplies and materials, communications, in-state motor pool and motor pool leased vehicles, and repair and maintenance.

DP 20 - SABHRS Rate Adjustment -

The legislature adopted an increase to proposed SABHRS rates.

DP 222 - RMTD Adjustment -

The legislature adopted an adjustment to the insurance premiums paid to the Risk Management and Tort Defense Division proprietary fund. This decision package eliminates the reduction included in DP 2. This change is necessary to designate the reduction as one-time-only in the budgeting system.

DP 223 - RMTD Adjustment (OTO) -

The legislature adopted an adjustment to the insurance premiums paid to the Risk Management and Tort Defense Division proprietary fund. This decision package designates the reduction as one-time-only.

New Proposals

The "New Proposals" table shows new changes to spending.

New Proposals	Fiscal 2024					Fiscal 2025				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 99 - New Fixed Costs	0.00	421	0	0	535	0.00	421	0	0	535
DP 333 - Adjustment to Inflation	0.00	(3,403)	0	(3,403)	(13,613)	0.00	(4,276)	0	(4,276)	(17,105)
DP 555 - Additional Vacancy Savings	0.00	(18,944)	0	(2,037)	(21,901)	0.00	(19,086)	0	(2,052)	(22,065)
DP 1401 - HB 132	0.00	(49,262)	0	0	(49,262)	0.00	0	0	0	0
DP 51701 - MT Heritage Center FTE	8.00	0	497,058	0	497,058	15.00	0	882,763	0	882,763
DP 51705 - Fund Switch O&M Costs	0.00	0	0	0	0	0.00	(270,159)	270,159	0	0
DP 51707 - Temporary Location Rent and Moving Costs (Restricted/OTO)	0.00	134,823	0	0	134,823	0.00	107,535	0	0	107,535
Total	8.00	\$63,635	\$497,058	(\$5,440)	\$547,640	15.00	(\$185,565)	\$1,152,922	(\$6,328)	\$951,663

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

DP 99 - New Fixed Costs -

The legislature adopted an appropriation for the agency to provide funding for a new fixed cost for the State Management Training Center. The rates charged for this service are approved in the section of the budget that provides the services.

DP 333 - Adjustment to Inflation -

The legislature adopted an adjustment to inflation included in DP 3.

DP 555 - Additional Vacancy Savings -

The legislature adopted an additional 1.0% vacancy savings.

DP 1401 - HB 132 -

The legislature adopted contingency language to reduce appropriations if HB 132 was passed and approved and this decision package implements this language. HB 132 modifies the timing of legislative audits, providing for a transition from biennial audits, to allowing the auditor to select agencies for auditing based on certain considerations.

DP 51701 - MT Heritage Center FTE -

The legislature adopted an increase of 15.00 FTE to be funded with state special revenue lodging facility use taxes. The positions approved in this program include guards, guest services, human resources specialist, merchandise staff, information technology staff, facilities specialist, and an accountant. An office furniture package and computer package is included as operating costs in FY 2024 for each FTE.

DP 51705 - Fund Switch O&M Costs -

The legislature adopted a reduction to operation and maintenance expenses in the general fund and moved those costs to the state special revenue account for operations and maintenance funded with accommodations taxes in FY 2025.

DP 51707 - Temporary Location Rent and Moving Costs (Restricted/OTO) -

The legislature adopted a one-time-only appropriation to cover rent and moving costs associated with a temporary location during the biennium.

Program Budget Comparison

The following table compares the 2023 biennium appropriated budget and the adopted budget for the 2025 biennium by type of expenditure and source of funding.

Program Budget Comparison				
Budget Item	Appropriated Budget 22-23	Legislative Budget 24-25	Biennium Change	Biennium % Change
Personal Services	1,740,892	2,227,618	486,726	27.96 %
Operating Expenses	914,261	1,281,325	367,064	40.15 %
Equipment & Intangible Assets	218,021	178,430	(39,591)	(18.16)%
Total Expenditures	\$2,873,174	\$3,687,373	\$814,199	28.34 %
General Fund	2,313,049	2,464,015	150,966	6.53 %
State/Other Special Rev. Funds	489,879	1,152,937	663,058	135.35 %
Proprietary Funds	70,246	70,421	175	0.25 %
Total Funds	\$2,873,174	\$3,687,373	\$814,199	28.34 %
Total Ongoing	\$2,873,174	\$3,639,373	\$766,199	26.67 %
Total OTO	\$0	\$48,000	\$48,000	100.00 %

Program Description

The Research Center Program consists of the library, archives, and photograph archives functions. This program acquires, organizes, preserves, makes accessible to the public and assists researchers with published materials, historic records and manuscripts, photographs and related media, digitized materials available online and oral histories illustrative of the history of Montana and the surrounding region. By statute, this program houses the official archives of state government.

Program Highlights

Research Center Major Budget Highlights
<p>The legislature approved an overall biennial increase of 28.3% to the research center program. This request includes:</p> <ul style="list-style-type: none"> • An increase to statewide present law totaling \$398,531 for the biennium, with most of the adjustment going to increased fixed costs for the Heritage Center • A total increase of 3.00 FTE for the biennium with 1.00 FTE approved for a project management specialist in FY 2024 and 2.00 more FTE for archivists in FY 2025. The increase includes \$2,800 of operating expenses for an office furniture/computer package for each position • A fund switch for when the accommodation tax distribution changes on January 1, 2025 for O&M. This will replace \$302,792 of general fund with state special funds • New fixed costs for the State Management Training Center • A one-time-only appropriation of \$48,000 for archiving legislative records • An additional 1.0% vacancy savings, approximately \$12,000 general fund per fiscal year

Program Actuals and Budget Comparison

The following table compares FY 2022 actual expenditures, FY 2022 and FY 2023 appropriations, and the adopted budget for FY 2024 and FY 2025 by type of expenditure and source of funding.

Program Actuals and Budget Comparison					
Budget Item	Actuals Fiscal 2022	Approp. Fiscal 2022	Approp. Fiscal 2023	Legislative Fiscal 2024	Legislative Fiscal 2025
FTE	0.00	13.50	13.50	14.50	16.50
Personal Services	813,971	813,968	926,924	1,077,550	1,150,068
Operating Expenses	432,635	435,543	478,718	621,623	659,702
Equipment & Intangible Assets	128,524	128,806	89,215	89,215	89,215
Total Expenditures	\$1,375,130	\$1,378,317	\$1,494,857	\$1,788,388	\$1,898,985
General Fund	1,098,246	1,098,248	1,214,801	1,362,903	1,101,112
State/Other Special Rev. Funds	244,849	244,945	244,934	390,272	762,665
Proprietary Funds	32,035	35,124	35,122	35,213	35,208
Total Funds	\$1,375,130	\$1,378,317	\$1,494,857	\$1,788,388	\$1,898,985
Total Ongoing	\$1,375,130	\$1,378,317	\$1,494,857	\$1,740,388	\$1,898,985
Total OTO	\$0	\$0	\$0	\$48,000	\$0

Funding

The following table shows proposed agency funding for all sources of authority.

Montana Historical Society, 02-Research Center Funding by Source of Authority						
Funds	HB2	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources	% Total All Funds	
01100 General Fund	2,464,015	0	0	2,464,015	66.82 %	
02131 HIS/LSD MOU	48,000	0	0	48,000	4.16 %	
02853 Accommodation Tax	1,104,937	0	0	1,104,937	95.84 %	
State Special Total	\$1,152,937	\$0	\$0	\$1,152,937	31.27 %	
Federal Special Total	\$0	\$0	\$0	\$0	0.00 %	
06072 MHS Photo Archives Enterprise	33,608	0	0	33,608	47.72 %	
06076 MHS Library Enterprise Funds	36,813	0	0	36,813	52.28 %	
Proprietary Total	\$70,421	\$0	\$0	\$70,421	1.91 %	
Total All Funds	\$3,687,373	\$0	\$0	\$3,687,373		

The Research Center is primarily funded with general fund. The program also receives state special revenue from the lodging tax, as well as funding from two proprietary funds that receive revenue from the sale of historical photo reproductions and images and research requests.

Budget Summary by Category

The following table summarizes the total budget by base, present law adjustments, and new proposals. For a description of these categories, please see the glossary.

Budget Summary by Category								
Budget Item	-----General Fund-----				-----Total Funds-----			
	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget
2023 Base Budget	1,214,801	1,214,801	2,429,602	98.60 %	1,494,857	1,494,857	2,989,714	81.08 %
SWPL Adjustments	164,247	206,467	370,714	15.05 %	176,999	221,532	398,531	10.81 %
PL Adjustments	126	100	226	0.01 %	126	100	226	0.01 %
New Proposals	(16,271)	(320,256)	(336,527)	(13.66)%	116,406	182,496	298,902	8.11 %
Total Budget	\$1,362,903	\$1,101,112	\$2,464,015		\$1,788,388	\$1,898,985	\$3,687,373	

Present Law Adjustments

The "Present Law" Adjustments table shows the changes from the base appropriation to the adopted budget. "Statewide Present Law" adjustments (DP 1, DP 2, DP 3) are standard categories of adjustments made to all agencies. Decisions on these items were applied globally to all agencies.

Present Law Adjustments										
	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 1 - Personal Services	0.00	30,872	0	0	30,872	0.00	35,039	0	0	35,039
DP 2 - Fixed Costs	0.00	121,138	424	0	121,653	0.00	156,860	410	0	157,356
DP 3 - Inflation Deflation	0.00	12,237	12,237	0	24,474	0.00	14,568	14,569	0	29,137
DP 20 - SABHRS Rate Adjustment	0.00	126	0	0	126	0.00	100	0	0	100
Grand Total All Present Law Adjustments	0.00	\$164,373	\$12,661	\$0	\$177,125	0.00	\$206,567	\$14,979	\$0	\$221,632

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

DP 1 - Personal Services -

The legislature adopted adjustments to the present law personal services budget for expected changes, management decisions and budget modifications.

DP 2 - Fixed Costs -

The legislature adopted adjustments to provide the funding required for fixed costs assessed by other agencies within state government for the services they provide. Examples include: warrant writer, motor pool, information technology services, etc. The rates charged for these services are approved in the section of the budget that provides the services.

DP 3 - Inflation Deflation -

The legislature adopted adjustments to reflect budgetary changes generated from the application of inflation and deflation factors to specific expenditure accounts. Affected accounts include: other services, supplies and materials, communications, in-state motor pool and motor pool leased vehicles, and repair and maintenance.

DP 20 - SABHRS Rate Adjustment -

The legislature adopted an increase to proposed SABHRS rates.

New Proposals

The “New Proposals” table shows new changes to spending.

New Proposals	Fiscal 2024					Fiscal 2025				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 99 - New Fixed Costs	0.00	492	0	0	492	0.00	492	0	0	492
DP 333 - Adjustment to Inflation	0.00	(4,720)	(4,720)	0	(9,440)	0.00	(5,850)	(5,851)	0	(11,701)
DP 555 - Additional Vacancy Savings	0.00	(12,043)	0	0	(12,043)	0.00	(12,106)	0	0	(12,106)
DP 51701 - MT Heritage Center FTE	1.00	0	89,397	0	89,397	3.00	0	205,811	0	205,811
DP 51705 - Fund Switch O&M Costs	0.00	0	0	0	0	0.00	(302,792)	302,792	0	0
DP 51706 - Legislative Archive Costs (Restricted/Biennial/OTO)	0.00	0	48,000	0	48,000	0.00	0	0	0	0
Total	1.00	(\$16,271)	\$132,677	\$0	\$116,406	3.00	(\$320,256)	\$502,752	\$0	\$182,496

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

DP 99 - New Fixed Costs -

The legislature adopted an appropriation for the agency to provide funding for a new fixed cost for the State Management Training Center. The rates charged for this service are approved in the section of the budget that provides the services.

DP 333 - Adjustment to Inflation -

The legislature adopted an adjustment to inflation included in DP 3.

DP 555 - Additional Vacancy Savings -

The legislature adopted an additional 1.0% vacancy savings.

DP 51701 - MT Heritage Center FTE -

The legislature adopted an increase of 3.00 FTE to be funded with state special revenue lodging facility use taxes. The positions include a digital projects specialist, an archivist, and a photo/film specialist. This includes an office package and computer package in FY 2024 for each FTE.

DP 51705 - Fund Switch O&M Costs -

The legislature adopted a decision package to reduce operation and maintenance expenses in the general fund and moves those costs to the state special revenue account for operations and maintenance funded with accommodations taxes in FY 2025.

DP 51706 - Legislative Archive Costs (Restricted/Biennial/OTO) -

The legislature adopted a one-time-only, biennial, restricted state special revenue authority of \$48,000 to spend cash available for archiving legislative files.

Program Budget Comparison

The following table compares the 2023 biennium appropriated budget and the adopted budget for the 2025 biennium by type of expenditure and source of funding.

Program Budget Comparison				
Budget Item	Appropriated Budget 22-23	Legislative Budget 24-25	Biennium Change	Biennium % Change
Personal Services	1,060,617	1,556,820	496,203	46.78 %
Operating Expenses	886,203	984,521	98,318	11.09 %
Equipment & Intangible Assets	6,800	13,590	6,790	99.85 %
Debt Service	356,674	375,828	19,154	5.37 %
Total Expenditures	\$2,310,294	\$2,930,759	\$620,465	26.86 %
General Fund	1,134,939	1,048,712	(86,227)	(7.60)%
State/Other Special Rev. Funds	1,169,196	1,875,889	706,693	60.44 %
Proprietary Funds	6,159	6,158	(1)	(0.02)%
Total Funds	\$2,310,294	\$2,930,759	\$620,465	26.86 %
Total Ongoing	\$2,310,294	\$2,905,759	\$595,465	25.77 %
Total OTO	\$0	\$25,000	\$25,000	100.00 %

Program Description

The Museum Program collects, preserves and interprets the history of Montana through its material culture, by collecting fine art and historical, archaeological and ethnological artifacts from Montana and the general geographic region. The program interprets its collections through exhibits, tours and traveling exhibits. The program also coordinates with the Society's education program to orchestrate events, programs, and materials on Montana history for learners of all ages.

Program Highlights

Museum Program Major Budget Highlights
<p>The legislature approved a budget for the 2025 biennium is 26.9% greater than the 2023 biennium. This includes:</p> <ul style="list-style-type: none"> • The DP 1 adjustment in the amount of \$95,356 general fund for the biennium • An additional 4.00 FTE for the operation of the MHC with 2.00 FTE for historians approved to begin in FY 2024 and 2.00 FTE for museum technicians approved to begin in FY 2025. The majority of this request is personal services but does include a small amount of operating costs for office furniture and computer equipment. The total is approximately \$340,000 for the biennium • Statewide present law adjustments total \$184,966 for the biennium and are 90.4% general fund with the balance from state special funds from accommodations tax • The program has additional statutory appropriations totaling \$290,232 that are used for operation of the original Governor's mansion, installation and maintenance of roadside signs and sites, and projects related to Lewis and Clark • A fund switch of approximately \$250,000 in FY 2025 to replace general fund with lodging tax revenue • An additional 1.0% vacancy savings totaling approximately \$18,000 for the biennium • An appropriation of \$25,000 general fund in FY 2024 for moving and temporary storage of military items during building renovation activities

Program Actuals and Budget Comparison

The following table compares FY 2022 actual expenditures, FY 2022 and FY 2023 appropriations, and the adopted budget for FY 2024 and FY 2025 by type of expenditure and source of funding.

Program Actuals and Budget Comparison					
Budget Item	Actuals Fiscal 2022	Approp. Fiscal 2022	Approp. Fiscal 2023	Legislative Fiscal 2024	Legislative Fiscal 2025
FTE	0.00	7.75	7.75	9.75	11.75
Personal Services	536,620	536,618	523,999	698,100	858,720
Operating Expenses	452,060	452,072	434,131	505,525	478,996
Equipment & Intangible Assets	0	5	6,795	6,795	6,795
Debt Service	168,757	168,760	187,914	187,914	187,914
Total Expenditures	\$1,157,437	\$1,157,455	\$1,152,839	\$1,398,334	\$1,532,425
General Fund	569,778	569,776	565,163	661,495	387,217
State/Other Special Rev. Funds	584,581	584,599	584,597	733,760	1,142,129
Proprietary Funds	3,078	3,080	3,079	3,079	3,079
Total Funds	\$1,157,437	\$1,157,455	\$1,152,839	\$1,398,334	\$1,532,425
Total Ongoing	\$1,157,437	\$1,157,455	\$1,152,839	\$1,373,334	\$1,532,425
Total OTO	\$0	\$0	\$0	\$25,000	\$0

Funding

The following table shows proposed agency funding for all sources of authority.

Montana Historical Society, 03-Museum Program Funding by Source of Authority						
Funds	HB2	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources	% Total All Funds	
01100 General Fund	1,048,712	0	0	1,048,712	25.00 %	
02045 Original Governor's Mansion	0	0	5,772	5,772	0.18 %	
02123 Sites & Signs	0	0	1,132,246	1,132,246	36.06 %	
02853 Accommodation Tax	1,875,889	0	0	1,875,889	59.74 %	
02986 Lewis & Clark License Plates	0	0	126,202	126,202	4.02 %	
State Special Total	\$1,875,889	\$0	\$1,264,220	\$3,140,109	74.85 %	
Federal Special Total	\$0	\$0	\$0	\$0	0.00 %	
06077 MHS Museum Enterprise Funds	6,158	0	0	6,158	100.00 %	
Proprietary Total	\$6,158	\$0	\$0	\$6,158	0.15 %	
Total All Funds	\$2,930,759	\$0	\$1,264,220	\$4,194,979		

The Museum Program is primarily funded in HB 2 with general fund and the accommodation tax state special revenue fund. This program also has proprietary funding, which receives revenue from the sale of books, copies, and photographs, as well as the rental of traveling exhibits.

The Museum Program has several state special revenue funds that are statutorily appropriated. These include:

- The Original Governor’s Mansion account, which is established in 22-3-117, MCA. It receives revenues from tours of the mansion and the funding must be used for the improvement, development, and operation of the Original Governor’s Mansion
- The sites and signs account, which is established in 15-65-121(2)(a), MCA. This fund receives 1.0% of the lodging facility use tax for the installation or maintenance of roadside historical signs and historic sites
- The Lewis and Clark license plates account, which is established in 90-1-115, MCA. This fund receives 25.0% of the revenue from the sale of Lewis and Clark bicentennial license plates. Funding must be used to support projects related to Lewis and Clark

Budget Summary by Category

The following table summarizes the total budget by base, present law adjustments, and new proposals. For a description of these categories, please see the glossary.

Budget Item	-----General Fund-----				-----Total Funds-----			
	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget
2023 Base Budget	565,163	565,163	1,130,326	107.78 %	1,152,839	1,152,839	2,305,678	78.67 %
SWPL Adjustments	82,540	84,614	167,154	15.94 %	91,129	93,837	184,966	6.31 %
PL Adjustments	(92)	(116)	(208)	(0.02)%	(95)	(120)	(215)	(0.01)%
New Proposals	13,884	(262,444)	(248,560)	(23.70)%	154,461	285,869	440,330	15.02 %
Total Budget	\$661,495	\$387,217	\$1,048,712		\$1,398,334	\$1,532,425	\$2,930,759	

Present Law Adjustments

The "Present Law" Adjustments table shows the changes from the base appropriation to the adopted budget. "Statewide Present Law" adjustments (DP 1, DP 2, DP 3) are standard categories of adjustments made to all agencies. Decisions on these items were applied globally to all agencies.

	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 1 - Personal Services	0.00	45,874	0	0	45,874	0.00	49,482	0	0	49,482
DP 2 - Fixed Costs	0.00	28,972	895	0	29,867	0.00	26,743	834	0	27,577
DP 3 - Inflation Deflation	0.00	7,694	7,694	0	15,388	0.00	8,389	8,389	0	16,778
DP 20 - SABHRS Rate Adjustment	0.00	(92)	(3)	0	(95)	0.00	(116)	(4)	0	(120)
Grand Total All Present Law Adjustments	0.00	\$82,448	\$8,586	\$0	\$91,034	0.00	\$84,498	\$9,219	\$0	\$93,717

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

DP 1 - Personal Services -

The legislature adopted adjustments to the present law personal services budget for expected changes, management decisions and budget modifications.

DP 2 - Fixed Costs -

The legislature adopted adjustments to provide the funding required for fixed costs assessed by other agencies within state government for the services they provide. Examples include: warrant writer, motor pool, information technology services, etc. The rates charged for these services are approved in the section of the budget that provides the services.

DP 3 - Inflation Deflation -

The legislature adopted adjustments to reflect budgetary changes generated from the application of inflation and deflation factors to specific expenditure accounts. Affected accounts include: other services, supplies and materials, communications, in-state motor pool and motor pool leased vehicles, and repair and maintenance.

DP 20 - SABHRS Rate Adjustment -

The legislature adopted an increase to proposed SABHRS rates.

New Proposals

The "New Proposals" table shows new changes to spending.

	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 99 - New Fixed Costs	0.00	200	82	0	282	0.00	200	82	0	282
DP 333 - Adjustment to Inflation	0.00	(2,324)	(2,324)	0	(4,648)	0.00	(2,626)	(2,626)	0	(5,252)
DP 555 - Additional Vacancy Savings	0.00	(8,992)	0	0	(8,992)	0.00	(9,039)	0	0	(9,039)
DP 51701 - MT Heritage Center FTE	2.00	0	142,819	0	142,819	4.00	0	299,878	0	299,878
DP 51705 - Fund Switch O&M Costs	0.00	0	0	0	0	0.00	(250,979)	250,979	0	0
DP 51708 - Military Equipment Moving and Storage (Restricted/Biennial/	0.00	25,000	0	0	25,000	0.00	0	0	0	0
Total	2.00	\$13,884	\$140,577	\$0	\$154,461	4.00	(\$262,444)	\$548,313	\$0	\$285,869

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

DP 99 - New Fixed Costs -

The legislature adopted an appropriation in each year of the 2025 biennium to provide funding for the agency to pay for new fixed cost allocations related to the State Management Training Center. Rates for the fix costs are reviewed by the Section A subcommittee.

DP 333 - Adjustment to Inflation -

The legislature adopted an adjustment to inflation included in DP 3.

DP 555 - Additional Vacancy Savings -

The legislature adopted an additional 1.0% vacancy savings.

DP 51701 - MT Heritage Center FTE -

The legislature adopted an increase of 4.00 FTE to be funded with state special revenue lodging facility use taxes. The positions include two exhibits specialists and two historians/curators to operate the Heritage Center. This request includes an office package and computer package in FY 2024 for each FTE.

DP 51705 - Fund Switch O&M Costs -

The legislature adopted a decision package to reduce operation and maintenance expenses in the general fund and moves those costs to the state special revenue account for operations and maintenance funded with accommodations taxes in FY 2025.

DP 51708 - Military Equipment Moving and Storage (Restricted/Biennial/ -

To facilitate the moving and temporary storage of military items from their present location in the Veterans and Pioneers Memorial Building during building renovation activities.

Program Budget Comparison

The following table compares the 2023 biennium appropriated budget and the adopted budget for the 2025 biennium by type of expenditure and source of funding.

Program Budget Comparison				
Budget Item	Appropriated Budget 22-23	Legislative Budget 24-25	Biennium Change	Biennium % Change
Personal Services	681,423	706,261	24,838	3.65 %
Operating Expenses	301,016	530,235	229,219	76.15 %
Total Expenditures	\$982,439	\$1,236,496	\$254,057	25.86 %
General Fund	451,172	510,255	59,083	13.10 %
Proprietary Funds	531,267	726,241	194,974	36.70 %
Total Funds	\$982,439	\$1,236,496	\$254,057	25.86 %
Total Ongoing	\$982,439	\$1,236,496	\$254,057	25.86 %
Total OTO	\$0	\$0	\$0	0.00 %

Program Description

The Publications Program promotes the study of Montana history and education through lectures, publications, and curriculum materials. The program publishes quarterly editions of the award-winning *Montana The Magazine of Western History*. It also publishes books under the Montana Historical Society Press imprint.

Program Highlights

Publications Program Major Budget Highlights
<p>The legislature approved an increase to the publications program of 25.9% over the previous biennium. This includes:</p> <ul style="list-style-type: none"> • SWPL adjustments in the amount of \$207,850 <ul style="list-style-type: none"> ◦ Fixed costs make up the majority at \$170,192 of proprietary funds ◦ DP 1 and DP 3 are split between general and proprietary funds. ◦ Total general fund is \$21,745 • A small amount for new fixed costs related to the State Management Training Center • Additional 1.0% vacancy savings totalling approximately \$5,400 general fund and approximately \$2,000 proprietary funds for the biennium

Program Actuals and Budget Comparison

The following table compares FY 2022 actual expenditures, FY 2022 and FY 2023 appropriations, and the adopted budget for FY 2024 and FY 2025 by type of expenditure and source of funding.

Program Actuals and Budget Comparison					
Budget Item	Actuals Fiscal 2022	Approp. Fiscal 2022	Approp. Fiscal 2023	Legislative Fiscal 2024	Legislative Fiscal 2025
FTE	0.00	5.00	5.00	5.00	5.00
Personal Services	339,779	339,781	341,642	352,259	354,002
Operating Expenses	123,063	123,070	177,946	253,572	276,663
Total Expenditures	\$462,842	\$462,851	\$519,588	\$605,831	\$630,665
General Fund	203,455	203,455	247,717	254,525	255,730
Proprietary Funds	259,387	259,396	271,871	351,306	374,935
Total Funds	\$462,842	\$462,851	\$519,588	\$605,831	\$630,665
Total Ongoing	\$462,842	\$462,851	\$519,588	\$605,831	\$630,665
Total OTO	\$0	\$0	\$0	\$0	\$0

Funding

The following table shows proposed agency funding for all sources of authority.

Montana Historical Society, 04-Publications Program Funding by Source of Authority						
Funds	HB2	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources	% Total All Funds	
01100 General Fund	510,255	0	0	510,255	41.27 %	
State Special Total	\$0	\$0	\$0	\$0	0.00 %	
Federal Special Total	\$0	\$0	\$0	\$0	0.00 %	
06002 MHS Publications Enterprise	726,241	0	0	726,241	100.00 %	
Proprietary Total	\$726,241	\$0	\$0	\$726,241	58.73 %	
Total All Funds	\$1,236,496	\$0	\$0	\$1,236,496		

The Publications Program is funded with general fund and proprietary funds. The proprietary fund receives revenues from subscription sales for the magazine and sales of books published by the program.

Budget Summary by Category

The following table summarizes the total budget by base, present law adjustments, and new proposals. For a description of these categories, please see the glossary.

Budget Item	-----General Fund-----				-----Total Funds-----			
	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget
2023 Base Budget	247,717	247,717	495,434	97.10 %	519,588	519,588	1,039,176	84.04 %
SWPL Adjustments	10,182	11,563	21,745	4.26 %	91,338	116,522	207,860	16.81 %
PL Adjustments	0	0	0	0.00 %	(243)	(249)	(492)	(0.04)%
New Proposals	(3,374)	(3,550)	(6,924)	(1.36)%	(4,852)	(5,196)	(10,048)	(0.81)%
Total Budget	\$254,525	\$255,730	\$510,255		\$605,831	\$630,665	\$1,236,496	

Present Law Adjustments

The "Present Law" Adjustments table shows the changes from the base appropriation to the adopted budget. "Statewide Present Law" adjustments (DP 1, DP 2, DP 3) are standard categories of adjustments made to all agencies. Decisions on these items were applied globally to all agencies.

	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 1 - Personal Services	0.00	8,535	0	0	14,325	0.00	9,582	0	0	16,086
DP 2 - Fixed Costs	0.00	0	0	0	73,718	0.00	0	0	0	96,474
DP 3 - Inflation Deflation	0.00	1,647	0	0	3,295	0.00	1,981	0	0	3,962
DP 20 - SABHRS Rate Adjustment	0.00	0	0	0	(243)	0.00	0	0	0	(249)
Grand Total All Present Law Adjustments	0.00	\$10,182	\$0	\$0	\$91,095	0.00	\$11,563	\$0	\$0	\$116,273

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

DP 1 - Personal Services -

The legislature adopted adjustments to the present law personal services budget for expected changes, management decisions and budget modifications.

DP 2 - Fixed Costs -

The legislature adopted adjustments to provide the funding required in the proposed budget for fixed costs assessed by other agencies within state government for the services they provide. Examples include: warrant writer, motor pool, information technology services, etc. The rates charged for these services are approved in the section of the budget that provides the services.

DP 3 - Inflation Deflation -

The legislature adopted adjustments to reflect budgetary changes generated from the application of inflation and deflation factors to specific expenditure accounts. Affected accounts include: other services, supplies and materials, communications, in-state motor pool and motor pool leased vehicles, and repair and maintenance.

DP 20 - SABHRS Rate Adjustment -

The legislature adopted an increase to proposed SABHRS rates.

New Proposals

The "New Proposals" table shows new changes to spending.

	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 99 - New Fixed Costs	0.00	0	0	0	182	0.00	0	0	0	182
DP 333 - Adjustment to Inflation	0.00	(663)	0	0	(1,326)	0.00	(826)	0	0	(1,652)
DP 555 - Additional Vacancy Savings	0.00	(2,711)	0	0	(3,708)	0.00	(2,724)	0	0	(3,726)
Total	0.00	(\$3,374)	\$0	\$0	(\$4,852)	0.00	(\$3,550)	\$0	\$0	(\$5,196)

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

DP 99 - New Fixed Costs -

The legislature adopted an appropriation for the agency to provide funding for a new fixed cost for the State Management Training Center. The rates charged for this service are approved in the section of the budget that provides the services.

DP 333 - Adjustment to Inflation -

The legislature adopted an adjustment to inflation included in DP 3.

DP 555 - Additional Vacancy Savings -

The legislature adopted an additional 1.0% vacancy savings.

Program Budget Comparison

The following table compares the 2023 biennium appropriated budget and the adopted budget for the 2025 biennium by type of expenditure and source of funding.

Program Budget Comparison				
Budget Item	Appropriated Budget 22-23	Legislative Budget 24-25	Biennium Change	Biennium % Change
Personal Services	564,613	797,490	232,877	41.25 %
Operating Expenses	299,830	503,544	203,714	67.94 %
Total Expenditures	\$864,443	\$1,301,034	\$436,591	50.51 %
General Fund	564,613	593,591	28,978	5.13 %
State/Other Special Rev. Funds	241,327	653,595	412,268	170.83 %
Proprietary Funds	58,503	53,848	(4,655)	(7.96)%
Total Funds	\$864,443	\$1,301,034	\$436,591	50.51 %
Total Ongoing	\$864,443	\$1,301,034	\$436,591	50.51 %
Total OTO	\$0	\$0	\$0	0.00 %

Program Description

The Education Program is comprised of three primary activities: outreach and interpretation, historic signs and the volunteer program. The Education Program provides educational public programming of all types, both at the Society’s headquarters and throughout the state, for a wide range of audiences; plans and produces educational publications, curriculum materials and instructional literature for broad distribution; plans and produces interpretive, place-based publications, articles, brochures and tours for statewide distribution/implementation; provides reference services to the general public, teachers, students, technical users and other like-minded institutions and organizations; oversees the National Register Sign Program for the State of Montana, producing interpretive signage for eligible structures and sites in all parts of the state; assists in the planning, production and placement of non-register permanent and/or temporary signage in all parts of the state; and oversees the society’s volunteer program, coordinating volunteers, and volunteer activities society-wide.

Program Highlights

Education Program Major Budget Highlights
<ul style="list-style-type: none"> • The legislatively approved Education program budget is 50.5% greater than the previous biennium. Most of the increase is to state special revenue to operate the MHC • The legislature approved an additional 2.46 FTE for tour guides for the MHC. The FTE will be phased in with 1.64 approved to begin in FY 2024 and an additional 0.82 FTE approved to begin in FY 2025 when the new MHC opens • Statewide present law adjustments total \$245,252 state special funding of the biennium of which approximately \$30,000 is general fund <ul style="list-style-type: none"> ◦ The majority of SWPL adjustments to this and most programs is in fixed costs due to increased square footage

Program Actuals and Budget Comparison

The following table compares FY 2022 actual expenditures, FY 2022 and FY 2023 appropriations, and the adopted budget for FY 2024 and FY 2025 by type of expenditure and source of funding.

Program Actuals and Budget Comparison					
Budget Item	Actuals Fiscal 2022	Approp. Fiscal 2022	Approp. Fiscal 2023	Legislative Fiscal 2024	Legislative Fiscal 2025
FTE	0.00	4.45	4.45	6.09	6.91
Personal Services	279,646	279,646	284,967	376,732	420,758
Operating Expenses	144,089	153,877	145,953	238,252	265,292
Total Expenditures	\$423,735	\$433,523	\$430,920	\$614,984	\$686,050
General Fund	279,646	279,646	284,967	296,027	297,564
State/Other Special Rev. Funds	113,822	120,624	120,703	292,089	361,506
Proprietary Funds	30,267	33,253	25,250	26,868	26,980
Total Funds	\$423,735	\$433,523	\$430,920	\$614,984	\$686,050
Total Ongoing	\$423,735	\$433,523	\$430,920	\$614,984	\$686,050
Total OTO	\$0	\$0	\$0	\$0	\$0

Funding

The following table shows proposed agency funding for all sources of authority.

Montana Historical Society, 05-Education Funding by Source of Authority					
Funds	HB2	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources	% Total All Funds
01100 General Fund	593,591	0	0	593,591	32.00 %
02123 Sites & Signs	0	0	554,180	554,180	45.88 %
02853 Accommodation Tax	653,595	0	0	653,595	54.12 %
State Special Total	\$653,595	\$0	\$554,180	\$1,207,775	65.10 %
Federal Special Total	\$0	\$0	\$0	\$0	0.00 %
06002 MHS Publications Enterprise	1	0	0	1	0.00 %
06022 MHS Education Enterprise Funds	53,847	0	0	53,847	100.00 %
Proprietary Total	\$53,848	\$0	\$0	\$53,848	2.90 %
Total All Funds	\$1,301,034	\$0	\$554,180	\$1,855,214	

HB 2 Appropriations

The Education Program is primarily funded in HB 2 with general fund and the accommodation tax state special revenue fund. This program also has proprietary funding, which receives revenue from:

- The Montana Historical Conference and the revenues are used for expenses associated with the conference
- Special tour revenues are used for operating expenses associated with the tours
- Elementary and middle school textbook sales and revenues are used for expenses related to textbook reproduction and teacher training

Statutory Appropriations

The Education Program has one state special revenue fund that is statutorily appropriated. The sites and signs fund established in 15-65-121(2)(a), MCA, receives 1.0% of the lodging facility use tax for the installation or maintenance of roadside historical signs and historic sites.

Budget Summary by Category

The following table summarizes the total budget by base, present law adjustments, and new proposals. For a description of these categories, please see the glossary.

Budget Item	-----General Fund-----				-----Total Funds-----			
	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget
2023 Base Budget	284,967	284,967	569,934	96.01 %	430,920	430,920	861,840	66.24 %
SWPL Adjustments	16,175	17,870	34,045	5.74 %	108,186	137,066	245,252	18.85 %
PL Adjustments	0	0	0	0.00 %	158	149	307	0.02 %
New Proposals	(5,115)	(5,273)	(10,388)	(1.75)%	75,720	117,915	193,635	14.88 %
Total Budget	\$296,027	\$297,564	\$593,591		\$614,984	\$686,050	\$1,301,034	

Present Law Adjustments

The "Present Law" Adjustments table shows the changes from the base appropriation to the adopted budget. "Statewide Present Law" adjustments (DP 1, DP 2, DP 3) are standard categories of adjustments made to all agencies. Decisions on these items were applied globally to all agencies.

Present Law Adjustments	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 1 - Personal Services	0.00	14,126	0	0	14,126	0.00	15,577	0	0	15,577
DP 2 - Fixed Costs	0.00	0	87,626	0	87,911	0.00	0	114,327	0	114,608
DP 3 - Inflation Deflation	0.00	2,049	2,050	0	6,149	0.00	2,293	2,294	0	6,881
DP 20 - SABHRS Rate Adjustment	0.00	0	157	0	158	0.00	0	149	0	149
Grand Total All Present Law Adjustments	0.00	\$16,175	\$89,833	\$0	\$108,344	0.00	\$17,870	\$116,770	\$0	\$137,215

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

DP 1 - Personal Services -

The legislature adopted adjustments to the present law personal services budget for expected changes, management decisions and budget modifications.

DP 2 - Fixed Costs -

The legislature adopted adjustments to provide the funding required in the proposed budget for fixed costs assessed by other agencies within state government for the services they provide. Examples include: warrant writer, motor pool, information technology services, etc. The rates charged for these services are approved in the section of the budget that provides the services.

DP 3 - Inflation Deflation -

The legislature adopted adjustments to reflect budgetary changes generated from the application of inflation and deflation factors to specific expenditure accounts. Affected accounts include: other services, supplies and materials, communications, in-state motor pool and motor pool leased vehicles, and repair and maintenance.

DP 20 - SABHRS Rate Adjustment -

The legislature adopted an increase to proposed SABHRS rates.

New Proposals

The "New Proposals" table shows new changes to spending.

New Proposals	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 99 - New Fixed Costs	0.00	0	235	0	235	0.00	0	235	0	235
DP 333 - Adjustment to Inflation	0.00	(718)	(718)	0	(2,154)	0.00	(844)	(845)	0	(2,534)
DP 555 - Additional Vacancy Savings	0.00	(4,397)	0	0	(4,397)	0.00	(4,429)	0	0	(4,429)
DP 51701 - MT Heritage Center FTE	1.64	0	82,036	0	82,036	2.46	0	124,643	0	124,643
Total	1.64	(\$5,115)	\$81,553	\$0	\$75,720	2.46	(\$5,273)	\$124,033	\$0	\$117,915

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

DP 99 - New Fixed Costs -

The legislature adopted an appropriation for the agency to provide funding for a new fixed cost for the State Management Training Center. The rates charged for this service are approved in the section of the budget that provides the services.

DP 333 - Adjustment to Inflation -

The legislature adopted an adjustment to inflation included in DP 3.

DP 555 - Additional Vacancy Savings -

The legislature adopted an additional 1.0% vacancy savings.

DP 51701 - MT Heritage Center FTE -

The legislature adopted an increase of 2.46 FTE to be funded with state special revenue lodging facility use taxes. This includes an office furniture package and computer package in FY 2024 for each FTE.

Program Budget Comparison

The following table compares the 2023 biennium appropriated budget and the adopted budget for the 2025 biennium by type of expenditure and source of funding.

Program Budget Comparison				
Budget Item	Appropriated Budget 22-23	Legislative Budget 24-25	Biennium Change	Biennium % Change
Personal Services	1,274,110	1,301,896	27,786	2.18 %
Operating Expenses	370,538	719,592	349,054	94.20 %
Grants	174,240	174,240	0	0.00 %
Total Expenditures	\$1,818,888	\$2,195,728	\$376,840	20.72 %
General Fund	118,429	122,826	4,397	3.71 %
Federal Spec. Rev. Funds	1,598,182	1,651,664	53,482	3.35 %
Proprietary Funds	102,277	421,238	318,961	311.86 %
Total Funds	\$1,818,888	\$2,195,728	\$376,840	20.72 %
Total Ongoing	\$1,818,888	\$2,195,728	\$376,840	20.72 %
Total OTO	\$0	\$0	\$0	0.00 %

Program Description

The Historic Preservation Office administers the Montana Antiquities Act and Montana's participation in the National Historic Preservation Act of 1966, as amended. Staff provide technical assistance to all Montana property owners, including agencies, organizations, and the public. Staff maintain a statewide inventory of recorded historic and archaeological sites. Staff review state agencies compliance with the state antiquities act. Staff review and comment on all proposed federally funded or permitted projects within the state to determine their effect on properties listed or eligible for listing in the National Register of Historic Places. Staff administer the National Register of Historic Places program in Montana through the State Preservation Review Board. The office recommends certification of historic structures and rehabilitation projects for federal tax credits to citizens and businesses, as authorized by the Tax Reform Act of 1976. The program awards and administers pass-through federal grants to local governments participating in the federal Certified Local Government Program. The program may also award funds for historic survey and planning for historic areas and for bricks and mortar rehabilitation when funds are available.

Program Highlights

Historic Preservation Program Major Budget Highlights
<p>The legislature approved a budget for the historic preservation program is 20.7% greater than the previous biennium</p> <ul style="list-style-type: none"> • The program has greatly increased fixed costs in SWPL 2 due to growth in the program, most of the increase is funded with proprietary revenue. • The legislature approved reductions to the inflation increase and additional vacancy savings totaling approximately \$10,000 in each fiscal year of the biennium

Program Actuals and Budget Comparison

The following table compares FY 2022 actual expenditures, FY 2022 and FY 2023 appropriations, and the adopted budget for FY 2024 and FY 2025 by type of expenditure and source of funding.

Program Actuals and Budget Comparison					
Budget Item	Actuals Fiscal 2022	Approp. Fiscal 2022	Approp. Fiscal 2023	Legislative Fiscal 2024	Legislative Fiscal 2025
FTE	0.00	9.00	9.00	9.00	9.00
Personal Services	641,285	641,295	632,815	648,783	653,113
Operating Expenses	158,205	176,862	193,676	345,714	373,878
Grants	87,000	87,120	87,120	87,120	87,120
Total Expenditures	\$886,490	\$905,277	\$913,611	\$1,081,617	\$1,114,111
General Fund	58,615	58,614	59,815	61,218	61,608
Federal Spec. Rev. Funds	788,886	794,765	803,417	823,694	827,970
Proprietary Funds	38,989	51,898	50,379	196,705	224,533
Total Funds	\$886,490	\$905,277	\$913,611	\$1,081,617	\$1,114,111
Total Ongoing	\$886,490	\$905,277	\$913,611	\$1,081,617	\$1,114,111
Total OTO	\$0	\$0	\$0	\$0	\$0

Funding

The following table shows proposed agency funding for all sources of authority.

Montana Historical Society, 06-Historic Preservation Program Funding by Source of Authority						
Funds	HB2	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources	% Total All Funds	
01100 General Fund	122,826	0	0	122,826	5.59 %	
State Special Total	\$0	\$0	\$0	\$0	0.00 %	
03021 Historic Sites Preservation	1,651,664	0	0	1,651,664	100.00 %	
Federal Special Total	\$1,651,664	\$0	\$0	\$1,651,664	75.22 %	
06013 SHPO ENTERPRISE FUND	421,238	0	0	421,238	100.00 %	
Proprietary Total	\$421,238	\$0	\$0	\$421,238	19.18 %	
Total All Funds	\$2,195,728	\$0	\$0	\$2,195,728		

The Historic Preservation Program is primarily funded with federal special revenue. This funding is from the National Parks Service for historic site preservation. The program also receives funding from a proprietary fund and a small portion from the general fund. The proprietary fund receives revenue from fees for historical preservation assistance and services and is used to enhance and maintain the agency's antiquities database.

Budget Summary by Category

The following table summarizes the total budget by base, present law adjustments, and new proposals. For a description of these categories, please see the glossary.

Budget Item	-----General Fund-----				-----Total Funds-----			
	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget	Budget Fiscal 2024	Budget Fiscal 2025	Biennium Fiscal 24-25	Percent of Budget
2023 Base Budget	59,815	59,815	119,630	97.40 %	913,611	913,611	1,827,222	83.22 %
SWPL Adjustments	2,052	2,446	4,498	3.66 %	178,058	211,432	389,490	17.74 %
PL Adjustments	0	0	0	0.00 %	40	39	79	0.00 %
New Proposals	(649)	(653)	(1,302)	(1.06)%	(10,092)	(10,971)	(21,063)	(0.96)%
Total Budget	\$61,218	\$61,608	\$122,826		\$1,081,617	\$1,114,111	\$2,195,728	

Present Law Adjustments

The "Present Law" Adjustments table shows the changes from the base appropriation to the adopted budget. "Statewide Present Law" adjustments (DP 1, DP 2, DP 3) are standard categories of adjustments made to all agencies. Decisions on these items were applied globally to all agencies.

	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 1 - Personal Services	0.00	2,052	0	20,746	22,798	0.00	2,446	0	24,727	27,173
DP 2 - Fixed Costs	0.00	0	0	2,069	147,398	0.00	0	0	2,058	175,092
DP 3 - Inflation Deflation	0.00	0	0	7,000	7,862	0.00	0	0	8,000	9,167
DP 20 - SABHRS Rate Adjustment	0.00	0	0	3	224	0.00	0	0	2	212
DP 30 - Motor Pool Rate Adjustment	0.00	0	0	(164)	(184)	0.00	0	0	(151)	(173)
Grand Total All Present Law Adjustments	0.00	\$2,052	\$0	\$29,654	\$178,098	0.00	\$2,446	\$0	\$34,636	\$211,471

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

DP 1 - Personal Services -

The legislature adopted adjustments to the present law personal services budget for expected changes, management decisions and budget modifications.

DP 2 - Fixed Costs -

The legislature adopted adjustments to provide the funding required in the proposed budget for fixed costs assessed by other agencies within state government for the services they provide. Examples include: warrant writer, motor pool, information technology services, etc. The rates charged for these services are approved in the section of the budget that provides the services.

DP 3 - Inflation Deflation -

The legislature adopted adjustments to reflect budgetary changes generated from the application of inflation and deflation factors to specific expenditure accounts. Affected accounts include: other services, supplies and materials, communications, in-state motor pool and motor pool leased vehicles, and repair and maintenance.

DP 20 - SABHRS Rate Adjustment -

The legislature adopted an increase to proposed SABHRS rates.

DP 30 - Motor Pool Rate Adjustment -

The legislature adopted a reduction to proposed motor pool rates.

New Proposals

The "New Proposals" table shows new changes to spending.

New Proposals	-----Fiscal 2024-----					-----Fiscal 2025-----				
	FTE	General Fund	State Special	Federal Special	Total Funds	FTE	General Fund	State Special	Federal Special	Total Funds
DP 99 - New Fixed Costs	0.00	0	0	0	328	0.00	0	0	0	328
DP 333 - Adjustment to Inflation	0.00	0	0	(3,196)	(3,590)	0.00	0	0	(3,861)	(4,424)
DP 555 - Additional Vacancy Savings	0.00	(649)	0	(6,181)	(6,830)	0.00	(653)	0	(6,222)	(6,875)
Total	0.00	(\$649)	\$0	(\$9,377)	(\$10,092)	0.00	(\$653)	\$0	(\$10,083)	(\$10,971)

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

DP 99 - New Fixed Costs -

The legislature adopted an appropriation for the agency to provide funding for a new fixed cost for the State Management Training Center. The rates charged for this service are approved in the section of the budget that provides the services.

DP 333 - Adjustment to Inflation -

The legislature adopted an adjustment to inflation included in DP 3.

DP 555 - Additional Vacancy Savings -

The legislature adopted an additional 1.0% vacancy savings.