

MINUTES OF THE MEETING
INSTITUTIONS AND CULTURAL EDUCATION SUBCOMMITTEE
50TH LEGISLATIVE SESSION
HOUSE OF REPRESENTATIVES

February 10, 1987

The twenty-fifth meeting of the Institutions and Cultural Education Subcommittee was called to order in room 202-A of the state capitol on February 10, 1987, at 8:08 a.m. by Chairman Miller.

ROLL CALL: All members were present as were Keith Wolcott, Senior Analyst for the Legislative Fiscal Analyst (LFA); Alice Omang, secretary; George Harris of the Office of Budget and Program Planning (OBPP); and various other guests.

HISTORICAL SOCIETY: Tape: 25-1-A:010

Mr. Harris recapped the budget issues and the modifications as per exhibit 1, pages S-107 and S-108 for the Magazine Program.

Dr. Robert Archibald, Director of the Historical Society, advised that there was another modification, which would allow increased spending authority as reflection of their estimate of increased revenues based on increases in subscriptions and increased price, which was increased about two months ago from \$15 to \$18.

(170) Mr. Wolcott gave an overview of the LFA budget as per exhibit 2, page E-88 through page E-90. He distributed to the committee exhibits 3 and 4 and outlined the issues under operating expenses and funding.

He briefed the committee on exhibit 5, a modification for magazine promotion, exhibit 6, current level services only for the Magazine Program, exhibit 7, a modification for increased spending for the Centennial, and exhibit 8, which is a modified level for services only for the press expansion.

(340) Mr. Harris, referring to exhibit 1, page S-108, outlined the Historical Sites Preservation Program.

Senator Bengtson commented that this is one program that she would like to cut back completely and she documented some problems that were encountered over an old barn that was to be removed to allow for a ramp to be constructed to get off the interstate.

There was some discussion over this and some explanation by Dr. Archibald.

(500) Mr. Wolcott, referring to exhibit 1, pages E-90 to E-92, summarized the LFA budget on Historic Sites Preservation and presented exhibits 9 and 10, explaining the differences between the LFA and OBPP's budgets.

There was further comments concerning the value of the preservation of historic sites versus the money restraints the state is having and all the different priorities.

Tape 25-1-B:052: Senator Bengtson said that if there were some way they could cut down on the program, she would like to do it without jeopardizing federal funds.

(176) Mr. Harris reviewed the Archives Program as per exhibit 1, page S-108 and S-109.

(210) Mr. Wolcott referred to pages E-92 through E-94, exhibit 2 and explained the issues in exhibits 11 and 12.

Brian Cockhill, Administrative Officer of the Centralized Services of the Montana Historical Society, advised that two positions had been filled by temporary help and the budget was prepared when the temporary help was employed and, therefore, this caused the difference in issue 1 under personal services.

Mr. Wolcott distributed exhibits 13 and 14 and explained these to the committee.

(250) Mr. Harris, referring to exhibit 1, pages S-107 and S-108, recapped the Photograph Archives Program.

(290) Mr. Wolcott, referring to exhibit 2, pages E-94 and E-95, summarized this program. He recapped the issues on exhibit 15 and 16 with the committee.

Dr. Archibald informed the committee that this program has just received a grant from L. G. and Mary Skaggs Foundation to photograph some murals around the state in the amount of \$5,000 and they would request a modification to spend that money.

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Page Three

(352) Mr. Harris explained the Education Program as per exhibit 1, page S-109.

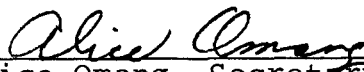
(375) Mr. Wolcott, referring to exhibit 2, page E-95, gave an overview of this program. He briefed the committee on issue 1 of personal services in exhibit 17 and explained that the difference was \$15,531 as per exhibit 18, which is almost all general fund money.

Clark Pfyer, a private citizen, stated that he has worked with the Society and he knows how important the tour train is to Helena and particularly to Montana. He said that he hoped whatever the committee did that it would enhance the Society as it is a great and positive asset. He concluded that the volunteers do a tremendous job in the museum also.

ADJOURNMENT: There being no further business, the meeting was adjourned at 9:37 a.m.



REPRESENTATIVE MILLER, Chairman



Alice Omang, Secretary

2/10/87
George Hanals

HISTORICAL SOCIETY

S-107

These are federal and private funds to complete conservation work for the new Montana history exhibit.

Public Photo - \$3,000 FY88 \$3,000 FY89

These are private donation funds to be used to provide photos to the public on a cost recovery basis.

Museum Exhibit Renovation - \$40,000 FY88 \$40,000 FY89
These are donated funds to be used to complete museum exhibit renovations.

MAGAZINE PROGRAM Budget Detail Summary	Actual	Budgeted	Recommendation	
	FY 1986	FY 1987	FY 1988	FY 1989
Full Time Equivalent Employees	6.00	6.00	6.00	6.00
Personal Services	135,932.69	135,974	133,801	133,529
Operating Expenses	292,033.20	265,893	332,990	373,728
Equipment	2,187.05	0	0	0
Transfers	41,320.00	0	41,320	41,320
Total Program Costs	\$471,472.94	\$401,867	\$508,111	\$548,577
General Fund	41,320.00	39,958	41,538	41,347
Proprietary Fund	430,152.94	361,909	466,573	507,230
Total Funding Costs	\$471,472.94	\$401,867	\$508,111	\$548,577
Current Level Services	440,390.63	401,867	458,111	463,577
Modified Level Services	31,082.31	0	50,000	85,000
Total Service Costs	\$471,472.94	\$401,867	\$508,111	\$548,577

Program Description

The Publications Program exists to fulfill one of the primary roles of the Society - "to promote the study of Montana History by lectures and publications" (section 22-3-108(15), MCA). The program publishes Montana the Magazine of Western History and the Montana Post, the official newsletter of the Society, on a quarterly schedule. It also publishes books under the Montana Historical Society Press imprint. The program is also responsible for the operation of the retail and mail order museum store operation.

Budget Issues

A 4% vacancy savings factor was applied to the Magazine Program.

The agency's best projection of goods purchased for resale for the magazine enterprise operation is \$23,000 less than current level. This reduction is also reflected in the enterprise funding. If tourism and traffic through the store is higher than expected the agency will seek an increase in its authority by the budget amendment process. There was a budget amendment in FY86 for this purpose.

Modification Requests

- * Magazine Promotion - FY88 \$5,000 FY89 \$5,000
This modification will promote awareness of the Western History magazine. This request, which includes printing costs, is funded by proprietary funds from the sale of magazines.
- * Centennial Increase - FY88 \$30,000 FY89 \$40,000
This authority is for increased tourism sales anticipated during the centennial. Proprietary money from the sale of goods will fund this request.
- * Centennial Press Expansion - FY88 \$15,000 FY89 \$40,000
This modification will be funded by revolving funds generated from the sale of publications. The purpose of the request is to serve schools and the general public due to interest generated by the centennial celebration. The Historical Society intends to publish such items as a centennial anthology of Montana authors, a series of articles on various periods leading to the centennial, a series of publications for Montana schools for social studies, an atlas of Montana geology and history, and other publications.

PHOTOGRAPH ARCHIVES PROGRAM Budget Detail Summary	Actual	Budgeted	Recommendation	
	FY 1986	FY 1987	FY 1988	FY 1989
Full Time Equivalent Employees	3.50	3.50	3.50	3.50
Personal Services	81,912.67	85,554	87,583	87,623
Operating Expenses	10,032.07	10,902	12,325	11,625
Equipment	1,184.57	0	1,000	200
Total Program Costs	\$93,129.31	\$96,456	\$100,908	\$99,448
General Fund	80,984.98	78,482	83,992	83,132
Federal & Other Spec Rev Fund	12,144.33	17,974	16,916	16,316
Total Funding Costs	\$93,129.31	\$96,456	\$100,908	\$99,448
Current Level Services	93,129.31	96,456	100,908	99,448
Total Service Costs	\$93,129.31	\$96,456	\$100,908	\$99,448

Program Description

The Photograph Archives Program exists to collect, organize, preserve and make accessible to the public photographic

images and other iconographic material pertinent to the study of Montana history, and to provide support for

(1)

exhibitions and publications of the Society and others using such images.

Budget Issues

- * The Photograph Archives Program was established in FY87. This program is the photograph archives function previously contained in the Archives Program. There were 3.50 FTE moved out of Archives and placed in this new program. The FY86 expenditures shown are the actual expenditures for this function for that portion of the Archives Program that was transferred into the new Photo Archives Program. The

FY87 budgeted column was also derived from the Archives program and transferred to the new Photograph Archives Program.

This program is recommended at 3.50 FTE for FY88 and FY89. A 4% vacancy savings factor has been applied to these personal services.

The operational expenses shown for this program are that portion of the Archives budget that has been transferred.

Photographic equipment is recommended for this new program.

HIST SITES PRESERVATION PROG Budget Detail Summary	Actual		Recommendation	
	FY 1986	Budgeted FY 1987	FY 1988	FY 1989
Full Time Equivalent Employees	7.00	7.00	6.50	6.50
Personal Services	169,536.88	165,176	168,004	167,802
Operating Expenses	49,565.74	57,817	47,033	43,326
Equipment	914.91	0	0	0
Grants	255,388.61	610,000	610,000	610,000
Total Program Costs	\$475,406.14	\$832,993	\$825,037	\$821,128
General Fund	74,646.78	72,340	61,467	59,498
Federal & Other Spec Rev Fund	400,759.36	760,653	763,570	761,630
Total Funding Costs	\$475,406.14	\$832,993	\$825,037	\$821,128
Current Level Services	475,406.14	832,993	825,037	821,128
Total Service Costs	\$475,406.14	\$832,993	\$825,037	\$821,128

Program Description

The staff of the Historical Sites Preservation Program administer the federal Historic Preservation Act and the federal grants-in aid for historic preservation. They also review all federally proposed projects within the state to determine their effect on historical properties listed in the National Register of Historic Places and those eligible for listing. The office certifies historic structures and rehabilitation projects for the federal tax credit offered in the Tax Reform Act of 1976 and oversees Montana's State Antiquities Act. The program is authorized by section 22-3-421, MCA.

A 4% vacancy savings factor has been applied to this program.

- * Operational expenses were reduced by \$3,458 in travel to help cover unfunded pay increases and percentage reductions. Travel expenditures were less in FY86 because a position was vacant most of the year.

- * A one time federal grant for refinishing highway historical signs will not continue in FY88 and FY89 because this project will be completed by the end of FY87.

Budget Issues

- * A .50 FTE was reduced to cover unfunded pay increases and percentage reductions. This is the general fund portion of a historic preservation officer position.

- * Federal funds for historic preservation have been significantly increased over the current level. These are survey and planning grants to local governments for historic preservation projects.

ARCHIVES PROGRAM Budget Detail Summary	Actual		Recommendation	
	FY 1986	Budgeted FY 1987	FY 1988	FY 1989
Full Time Equivalent Employees	7.50	5.00	5.00	5.00
Personal Services	169,465.26	119,273	123,918	124,155
Operating Expenses	23,619.49	6,100	17,531	17,531
Equipment	286.60	1,391	0	0
Total Program Costs	\$193,371.35	\$126,764	\$141,449	\$141,686
General Fund	118,404.29	126,764	138,949	139,186
State Special Revenue Fund	38,366.97	0	0	0
Federal & Other Spec Rev Fund	36,600.09	0	2,500	2,500
Total Funding Costs	\$193,371.35	\$126,764	\$141,449	\$141,686
Current Level Services	193,371.35	126,764	130,949	131,186
Modified Level Services	0.00	0	10,500	10,500
Total Service Costs	\$193,371.35	\$126,764	\$141,449	\$141,686

Program Description

- * The Archives Program was created as a separate program of the society on July 1, 1977. Its major functions are to ac-

quire, preserve, and assure public access to historically valuable private manuscripts and state records. Authority for its activities is provided in section 22-3-202, MCA.

Budget Issues

The Archives Program was budgeted for 8.50 FTE in FY86 and FY87. 3.50 FTE were transferred to the new Photograph Archives Program established during FY86. Thus, FY88 and FY89 reflect a request of 5.00 FTE. The FY86 actual FTE of 7.50 includes a 1.50 FTE statutorily funded through coal tax money for cultural and aesthetic projects, and 1.00 FTE which was approved for the Holter collection project and funded by private donations.

A 4% vacancy savings has been applied to the Archives Program.

The reduction in operations reflects the transfer of operational costs to the new Photograph Archives Program.

The Cultural and Aesthetic Project is statutorily established and is not reflected in FY87, FY88 or FY89. Priority for these coal tax funds is established by the Legislature. The Historical Society applies for these funds through the Arts

Council. These funds will be used to complete an ongoing oral history project.

Donations funding is not shown in FY87, FY88 or FY89 because they were used for the recently completed Holter collection.

Federal grants for a project dealing with local government records has now been completed and are not shown in the requested budget.

Modification Request

Advisory Council Travel - FY88 \$2,500 FY89 \$2,500

This request is to use federal grant funds for the Montana Historical Records Advisory Committee to attend three required meetings each year. There are twelve members on this committee.

Microfilming - FY88 \$8,000 FY89 \$8,000

This is a general fund request for the microfilming of selected state records of heavily used documents of permanent value and historical significance.

EDUCATION PROGRAM Budget Detail Summary	Actual	Budgeted	Recommendation	
	FY 1986	FY 1987	FY 1988	FY 1989
Full Time Equivalent Employees	2.50	2.50	1.00	1.00
Personal Services	45,310.11	42,126	32,323	32,265
Operating Expenses	20,670.60	38,091	19,875	19,875
Total Program Costs	\$65,980.71	\$80,217	\$52,203	\$52,140
General Fund	17,788.31	14,389	0	0
Federal & Other Spec Rev Fund	48,192.40	65,828	52,203	52,140
Total Funding Costs	\$65,980.71	\$80,217	\$52,203	\$52,140
Current Level Services	65,980.71	80,217	52,203	52,140
Total Service Costs	\$65,980.71	\$80,217	\$52,203	\$52,140

Program Description

The Education Program staff provide the interested public with access to Historical Society resources through thematic presentations using reproductions or facsimiles of its collections. The program's activities include interpretation of exhibits within the building or on historical sites, coordination of volunteer programs, provision of professional assistance to other cultural organizations in Montana, development and implementation of school programs, sponsorship of lectures and traveling exhibits, and coordination of the capital tours program.

Budget Issues

The Capitol Tours Program has been recommended for deletion to cover unfunded pay plan increases, percentage reductions and to stay within expenditure levels established by the legislature.

This accounts for the reduction of 1.50 FTE from the current level of 2.5 FTE. The remaining 1.00 FTE is the education program manager who has statewide responsibilities.

A 4% vacancy savings factor is applied to this program.

The general fund was eliminated in this program because it was used to fund the capitol tour positions.

EXHIBIT 2
2/10/88
K. Wolcott

PUBLICATION					
Budget Item	Actual	Appropriated	- - Current Level - -		% Change
	Fiscal 1986	Fiscal 1987	Fiscal 1988	Fiscal 1989	1987-89 Biennium
F.T.E.	6.00	6.00	6.00	6.00	0.00
Personal Service	\$135,935	\$135,974	\$133,842	\$133,571	(1.7)
Operating Expense	292,047	265,893	277,890	277,045	(0.5)
Equipment	2,190	-0-	-0-	-0-	(100.0)
Total Operating Costs	\$430,172	\$401,867	\$411,732	\$410,616	(1.2)
Non-Operating Costs	41,320	-0-	41,320	41,320	100.0
Total Expenditures	<u>\$471,492</u>	<u>\$401,867</u>	<u>\$453,052</u>	<u>\$451,936</u>	<u>3.6</u>
<u>Fund Sources</u>					
General Fund	\$ 41,323	\$ 39,958	\$ 41,320	\$ 41,320	1.7
Proprietary Fund	430,169	361,909	411,732	410,616	3.8
Total Funds	<u>\$471,492</u>	<u>\$401,867</u>	<u>\$453,052</u>	<u>\$451,936</u>	<u>3.6</u>

The Magazine Program is responsible for publishing Montana, the Magazine of Western History, society sponsored quarterlies, books, brochures, catalogs, prints, and other publications. Additionally, this program is responsible for the operation of the society's museum store and merchandising program.

General fund is included to fund 22.8 percent of the cost of publishing Montana, the Magazine of Western History. The remainder is financed from magazine sales estimated at \$139,843 in fiscal 1988 and \$140,289 in fiscal 1989. Proprietary authority of \$31,042 is provided each year of the biennium for publications and \$199,081 in fiscal 1988 and \$199,009 in fiscal 1989 is provided for the operation of the merchandising activities. The magazine sales proprietary account has been increased \$41,320 each year to reflect the requirements of management memo 2-86-5. Management memo 2-86-5 states: The reporting of a proprietary operation's activity within one fund is essential for readers to determine the total cost of providing that service and the extent to which user charges cover that cost. Therefore, amounts provided to proprietary funds from other funds should be classified in accordance with the inter-entity transaction provisions discussed in Management Memo 2-83-3.

Personal services decreases 1.7 percent because the program converted one grade 10 FTE to a grade 12 and one grade 10 FTE to a grade 5. The net result is an overall reduction to personal services of approximately \$4,500 or 1.7 percent. Operating costs remain nearly the same into the 1989 biennium.

(2) KW

Fiscal 1986: Comparison of Actual Expenses to the Appropriation

The following table compares fiscal 1986 actual expenditures and funding to appropriations as anticipated by the 1985 legislature.

Table 4
Comparison of the Appropriation to Actual Expenses - Fiscal 1986

<u>Budget Item</u>	<u>Legislature</u>	<u>Actual</u>	<u>Difference</u>
F.T.E.	6.00	6.00	0.00
Personal Service	\$137,365	\$130,726	\$ 6,639
Operating Expense	266,230	266,588	(358)
Equipment		1,770	(1,770)
Total Operating Costs	<u>\$403,595</u>	<u>\$399,084</u>	<u>\$ 4,511</u>
<u>Funding</u>			
General Fund	\$ 41,320	\$ 41,323	\$ (3)
Merchandising	150,027	150,666	(639)
Magazine	139,287	139,129	158
Publications	72,961	67,966	4,995
Total Funds	<u>\$403,595</u>	<u>\$399,084</u>	<u>\$ 4,511</u>
<u>Additions:</u>			
Budget Amendments & Transfers			
Proprietary	<u>\$ 83,320</u>	<u>\$ 72,408</u>	<u>\$ 10,912</u>

This program achieved overall savings of approximately \$4,500 after adjusting for budget amendments and program transfers. The program requested and received budget amendments in the magazine program for additional subscriptions from the Western History Association and for expanded sales in the merchandising program.

There were two positions vacant for a part of fiscal 1986 resulting in a savings of \$6,639. The program expended \$1,770 on equipment that was not budgeted. The merchandising appropriation was overexpended \$639 while the magazine appropriation was \$158 under expended and the publications fund was \$4,995 under the authorized because revenues were not generated by the program.

Current Level Adjustments

Legislative audit costs of \$1,080 are included in fiscal 1988 with the merchandising program paying \$634 while the magazine program pays the \$446 remaining balance. Professional contracts were increased \$3,130 each year of the biennium for the merchandising operations, promotions, and the publishing program for manuscript development. Graphics arts/typesetting was increased \$5,000 for typesetting brochures, promotional material signs, mailing labels, and other printed

items associated with marketing the magazine, books, and museum store goods. The inventory adjustment of a negative \$2,290 was zeroed-out, which has the effect of increasing total expenses.

Actual total operating costs decrease 1.2 percent from the 1987 biennium primarily due to the decrease in personal services of 1.7 percent. This decrease results from the net difference after changing one grade 10 FTE to a grade 12 and one grade 10 FTE to a grade 5. General fund is included at the fiscal 1986 level for both years of the 1989 biennium, while proprietary funds decline 3.6 percent based on estimated revenue from merchandise and magazine sales.

HISTORIC SITES PRESERVATION

Budget Item	Actual	Appropriated	- - Current Level - -		% Change 1987-89 Biennium
	Fiscal 1986	Fiscal 1987	Fiscal 1988	Fiscal 1989	
F.T.E.	7.00	7.00	7.00	7.00	0.00
Personal Service	\$169,537	\$165,176	\$181,301	\$181,078	8.3
Operating Expense	49,569	57,817	39,886	36,107	(29.2)
Equipment	915	-0-	-0-	-0-	(100.0)
Total Operating Costs	\$220,021	\$222,993	\$221,187	\$217,185	(1.0)
Non-Operating Costs	255,389	610,000	610,000	610,000	41.0
Total Expenditures	<u>\$475,410</u>	<u>\$832,993</u>	<u>\$831,187</u>	<u>\$827,185</u>	<u>26.7</u>
Fund Sources					
General Fund	\$ 74,650	\$ 72,340	\$ 64,161	\$ 62,097	(14.1)
Federal Revenue	400,760	760,653	767,026	765,088	31.9
Total Funds	<u>\$475,410</u>	<u>\$832,993</u>	<u>\$831,187</u>	<u>\$827,185</u>	<u>26.7</u>

This program is responsible for implementing the National Historic Preservation Act and the State Antiquities Act. Activities include nominating sites to the National Register, reviewing tax certification projects, administering federal grants-in-aid, reviewing federal projects to determine and comment on any impacts to historic and cultural properties, and coordination with local governments, state agencies, and the public on matters relating to historic preservation.

The general fund support of operating costs in this program decreases from 34 percent of total operating costs to 29 percent in the 1989 biennium as overall costs decrease and estimated federal historic preservation operating funds increase.

Fiscal 1986: Comparison of Actual Expenses to the Appropriation

The following table compares fiscal 1986 actual expenditures and funding to appropriations as anticipated by the 1985 legislature.

Table 5
Comparison of the Appropriation to Actual Expenses - Fiscal 1986

<u>Budget Item</u>	<u>Legislature</u>	<u>Actual</u>	<u>Difference</u>
F.T.E.	7.00	7.00	0.00
Personal Service	\$167,118	\$169,537	\$ (2,419)
Operating Expense	59,207	46,569	12,638
Equipment	-0-	915	(915)
Total Operating Costs	\$226,325	\$217,021	\$ 9,304
Non-Operating Costs	595,000	255,389	339,611
Total Expenditures	<u>\$821,325</u>	<u>\$472,410</u>	<u>\$348,915</u>
<u>Funding</u>			
General Fund	\$ 75,431	\$ 74,650	\$ 781
Federal Revenue	745,894	397,760	348,134
Total Funds	<u>\$821,325</u>	<u>\$472,410</u>	<u>\$348,915</u>
<u>Additions</u>			
HB 565 Historic Highway Markers	<u>\$190,525</u>	<u>\$ 3,000</u>	<u>\$187,525</u>

The program overspent their authorized personal services by \$2,419 because of not realizing their budgeted vacancy savings of \$7,211. The program had contracted services savings of \$30,502 offset by overexpenditures in all other categories for an operating savings of \$12,638. Only \$255,389 of the historic preservation subgrants were expended in fiscal 1986 as federal funds did not materialize as anticipated, leaving a balance of \$339,611 in federal non-operating authority.

The program had general fund savings of \$781 after the Governor's cuts of \$200. Federal funds did not materialize as anticipated. With total grant revenue of \$423,953, of which \$26,193 was transferred out to other programs, the actual revenue level was \$348,134 under the authorized expenditure level. In addition, only \$3,000 of the \$190,525 authorized in House Bill 565 was spent in fiscal 1986 for historical highway markers.

Current Level Adjustments

Personal services increase 8.3 percent as a result of upgrades for 6 of the 7 positions in the program. Five FTE historic preservation officers were upgraded from grade 13 to grade 14 at a cost of \$10,330 each year and 1 FTE historic preservation program manager at a cost of \$2,419 each year or a biennial cost of \$25,498. Two temporary FTE added by the 1985 legislature are retained in the 1989 biennium to continue to reduce the backlog of requests from communities seeking nomination of sites to the National Register of Historic Places.

Legislative audit fees of \$3,780 are included in fiscal 1988 with 16 percent funded by general fund and 84 percent funded with federal funds, which is the proportion of general funds to total funds expended in fiscal 1986. Consultant travel was reduced \$2,012, and office supplies were reduced \$1,000 to levels expended in fiscal 1984 and 1985. Long distance charges were reduced \$2,000 to the fiscal 1986 authorized level as were travel costs, which were reduced \$3,000 overall. Maintenance was reduced \$1,600 to the fiscal 1986 authorized level.

Grants were increased \$354,611 to the requested level of \$610,000. This provides for regrants to local governments for historic site preservation. This level coincides with the fiscal 1987 authorized level.

General fund decreases 14.1 percent from the 1987 biennium to the 1989 biennium while federal funds increase 31.9 percent. Federal funds increase primarily due to the low level of expenditure on grants in fiscal 1986 and the increase in estimated operating funds available in the federal grant based on the agency's request.

ARCHIVES

Budget Item	Actual	Appropriated	- - Current Level - -		% Change
	Fiscal 1986	Fiscal 1987	Fiscal 1988	Fiscal 1989	1987-89 Biennium
F.T.E.	11.00	8.50	5.00	5.00	(3.5)
Personal Service	\$251,380	\$246,853	\$120,391	\$120,452	(51.7)
Operating Expense	33,664	30,819	10,014	10,017	(68.9)
Equipment	1,471	3,118	-0-	-0-	(100.0)
Total Expenditures	<u>\$286,515</u>	<u>\$280,790</u>	<u>\$130,405</u>	<u>\$130,469</u>	<u>(54.0)</u>
<u>Fund Sources</u>					
General Fund	\$199,395	\$205,246	\$130,405	\$130,469	(35.5)
State Special	38,372	57,570	-0-	-0-	(100.0)
Federal Revenue	48,748	17,974	-0-	-0-	(100.0)
Total Funds	<u>\$286,515</u>	<u>\$280,790</u>	<u>\$130,405</u>	<u>\$130,469</u>	<u>(54.0)</u>

The Archives Program is responsible for collecting, preserving, organizing, and making accessible to the public, unpublished material relevant to Montana's history.

Also included in this program is the oral history project funded from cultural and aesthetic project grant funds. The general fund provides nearly 91 percent of the funding for this program with the remainder of the funding from private donations.

This program decreases 54 percent from the 1987 biennium for two reasons. First, the agency has split the Archives Program into two programs, with the other program set up specifically for photographs and related material. This split reduces FTE in this program by 3.5 to 5 FTE. The second reason results from not including oral history funds in the 1989 biennium that were appropriated in the 1987 biennium through House Bill 933.

Fiscal 1986: Comparison of Actual Expenses to the Appropriation

The following table compares fiscal 1986 actual expenditures and funding to appropriations as anticipated by the 1985 legislature.

Table 6
Comparison of the Appropriation to Actual Expenses - Fiscal 1986

<u>Budget Item</u>	<u>Legislature</u>	<u>Actual</u>	<u>Difference</u>
F.T.E.	8.50	9.50	(1.00)
Personal Service	\$202,956	\$214,087	\$(11,131)
Operating Expense	61,574	32,868	28,706
Equipment	500	1,184	(684)
Total Expenditures	<u>\$265,030</u>	<u>\$248,139</u>	<u>\$ 16,891</u>
<u>Funding</u>			
General Fund	\$202,262	\$199,391	\$ 2,871
Private Donations	25,000	21,915	3,085
Photograph Program	17,768	12,148	5,620
Federal	20,000	14,685	5,315
Total Funds	<u>\$265,030</u>	<u>\$248,139</u>	<u>\$ 16,891</u>
<u>Additions</u>			
HB938 Oral History	<u>\$ 95,937</u>	<u>\$ 38,372</u>	<u>\$ 57,565</u>

The program overexpended their authorized personal services by \$11,131. This results from adding 1 unauthorized FTE for the Holter project. This was mitigated somewhat by vacancies in two authorized positions, which generated approximately \$10,500 in savings.

Operating costs were underspent \$28,706 primarily in contracted services. Two projects were authorized and funded in contracted services for fiscal 1986. One was the development of a handbook for local governments on preserving and organizing records and the other was the cataloging of the Holter collection.

The program had general fund savings of \$2,871 in addition to the Governor's cuts of \$8,111. The Holter project, funded with a private donation of \$25,000, was completed with a balance of \$3,085. All available photograph program funds were spent, leaving \$5,620 excess authority. The federal grant for local government records has a remaining balance of \$5,315. The program spent \$38,372 of the oral history project biennial appropriation, which added 1.5 FTE.

Current Level Adjustments

Personal services decrease 51.7 percent with the transfer of 3.5 FTE to the new Photographic Archives Program and the elimination of 1.0 FTE. Operating costs decrease 68.9 percent with the completion of the special projects in the 1987 biennium and the transfer of the Photographic Archives Program operating costs.

General fund decreases 35.5 percent for this program. Photograph program funds are transferred to the Photograph Archives Program. The Holter funds were provided for a one-time project and are not continued in the 1989 biennium. The federal funds for development of a local government handbook were for the 1987 biennium only.

PHOTOGRAPH ARCHIVES					
<u>Budget Item</u>	Actual Fiscal <u>1986</u>	Appropriated Fiscal <u>1987</u>	- - Current Level - -		% Change 1987-89 Biennium
			Fiscal <u>1988</u>	Fiscal <u>1989</u>	
F.T.E.	0.00	0.00	3.50	3.50	N/A
Personal Service	\$ -0-	\$ -0-	\$87,208	\$87,248	N/A
Operating Expense	<u>-0-</u>	<u>-0-</u>	<u>11,381</u>	<u>11,383</u>	<u>N/A</u>
Total Expenditures	\$ -0- =====	\$ -0- =====	\$98,589 =====	\$98,631 =====	N/A =====
<u>Fund Sources</u>					
General Fund	\$ -0-	\$ -0-	\$80,989	\$81,631	N/A
Federal Revenue	<u>-0-</u>	<u>-0-</u>	<u>17,600</u>	<u>17,000</u>	<u>N/A</u>
Total Funds	\$ -0- =====	\$ -0- =====	\$98,589 =====	\$98,631 =====	N/A =====

The Photograph Archives Program is a new program split off from the Archives Program. The program exists to collect, organize, preserve, and make accessible to the public photographic images and other iconographic material pertinent to the study of Montana history, and to provide support for exhibitions and publications of the Society and others using such images.

The program has 1.0 FTE archivist, a 1.0 FTE photographer, a 0.50 FTE Library clerk, and a 1.0 FTE library technician. All positions were previously in the Archives Program. The program is funded primarily with general fund, with the balance from a small amount of the society's private donations. The program

increases 5.8 percent from fiscal 1986 to fiscal 1988 with no increase in general fund. Private donations support increases 45 percent or \$5,456 in fiscal 1988. General fund increases \$642 from fiscal 1988 to fiscal 1989, while private donations decrease \$600. Total costs increase \$42.

EDUCATION

Budget Item	Actual	Appropriated	- - Current Level - -		% Change 1987-89 Biennium
	Fiscal 1986	Fiscal 1987	Fiscal 1988	Fiscal 1989	
F.T.E.	2.50	2.50	2.05	2.05	(0.45)
Personal Service	\$45,308	\$42,126	\$47,859	\$47,781	9.4
Operating Expense	<u>20,671</u>	<u>38,091</u>	<u>19,758</u>	<u>19,762</u>	(32.7)
Total Expenditures	<u>\$65,979</u> =====	<u>\$80,217</u> =====	<u>\$67,617</u> =====	<u>\$67,543</u> =====	(7.5) =====
Fund Sources					
General Fund	\$17,786	\$14,389	\$14,179	\$14,152	(11.9)
Federal Revenue	<u>48,193</u>	<u>65,828</u>	<u>53,438</u>	<u>53,391</u>	(6.3)
Total Funds	<u>\$65,979</u> =====	<u>\$80,217</u> =====	<u>\$67,617</u> =====	<u>\$67,543</u> =====	(7.5) =====

This program is responsible for providing exhibits and materials using society resources and expertise to schools, museums, libraries, and other public institutions throughout the state. Capitol tours are also administered through this program. Personal services increase in the 1989 biennium even though the FTE are reduced by 0.45. This increase results from the vacancy savings in fiscal 1986 and 5 percent cuts applied to fiscal 1987. Capitol tour brochures authorized in fiscal 1986 were not printed and are not included in the current level, which results in the decrease in operating expenses into the 1989 biennium. Funding for this program is provided by the general fund, private donations, and federal funds. General fund decreases 11.9 percent while private donations decrease 9.5 percent and federal funds increase 42.6 percent.

Fiscal 1986: Comparison of Actual Expenses to the Appropriation

The following table compares fiscal 1986 actual expenditures and funding to appropriations as anticipated by the 1985 legislature.

Table 7
Comparison of the Appropriation to Actual Expenses - Fiscal 1986

<u>Budget Item</u>	<u>Legislature</u>	<u>Actual</u>	<u>Difference</u>
F.T.E.	2.50	2.50	0.00
Personal Service	\$48,796	\$45,308	\$ 3,488
Operating Expense	<u>38,124</u>	<u>20,671</u>	<u>17,453</u>
Total Expenditures	<u>\$86,920</u>	<u>\$65,979</u>	<u>\$20,941</u>
<u>Funding</u>			
General Fund	\$21,484	\$17,786	\$ 3,698
Private Donations	57,436	43,180	14,256
Federal	<u>8,000</u>	<u>5,013</u>	<u>2,987</u>
Total Funds	<u>\$86,920</u>	<u>\$65,979</u>	<u>\$20,941</u>

Personal services were \$3,488 under the authorized level after the Governor's cut of \$3,200. These savings were generated in the information officer position and the tour guide position. Operating savings of \$16,763 in contracted services and \$400 in supplies were offset by over expenditures in communications, travel, and repairs.

The general fund savings are \$3,698 after the Governor's cuts of \$3,200. Private donations savings amounted to \$22,256 from the authorized level. However, the program reduced donations authority and increased federal authority to allow for a federal grant from the Montana Committee for the Humanities to partially fund the annual Montana History Conference.

Current Level Adjustments

Personal services increase 9.4 percent even after reducing 0.45 FTE from the program. An administrative assistant was reduced from a 0.75 FTE to 0.40 FTE and a tour guide position was reduced from a 0.75 to a 0.65 FTE. These reductions saved approximately \$9,600 each year. The balance of the increase is due to vacancy savings realized in fiscal 1986 and the cuts applied to personal services in the fiscal 1987 budget. Travel costs were decreased \$750 to the fiscal 1985 expenditure level while other minor adjustments totalled \$169.

General fund decreases 11.9 percent from the 1987 biennium to the 1989 biennium. Federal funds are included at \$5,000 each year to help fund the annual Montana History Conference. Donated funds increase \$5,257 from the fiscal 1986 actual to fiscal 1988. However, with the fiscal 1987 appropriated level of \$63,828, total donated funds decrease 9.5 from the 1987 biennium to the 1989 biennium.

Exhibit 3
2/10/87
K. W. O. L. off

AGENCY: HISTORICAL SOCIETY BD OF TR

LEGISLATIVE ACTION

PROGRAM: MAGAZINE PROGRAM

BUDGET ITEM	FY 1986 Actual	Fiscal 1988		Fiscal 1989		FY 86-88 % Change
		Executive Current Level	Difference	Executive Current Level	Difference	
FTE	6.00	6.00	0.00	6.00	0.00	0.00
Personal Services	\$135,935	\$133,801	(\$41)	\$133,529	(\$42)	-0.02
Operating Expenses	\$292,047	\$282,990	\$5,100	\$277,045	\$11,683	-0.05
Equipment	\$2,190	\$0	\$0	\$0	\$0	-1.00
Non-Operating	\$41,320	\$41,320	\$0	\$41,320	\$0	0.00
TOTAL EXPENSES	\$471,492	\$458,111	\$5,059	\$451,936	\$11,641	-0.04

FUNDING

General Fund	\$41,323	\$41,538	\$218	\$41,320	\$27	-0.00
Other Revenue	\$430,169	\$416,573	\$4,841	\$410,616	\$11,614	-0.04
TOTAL FUNDING	\$471,492	\$458,111	\$5,059	\$451,936	\$11,641	-0.04

Operating Expenses

- The LFA current level does not include the requested increase for photographic services of \$1,000 in fiscal 1988 and \$1,500 in fiscal 1989. Also, \$1,263 of payroll service fees should be included here instead of program 1.
- The agency requested additional spending authority in the enterprise fund that is not included in the LFA current level. The difference is \$3,617 in fiscal 1988 and \$5,617 in fiscal 1989.

Funding

- The funding of the press should come from profits of the enterprise fund as agreed upon in the 1983 biennium. Therefore the 06013 fund should be increased to the executive level of \$70,846 in fiscal 1988 and \$71,586 in fiscal 1989.

Exhibit
2/10/87
K.W.O.#

OFFICE OF BUDGET & PROGRAM PLANNING
EXECUTIVE BUDGET SYSTEM
AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

REPORT EBSR106
DATE : 01/07/87
TIME : 15/24/40

AGENCY : 5117 HISTORICAL SOCIETY
PROGRAM : 04 MAGAZINE PROGRAM
CONTROL : 00000

AE/OE	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
0000	FULL TIME EQUIVALENT (FTE)	6.00	6.00			6.00	6.00		
1100	SALARIES	116,864	116,864			116,419	116,419		
1400	EMPLOYEE BENEFITS	15,612	15,612			15,774	15,774		
1500	HEALTH INSURANCE	6,900	6,900			6,900	6,900		
1600	VACANCY SAVINGS	-5,575	-5,534	-41		-5,564	-5,522	-42	
	TOTAL SECOND LEVEL	133,801	133,842	-41		133,529	133,571	-42	
2022	SUPPLIES & MATERIALS-INFLATION		4	-4			6	-6	
2023	COMMUNICATIONS-INFLATION	18	1	17		27	1	26	
2025	RENT-INFLATION		601	-601			834	-834	
2100	CONTRACTED SERVICES	46,903	44,830	2,073		50,292	43,750	6,542	
2200	SUPPLIES & MATERIALS	3,530	3,599	-69		3,530	3,599	-69	
2300	COMMUNICATIONS	11,485	11,343	142		11,485	11,343	142	
2400	TRAVEL	3,542	4,327	-785		3,882	4,327	-445	
2500	RENT	7,327	6,587	740		7,327	6,587	740	
2700	REPAIR & MAINTENANCE	1,880	1,879	1		1,880	1,879	1	
2800	OTHER EXPENSES	6,098	6,129	-31		6,098	6,129	-31	
2900	GOODS PURCHASED FOR RESALE	202,207	198,590	3,617		204,207	198,590	5,617	
	TOTAL SECOND LEVEL	282,990	277,890	5,100		288,728	277,045	11,683	
8000	TRANSFERS	41,320	41,320			41,320	41,320		
	TOTAL PROGRAM	458,111	453,052	5,059		463,577	451,936	11,641	
01100	GENERAL FUND	41,538	41,320	218		41,347	41,320	27	
06002	HISTORICAL SOCIETY ENTERPRISE	141,978	199,081	-57,103		141,519	199,009	-57,490	
06003	MAGAZINE SALES	203,749	181,609	22,140		209,125	180,565	28,560	

55,700
63,700

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Exh. A. 1 5
 2/10/87
 K. Wolkoff
 Historical Society

OFFICE OF BUDGET & PROGRAM PLANNING
 EXECUTIVE BUDGET SYSTEM
 AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

REPORT EBSR106
 DATE : 01/07/87
 TIME : 15/29/33

AGENCY : 5117 HISTORICAL SOCIETY
 PROGRAM : 04 MAGAZINE PROGRAM
 CONTROL : 40001 MAGAZINE PROMOTION

AE/OE	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF T FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
2100	CONTRACTED SERVICES	5,000		5,000		5,000		5,000	
	TOTAL PROGRAM	5,000		5,000		5,000		5,000	
06003	MAGAZINE SALES	5,000		5,000		5,000		5,000	
	TOTAL PROGRAM	5,000		5,000		5,000		5,000	

MODIFIED LEVEL SERVICES ONLY

REPORT EBSR106
 DATE : 01/07/87
 TIME : 15/24/40

OFFICE OF BUDGET & PROGRAM PLANNING
 EXECUTIVE BUDGET SYSTEM
 AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

AGENCY : 5117 HISTORICAL SOCIETY
 PROGRAM : 04 MAGAZINE PROGRAM
 CONTROL : 00000

AE/OE	DESCRIPTION	OBPP		LFA		DIFF		SUB-CMT		OBPP		LFA		DIFF		SUB-CMT	
		FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88	FY 88
06013 MI	HISTORICAL SOCIETY PRESS	70,846	31,042	39,804	71,586	31,042	40,544	---	---	---	---	---	---	---	---	---	---
	TOTAL PROGRAM	458,111	453,052	5,059	463,577	451,936	11,641	---	---	---	---	---	---	---	---	---	---

*Exhibit 6
 2/10/87
 K. Wolcott
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Exhibit 2
2/10/87
K. Wobko
Historical Society

OFFICE OF BUDGET & PROGRAM PLANNING
EXECUTIVE BUDGET SYSTEM
AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

REPORT EBSR106
DATE : 01/07/87
TIME : 15/29/33

AGENCY : 5117 HISTORICAL SOCIETY
PROGRAM : 04 MAGAZINE PROGRAM
CONTROL : 40002 INCREASED SPENDING/CENTENNIAL

AE/OE	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF T FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
2900	GOODS PURCHASED FOR RESALE	30,000		30,000		40,000		40,000	
	TOTAL PROGRAM	30,000		30,000		40,000		40,000	
06002	HISTORICAL SOCIETY ENTERPRISE	30,000		30,000		40,000		40,000	
	TOTAL PROGRAM	30,000		30,000		40,000		40,000	

FY 1988
 2/10/87
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OFFICE OF BUDGET & PROGRAM PLANNING
 EXECUTIVE BUDGET SYSTEM
 AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

REPORT EBSR106
 DATE : 01/07/87
 TIME : 15/29/33

AGENCY : 5117 HISTORICAL SOCIETY
 PROGRAM : 04 MAGAZINE PROGRAM
 CONTROL : 40003 HIST. SOC. PRESS EXPANSION/CEN

AE/OE	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF T FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
2900	GOODS PURCHASED FOR RESALE	15,000		15,000		40,000		40,000	
	TOTAL PROGRAM	15,000		15,000		40,000		40,000	
06013	MT HISTORICAL SOCIETY PRESS	15,000		15,000		40,000		40,000	
	TOTAL PROGRAM	15,000		15,000		40,000		40,000	

MODIFIED LEVEL SERVICES ONLY

EXHIBIT 9
2/10/87
K. Wolkoff

AGENCY: HISTORICAL SOCIETY BD OF TR LEGISLATIVE ACTION PROGRAM: HISTORICAL SITES PRESERVATI

BUDGET ITEM	FY 1986 Actual	Fiscal 1988 Executive Current Level	Fiscal 1988 Difference	Fiscal 1989 Executive Current Level	Fiscal 1989 Difference	FY 86-88 % Change
FTE	7.00	6.50	-0.50	7.00	-0.50	0.00
Personal Services	\$169,537	\$168,004	(\$13,297)	\$181,078	(\$13,276)	0.07
Operating Expenses	\$49,569	\$47,033	\$7,147	\$36,107	\$7,219	-0.20
Equipment	\$915	\$0	\$0	\$0	\$0	-1.00
Non-Operating	\$255,389	\$610,000	\$0	\$610,000	\$0	1.39
TOTAL EXPENSES	\$475,410	\$825,037	(\$6,150)	\$827,185	(\$6,057)	0.75
FUNDING						
General Fund	\$74,650	\$61,467	(\$2,694)	\$62,097	(\$2,599)	-0.14
Federal Revenue	\$400,760	\$763,570	(\$3,456)	\$765,088	(\$3,458)	0.91
TOTAL FUNDING	\$475,410	\$825,037	(\$6,150)	\$827,185	(\$6,057)	0.75

Personal Services
1. The executive deleted a 0.50 FTE historic preservation officer that remains in the LFA current level costing \$14,513 in fiscal 1988 and \$14,485 in fiscal 1989.

Operating Expenses
1. The LFA current level reduced the base \$10,464 while the executive reduced the base \$3,458. The difference is \$7,006. The LFA reduced the entire amount from the general fund while the executive reduced the federal funds.

OFFICE OF BUDGET & PROGRAM PLANNING
 EXECUTIVE BUDGET SYSTEM
 AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

REPORT EBSR106
 DATE : 01/07/87
 TIME : 15/24/40

AGENCY : 5117 HISTORICAL SOCIETY
 PROGRAM : 06 HIST SITES PRESERVATION PROG
 CONTROL : 00000

AE/00	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
0000	FULL TIME EQUIVALENT (FTE)	6.50	7.00	-0.50		6.50	7.00	-0.50	
1100	SALARIES	144,132	156,186	-12,054		143,683	155,692	-12,009	
1400	EMPLOYEE BENEFITS	21,212	22,981	-1,769		21,451	23,238	-1,787	
1500	HEALTH INSURANCE	9,660	9,660			9,660	9,660		
1600	VACANCY SAVINGS	-7,000	-7,526	526		-6,992	-7,512	520	
	TOTAL SECOND LEVEL	168,004	181,301	-13,297		167,802	181,078	-13,276	
2022	SUPPLIES & MATERIALS-INFLATION		1	-1			2	-2	
2100	CONTRACTED SERVICES	10,462	8,382	2,080		6,682	4,602	2,080	
2200	SUPPLIES & MATERIALS	3,005	2,105	900		3,005	2,105	900	
2300	COMMUNICATIONS	10,129	8,143	1,986		10,129	8,143	1,986	
2400	TRAVEL	7,544	7,327	217		7,617	7,327	290	
2500	RENT	8,294	7,928	366		8,294	7,928	366	
2700	REPAIR & MAINTENANCE	3,393	1,794	1,599		3,393	1,794	1,599	
2800	OTHER EXPENSES	4,206	4,206			4,206	4,206		
	TOTAL SECOND LEVEL	47,033	39,886	7,147		43,326	36,107	7,219	
6000	GRANTS	610,000	610,000			610,000	610,000		
	TOTAL PROGRAM	825,037	831,187	-6,150		821,128	827,185	-6,057	
01100	GENERAL FUND	61,467	64,161	-2,694		59,498	62,097	-2,599	
03021	HISTORIC SITES PRESERVATION	763,570	767,026	-3,456		761,630	765,088	-3,458	
	TOTAL PROGRAM	825,037	831,187	-6,150		821,128	827,185	-6,057	

*Exhibit 10
2/10/87
K. Wolcott*

(10)

Exhibit 11
2/10/87
K. Wolcott

AGENCY: HISTORICAL SOCIETY BD OF TR LEGISLATIVE ACTION PROGRAM: ARCHIVES PROGRAM

BUDGET ITEM	FY 1986 Actual	Executive Current Level	Fiscal 1988 Difference	Executive Current Level	Fiscal 1989 Difference	FY 86-88 % Change
FTE	8.50	5.00	5.00	5.00	0.00	-0.41
Personal Services	\$251,380	\$123,918	\$120,391	\$124,155	\$3,703	-0.52
Operating Expenses	\$33,664	\$7,031	\$10,014	\$7,031	(\$2,986)	-0.70
Equipment	\$1,471	\$0	\$0	\$0	\$0	-1.00
TOTAL EXPENSES	\$286,515	\$130,949	\$130,405	\$131,186	\$717	-0.54

FUNDING	Executive Current Level	Fiscal 1988 Difference	Executive Current Level	Fiscal 1989 Difference
General Fund	\$130,949	\$544	\$131,186	\$717
State Special Rev	\$0	\$0	\$0	\$0
Federal Revenue	\$0	\$0	\$0	\$0
TOTAL FUNDING	\$130,949	\$544	\$131,186	\$717

Personal Services

1. The personal services difference results from the loss of steps in two positions which occurred while the incumbents were on a leave of absence. The difference amounts to \$3,586 in fiscal 1986 and \$3,379 in fiscal 1989.

Operating Expenses

1. The LFA includes \$3,703 in supplies for photo and reproduction supplies that should have been removed to the photo archives.

EXHIBIT
2/10/87
N. Wolcott

OFFICE OF BUDGET & PROGRAM PLANNING
EXECUTIVE BUDGET SYSTEM
AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

REPORT EBSR106
DATE : 01/07/87
TIME : 15/24/40

AGENCY : 5117 HISTORICAL SOCIETY
PROGRAM : 07 ARCHIVES PROGRAM
CONTROL : 00000

AE/OE	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
0000	FULL TIME EQUIVALENT (FTE)	5.00	5.00			5.00	5.00		
1100	SALARIES	106,511	103,291	3,220		106,529	103,146	3,383	
1400	EMPLOYEE BENEFITS	15,670	15,196	474		15,899	15,394	505	
1500	HEALTH INSURANCE	6,900	6,900			6,900	6,900		
1600	VACANCY SAVINGS	-5,163	-4,996	-167		-5,173	-4,988	-185	
	TOTAL SECOND LEVEL	123,918	120,391	3,527		124,155	120,452	3,703	
2022	SUPPLIES & MATERIALS-INFLATION		4	-4			7	-7	
2100	CONTRACTED SERVICES	610	894	-284		610	894	-284	
2200	SUPPLIES & MATERIALS	2,652	5,790	-3,138		2,652	5,790	-3,138	
2300	COMMUNICATIONS	1,891	1,899	-8		1,891	1,899	-8	
2400	TRAVEL	735	420	315		735	420	315	
2500	RENT		16	-16			16	-16	
2700	REPAIR & MAINTENANCE	704	537	167		704	537	167	
2800	OTHER EXPENSES	439	454	-15		439	454	-15	
	TOTAL SECOND LEVEL	7,031	10,014	-2,983		7,031	10,017	-2,986	
	TOTAL PROGRAM	130,949	130,405	544		131,186	130,469	717	
01100	GENERAL FUND	130,949	130,405	544		131,186	130,469	717	
	TOTAL PROGRAM	130,949	130,405	544		131,186	130,469	717	

Exhibit 13
 2/10/88
 K. W. K. H.

REPORT EBSR106
 DATE : 01/07/87
 TIME : 15/29/33

OFFICE OF BUDGET & PROGRAM PLANNING
 EXECUTIVE BUDGET SYSTEM
 AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

AGENCY : 5117 HISTORICAL SOCIETY
 PROGRAM : 07 ARCHIVES PROGRAM
 CONTROL : 70001 TRAVEL/MT. HIST. RECORDS ADV C

AE/OE	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF T FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
2100	CONTRACTED SERVICES	2,500		2,500		2,500		2,500	
	TOTAL PROGRAM	2,500		2,500		2,500		2,500	
03102	FEDERAL GRANTS	2,500		2,500		2,500		2,500	
	TOTAL PROGRAM	2,500		2,500		2,500		2,500	

MODIFIED LEVEL SERVICES ONLY

*Fy 89 Budget
2/10/87
K. Wolcott*

OFFICE OF BUDGET & PROGRAM PLANNING
EXECUTIVE BUDGET SYSTEM
AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

REPORT EBSR106
DATE : 01/07/87
TIME : 15/29/33

AGENCY : 5117 HISTORICAL SOCIETY
PROGRAM : 07 ARCHIVES PROGRAM
CONTROL : 70002 MICROFILMING

AE/OE	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF T FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
2100	CONTRACTED SERVICES	8,000		8,000		8,000		8,000	
	TOTAL PROGRAM	8,000		8,000		8,000		8,000	
01100	GENERAL FUND	8,000		8,000		8,000		8,000	
	TOTAL PROGRAM	8,000		8,000		8,000		8,000	

Exhibit 15
2/10/87
K. Wolcott

AGENCY: HISTORICAL SOCIETY BD OF TR

LEGISLATIVE ACTION

PROGRAM: PHOTO ARCHIVES

BUDGET ITEM	FY 1986 Actual	Fiscal 1988		Fiscal 1989		FY 86-88 % Change
		Executive Current Level	Difference	Executive Current Level	Difference	
FTE	0.00	3.50	0.00	3.50	0.00	ERR
Personal Services	\$0	\$87,583	\$375	\$87,623	\$375	ERR
Operating Expenses	\$0	\$12,325	\$944	\$11,625	\$242	ERR
Equipment	\$0	\$1,000	\$1,000	\$200	\$200	ERR
TOTAL EXPENSES	\$0	\$100,908	\$2,319	\$99,448	\$817	ERR
=====						
FUNDING						
General Fund	\$0	\$83,992	\$3,003	\$83,132	\$1,501	ERR
Federal Revenue	\$0	\$16,916	(\$684)	\$16,316	(\$684)	ERR
TOTAL FUNDING	\$0	\$100,908	\$2,319	\$99,448	\$817	ERR
=====						

Operating Expenses

1. The executive includes the agency's request for photocopier rent which is \$992 higher than the LFA current level.

Equipment

1. The executive includes \$1,000 of equipment in fiscal 1988 and \$200 in fiscal 1989 that are not in the LFA current level.

Exhibit 11
2/10/87
K. Wolkoff

REPORT EBSR106
 DATE : 01/07/87
 TIME : 15/24/40

OFFICE OF BUDGET & PROGRAM PLANNING
 EXECUTIVE BUDGET SYSTEM
 AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

AGENCY : 5117 HISTORICAL SOCIETY
 PROGRAM : 05 PHOTOGRAPH ARCHIVES PROGRAM
 CONTROL : 00000

AE/OE	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
0000	FULL TIME EQUIVALENT (FTE)	3.50	3.50			3.50	3.50		
1100	SALARIES	73,268	73,268			72,999	72,999		
1400	EMPLOYEE BENEFITS	12,444	12,011	433		12,755	12,321	434	
1500	HEALTH INSURANCE	5,520	5,520			5,520	5,520		
1600	VACANCY SAVINGS	-3,649	-3,591	-58		-3,651	-3,592	-59	
	TOTAL SECOND LEVEL	87,583	87,208	375		87,623	87,248	375	
2022	SUPPLIES & MATERIALS-INFLATION		2	-2			4	-4	
2100	CONTRACTED SERVICES	1,902	1,841	61		1,202	1,841	-639	
2200	SUPPLIES & MATERIALS	6,044	6,816	-772		6,044	6,816	-772	
2300	COMMUNICATIONS	1,583	1,624	-41		1,583	1,624	-41	
2400	TRAVEL	1,095	389	706		1,095	389	706	
2500	RENT	1,347	355	992		1,347	355	992	
2700	REPAIR & MAINTENANCE	137	137			137	137		
2800	OTHER EXPENSES	217	217			217	217		
	TOTAL SECOND LEVEL	12,325	11,381	944		11,625	11,383	242	
3100	EQUIPMENT	1,000		1,000		200		200	
	TOTAL PROGRAM	100,908	98,589	2,319		99,448	98,631	817	
01100	GENERAL FUND	83,992	80,989	3,003		83,132	81,631	1,501	
03024	PHOTOGRAPH PROGRAM	16,916	17,600	-684		16,316	17,000	-684	
	TOTAL PROGRAM	100,908	98,589	2,319		99,448	98,631	817	

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Exhib, T 17
2/10/87
K. Walega

AGENCY: HISTORICAL SOCIETY BD OF TR

LEGISLATIVE ACTION

PROGRAM: EDUCATION PROGRAM

BUDGET ITEM	FY 1986 Actual	Fiscal 1988		Fiscal 1989		FY 86-88 % Change
		Executive Current Level	Difference	Executive Current Level	Difference	
FTE	2.50	1.00	-1.05	2.05	-1.05	-0.18
Personal Services	\$45,308	\$32,328	(\$15,531)	\$47,859	(\$15,516)	0.06
Operating Expenses	\$20,671	\$19,875	\$117	\$19,762	\$113	-0.04
TOTAL EXPENSES	\$65,979	\$52,203	(\$15,414)	\$67,543	(\$15,403)	0.02
FUNDING						
General Fund	\$17,786	\$0	(\$14,179)	\$14,152	(\$14,152)	-0.20
Federal Revenue	\$48,193	\$52,203	(\$1,235)	\$53,391	(\$1,251)	0.11
TOTAL FUNDING	\$65,979	\$52,203	(\$15,414)	\$67,543	(\$15,403)	0.02

Personal Services

1. The LFA reduced a 0.35 FTE administrative assistant and a 0.10 tour guide while the executive deleted a 0.75 FTE administrative assistant and a 0.75 tour guide. The difference amounts to \$15,531 in fiscal 1988 and \$15,516 in fiscal 1989.

Exhibit 18
2/10/87
K. Welcott

OFFICE OF BUDGET & PROGRAM PLANNING
EXECUTIVE BUDGET SYSTEM
AGENCY/PROGRAM/CONTROL --- BUDGET WORKSHEET

REPORT EBSR106
DATE : 01/07/87
TIME : 15/24/40

AGENCY : 5117 HISTORICAL SOCIETY
PROGRAM : 08 EDUCATION PROGRAM
CONTROL : 00000

AE/OE	DESCRIPTION	OBPP FY 88	LFA FY 88	DIFF FY 88	SUB-CMT FY 88	OBPP FY 89	LFA FY 89	DIFF FY 89	SUB-CMT FY 89
0000	FULL TIME EQUIVALENT (FTE)	1.00	2.05	-1.05	---	1.00	2.05	-1.05	---
1100	SALARIES	28,161	41,722	-13,561	---	28,054	41,574	-13,520	---
1400	EMPLOYEE BENEFITS	4,133	5,280	-1,147	---	4,175	5,346	-1,171	---
1500	HEALTH INSURANCE	1,380	2,829	-1,449	---	1,380	2,829	-1,449	---
1600	VACANCY SAVINGS	-1,346	-1,972	626	---	-1,344	-1,968	624	---
	TOTAL SECOND LEVEL	32,328	47,859	-15,531	---	32,265	47,781	-15,516	---
2022	SUPPLIES & MATERIALS-INFLATION		6	-6	---		10	-10	---
2100	CONTRACTED SERVICES	11,637	11,814	-177	---	11,637	11,814	-177	---
2200	SUPPLIES & MATERIALS	967	1,075	-108	---	967	1,075	-108	---
2300	COMMUNICATIONS	2,585	2,727	-142	---	2,585	2,727	-142	---
2400	TRAVEL	2,547	1,992	555	---	2,547	1,992	555	---
2500	RENT	202	156	46	---	202	156	46	---
2700	REPAIR & MAINTENANCE	451	431	20	---	451	431	20	---
2800	OTHER EXPENSES	1,486	1,557	-71	---	1,486	1,557	-71	---
	TOTAL SECOND LEVEL	19,875	19,758	117	---	19,875	19,762	113	---
	TOTAL PROGRAM	52,203	67,617	-15,414	---	52,140	67,543	-15,403	---
01100	GENERAL FUND		14,179	-14,179	---		14,152	-14,152	---
03020	MT HIST. SOCIETY DONATIONS	47,203	48,438	-1,235	---	47,140	48,391	-1,251	---
03102	FEDERAL GRANTS	5,000	5,000	---	---	5,000	5,000	---	---
	TOTAL PROGRAM	52,203	67,617	-15,414	---	52,140	67,543	-15,403	---

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to be filled out by a person testifying or a person who would not like to stand up and speak but wants their testimony entered into the record.

WITNESS STATEMENT

NAME Clark Byrk BUDGET Historical Society

ADDRESS Box 752 East Helena, MT 59635

WHOM DO YOU REPRESENT? Self + Helena C of Com

SUPPORT Yes OPPOSE _____ AMEND _____

COMMENTS: _____

We recognize what a tremendous asset the Museum & Society is to Montana and therefore to Helena.

The tour train + volunteer guide program are demonstrations of Helena's support.

PLEASE LEAVE PREPARED STATEMENT WITH SECRETARY.

