

MEMORANDUM

TO: Health and Human Services Committee

FROM: Justina J. Ferber, ~~Legislative Analyst~~

SUBJECT: **Worksession:** FY17 Operating Budget
 Non-Departmental Account-Montgomery County Historical Society

Those expected to attend this worksession:

- Matthew Logan, Executive Director, Montgomery County Historical Society
- Jennifer Bryant, Management and Budget Specialist, OMB

Budget Overview

For FY17, the Executive has recommended level funding of \$77,250 for the Montgomery County Historical Society (MCHS), which is included in the Historical Activities NDA (©1). The following table provides a County funding history for MCHS.

MC Historical Society	FY13 Approved	FY14 Approved	FY15 Approved	FY16 Approved	FY17 Recommended	% Change FY16 to FY17
Total Gen Fund Expenditures	\$32,250	\$77,250	\$77,250	\$77,250	\$77,250	0.0%

The MCHS reports that the Executive's recommended FY17 funding would be allocated as reflected below. The MCHS revised the budget distribution for FY17 to better reflect its priorities and spending, see ©2.

Librarian	\$7,500
Archivist	\$7,500
Collections Manager	\$17,000
Education and Outreach Coordinator	\$15,000
Executive Director	\$20,000
<u>Utilities/Telephone/Supplies</u>	<u>\$10,250</u>
Total	\$77,250

In the MCHS's FY17 funding letter, Executive Director Matthew Logan requests \$77,250 in support of historical services that benefit Montgomery County and its citizens. Mr. Logan states that County funding would support educational programs for children and adults; provide history and heritage outreach programs throughout the County; provide research and historical resources to the public through the Jane Sween Library and Archives and the Montgomery County Archives; support Montgomery County History Day and the Montgomery County History Conference; and operate the Beall-Dawson House Museum and the Stonestreet Museum of 19th Century Medicine.

Information on the MCHS's proposed FY17 budget is attached at ©2-5. The proposed funding is approximately 20% of the anticipated FY17 funding for the organization. A description of FY15 accomplishments is at ©6-9. It includes events like History Day and the organization's annual History Conference, public programs, the Speakers Bureau, and exhibits. The Historical Society adopted a new strategic plan in April 2015.

Council staff recommends approval of the FY17 Historical Activities NDA for \$77,250.

This packet contains:

	<u>Circle #</u>
Historical Activities NDA	1
MCHS Revised Budget Distribution	2
MCHS Proposed FY17 Budget	3
MCHS Description of FY15 Accomplishments	6

Historical Activities

This NDA contains a General Fund appropriation of \$77,250 and provides funding for the following agencies and programs:

- **Historic Preservation Commission:** The Historic Preservation Commission's main responsibility is to administer the historic preservation ordinance including recommending Montgomery County sites of potential historical significance. These efforts are administered by the Maryland-National Capital Park and Planning Commission (M-NCPPC). Starting in FY14, funding to support the Commission is no longer budgeted in this NDA but is appropriated to the M-NCPPC.
- **Historical Society:** Funding for the Montgomery County Historical Society provides support for the Society's Education Program staff, educational and outreach programs for County residents, and to maintain the Historical Society's research library and museums.

FY17 Recommended Changes	Expenditures	FTEs
FY16 Approved	77,250	0.00
FY17 Recommended	77,250	0.00

Homeowner's Association Road Maintenance Reimburse

This NDA provides a partial reimbursement to homeowners' associations (HOAs) for their maintenance of certain privately-owned roadways. The payment is currently restricted to through roadways, accessible to the public, which are one-quarter mile or longer and which provide vehicular access to more than four dwelling units. In FY97, an Executive Regulation was enacted allowing homeowners' associations to request that their roadways be deemed "private maintenance roads." This designation qualifies the HOAs for State reimbursement of their roadway maintenance costs. The County annually submits to the State its estimate of reimbursable miles, including those accepted as private maintenance roads. The State then reimburses the County and, subsequently, the County forwards the funds to HOAs.

FY17 Recommended Changes	Expenditures	FTEs
FY16 Approved	59,070	0.00
FY17 Recommended	59,070	0.00

Housing Opportunities Commission

The Housing Opportunities Commission of Montgomery County (HOC) is a public body corporate and politic duly organized under Division II of the Housing Community Development Article of the Annotated Code of Maryland, as amended, known as the Housing Authorities Law. As such, the Commission acts as a builder, developer, financier, owner, and manager of housing for people of low- and moderate- (eligible) income. The Commission also provides eligible families and individuals with affordable housing and supportive services.

FY17 Recommended Changes	Expenditures	FTEs
FY16 Approved	6,401,408	0.00
Increase Cost: Annualization of Personnel Costs	219,660	0.00
Increase Cost: Rental Licenses Fee Adjustment	20,000	0.00
Decrease Cost: Operating Expenses	(128,028)	0.00
FY17 Recommended	6,513,040	0.00

Inauguration & Transition

The Montgomery County Charter provides for the quadrennial election of a County Executive and County Council. This NDA provides for a ceremony and smooth transition of the County Executive and County Council every four years.

FY17 Recommended Changes	Expenditures	FTEs
FY16 Approved	0	0.00
FY17 Recommended	0	0.00

	FY16	FY17
Montgomery County Historical Society	Budget	Proposed Budget
Executive Director	15,300	20,000
Librarian	10,200	7,500
Education and Outreach Coordinator	15,300	15,000
Collections Manager	15,300	17,000
Archivist	15,300	7,500
Utilities/Telephone/Supplies	5,850	10,250
TOTAL	77,250	77,250



November 12, 2015

Timothy Goetzinger, Budget and Finance Manager
 Department of Housing and Community Development
 100 Maryland Avenue, 4th Floor
 Rockville, Maryland 20850

Dear Mr. ^{Tim}Goetzinger,

The Montgomery County Historical Society (MCHS) respectfully requests \$77,250 for FY17 in support of historical services that benefit Montgomery County and its citizens. Funding from the County will help Montgomery History to:

- support educational programs for children and adults throughout the County
- provide history and heritage outreach programs throughout the County
- provide research and historical resources to the public through the Jane Sween Library and Archives, and the Montgomery County Archives
- support Montgomery County History Day and the Montgomery County History Conference
- operate the Beall-Dawson House Museum and the Stonestreet Museum of 19th Century Medicine

Montgomery History adopted a new strategic plan in April 2015 and refined its mission at that time to reflect its desire to be more inclusive and accessible. Our new mission is to collect, preserve, interpret, and share the histories of all of Montgomery County's citizens. As the only organization addressing the entire scope of County history, Montgomery History serves a unique role in creating a shared sense of place, a critical element to building a diverse and welcoming community for our changing population.

The Society requests a funding appropriation of \$77,250, allocated for:

		<i>FY17</i>
Education and Outreach	15,300	<i>15,000</i>
Collections Manager	15,300	<i>17,000</i>
Librarian	10,200	<i>7,500</i>
Archivist	15,300	<i>7,500</i>
Executive Director	15,300	<i>20,000</i>
Supplies/Utilities	5,850	<i>10,250</i>
TOTAL	\$77,250	

1. The Education and Outreach grant of ~~\$15,300~~ ^{*15,000*} partially pays the salary of the Education Coordinator who oversees education and outreach programs designed to encourage all County residents—from preschool to senior citizen—to more actively

appreciate County history. Programs include exhibits, lectures, workshops, tours, Speakers Bureau presentations, docent training, museum activities, Scout programs, and more. Montgomery History manages all aspects of the popular annual Montgomery County History Day for hundreds of middle and high school students supporting the National History Day event. These funds will also allow Montgomery History to organize the increasingly successful Montgomery County History Conference, which benefits the dozens of small historical organizations and sites in the County by providing volunteer and staff development, training, and networking opportunities.

2. ^{17,000} ~~Funding of \$15,300~~ for Collections will allow Montgomery History to continue to care for and manage its invaluable 10,000-piece collection of artifacts from all eras of the County's history. These funds will partially pay the salary of our Collections Manager who is addressing a number of pressing concerns related to the storage of our artifacts including improving environmental controls, security, and other factors that could negatively impact the objects. In addition, Montgomery History is planning to make the items in its collection more accessible to the people of the county by putting its collections database online. Doing so will allow researchers, students, museum professionals, and the curious to see into the county's past. In addition, this funding will help us to develop popular programs such as the traveling "pop-up" exhibition of 19th and 20th century typewriters.
3. ^{7,500 each} ~~The Library and Archives portion of \$25,500~~ will partially support the salary of a staff librarian at the Jane Sween Research Library and a part-time archivist to continue processing important County records at the newly re-opened Montgomery County Archives. The Sween Library houses the papers, maps, photographs, documents, and records that span the county's history from the 18th century onward. It is heavily used by researchers, genealogists, journalists, policymakers, and countless others. The County Archives, immediately adjacent to the County Records Center, is open 10 hours/week and by appointment. The archivist and select volunteers process the backlog of materials and accept limited amounts of new material for inclusion in the Archives.
4. ^{20,000} ~~The Executive Director appropriation, \$15,300~~; partially pays the salary of the executive director who oversees and coordinates all aspects of Montgomery History's operation. As there has been significant turnover in this position and in other key staff positions over the years, the work of the executive director has become even more important of late. It includes staff recruitment and training, Board development, fundraising, facility management, partnership development, public relations/rebranding, and strategic oversight of programs and operations.
5. ^{10,250} ~~The \$5,350~~ for Supplies/Utilities helps to provide some of the basic tools of the museum and archival trades including storage materials, acid-free paper, shelving, cleaning equipment, and other supplies. These funds also help to defray the significant utility expenses of the properties Montgomery History owns and operates.

Thank you so much for your careful consideration of this request. As an organization that is reestablishing its footing after years of instability, these funds are of special importance. It signals to other potential funders that County leaders understand and appreciate the unique value of capturing and celebrating the past as a way to understand the future, and that history is an investment worth making. The controversy surrounding the Confederate soldier statue has reinforced this notion that we ignore the past at our own peril. Our history is, above all, relevant and alive.

Please contact me if you have any questions or thoughts regarding this very important request. Thank you, again, for your support.

Sincerely yours,



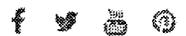
Matthew Logan
Executive Director

cc: Isiah Leggett, County Executive
George Leventhal, Vice President, County Council, HHS Committee Chair
Craig Rice, President, Montgomery County Council
Phil Andrews, Montgomery County Council
Roger Berliner, Montgomery County Council
Cherri Branson, Montgomery County Council
Marc Elrich, Montgomery County Council
Nancy Floreen, Montgomery County Council
Nancy Navarro, Montgomery County Council
Hans Riemer, Montgomery County Council

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MoCo HISTORY

Accomplishments

FY15 Accomplishments

July 1, 2014 to June 30, 2015

NEW LEADERSHIP

The summer of 2014 saw significant turnover on the staff of the Society. While big transitions can be difficult, the organization assembled a new team that brought energy and urgency to the Society's work. Matthew Logan was hired in November as Executive Director, Amanda Elliott began in January as Education and Outreach Coordinator, and Elizabeth Lay joined the organization as Collections Manager in March. In addition, Laura Riese began as Office and Museum Shop Manager in May.

NEW STRATEGIC PLAN

The Society's Board of Directors adopted a new strategic plan on April 1, 2015 that identifies six primary goals:

1. Embrace our role as the countywide historical organization;
2. Increase the awareness and accessibility of our work;
3. Utilize technology to document, preserve, and make accessible our programs and the items in our library, archive, and museum collections;
4. Explore options for new or expanded facilities to meet our current and future needs;
5. Maximize our revenue streams; and
6. Create strong and sustainable governance, financial, HR, and administrative systems to facilitate future growth.

This plan is designed to stabilize the organization, make its work more widely accessible, and position it for future growth.

ACCESS: HISTORY

In 2015, the Society is launching a new initiative—Access: History—to better secure the future of its priceless artifact and library collections. Our goal is to bring these collections to life for students, researchers, visitors, and the over one million people who call Montgomery County home. This effort will involve a comprehensive assessment of our collections and our facilities, professional conservation and digitization of prioritized collections, and the development of exciting and innovative events, programs, and online tools to make the objects more accessible and meaningful to our stakeholders.

HISTORY CONFERENCE

In spite of threatening weather, our annual History Conference on January 24, 2015 attracted over 150 people and featured presentations with a mix of scholarly merit and popular appeal. Session

topics included Maryland Emancipation Day, an archeological study of Josiah Henson's former home, a history of Laytonsville, and a look at the one- and two-room schoolhouses in the county.

HISTORY DAY

The Montgomery County History Day competition, held on March 14, 2015 at Richard Montgomery High School, was a great success for the county's young people. Final numbers: 200 students (up from 130 in 2014), 16 schools, 23 teachers, 125 entries, and 60 volunteer judges. Fifty-five students represented Montgomery County at the State competition at UMBC on May 2. Of these, 15 students from Montgomery County advanced to the National History Day competition at the University of Maryland, College Park in June. We are very pleased to report that four Montgomery County students won special prizes and acknowledgements at the National level.

SPEAKERS BUREAU

The Bureau's cadre of 26 historians and authors was quite busy during FY15, offering 133 programs, presentations, portrayals, and reenactments to an estimated audience of 4,300. In FY15 we added two exciting new programs to our menu of speakers: Laytonsville: From Crossroads to Community and Capital Splendor-Gardens and Parks of Washington DC (Including Montgomery County).

A promising new endeavor is the partnership between the Speakers Bureau and the Montgomery College Lifelong Learning Institute. During FY15, we offered five multi-session classes at Montgomery College: Rockville history (including a guided walking tour); Montgomery County, and women, in the Civil War; and classes on the history of towns and places in Montgomery County. This partnership is continuing in FY16, with three multi-session classes scheduled for this fall.

PUBLIC EVENTS

150th Commemoration of the Battle of Fort Stevens

On July 12, 2014, MCHS participated in this National Park Service event at the Fort Stevens historic site. MCHS set up its Civil War era tent and partnered with other re-enactors to offer a day-long program of battlefield medical and surgical care.

Happy Birthday, Montgomery County!

On Saturday, September 6, 2014, the Society celebrated the 238th birthday of the county's founding at the Beall-Dawson House with a day of crafts, games, and, of course, the cutting of the birthday cake.

Ghost Story Night

On October 29, MCHS hosted a crowd-pleasing Ghost Story Night in the Beall-Dawson House. It was a fun family activity with re-enactors and storytellers sharing ghost stories based on actual historic people and events in Montgomery County.

Maryland Emancipation Day

On November 1, 2015, 150 years to the day that Maryland freed all slaves within its borders, MCHS commemorated the occasion at our Rockville campus with musical performances, period reenactments, and story-telling. President Lincoln spent the afternoon with the visitors and made several speeches about slavery and congratulating the people of Maryland on their support of emancipation.

Heritage Days

On June 27 and 28, we participated in Montgomery County's free Heritage Day event and celebrated the 200th anniversary of the Beall-Dawson House. Volunteers led special tours, the Genealogy Club

held a book sale, Clarence Hickey was on hand as Dr. Stonestreet discussing Civil War-era medicine, and we had other hands on demonstrations and special activities for children. The weekend also marked the launch of our first ever pop-up exhibit, Tap Into History: A Century of Typewriters. The "please touch" exhibit showcased typewriters from the 1880's to the 1980's, inviting visitors to type their own message on a postcard. The day brought in close to 100 visitors!

Misc. Events

MCHS participated in other local county events in FY15:

- Montgomery County Agricultural Fair during August 8-17, 2014
- Montgomery County Annual Farm Tour at Red Wiggler CSA, Clarksburg, July 26, 2014
- Annual Waterford Fair, Waterford, VA, October 4-5, 2014
- National Museum of Civil War Medicine, Frederick, Annual Night at the Museum program, December 13, 2014

EXHIBITS

"Montgomery Maternity: Pregnancy, Childbirth, and Infant Care at the Turn of the 20th Century"
September 2013 through May 2015, Stonestreet Museum of 19th Century Medicine

"Let Your Voice Be Heard!: Civic Activism in Montgomery County"
July 2014 through June 2015, Beall-Dawson House

"A Walk Down the Aisle: Bridal Gown Retrospective"
February 5-26, 2015, Helz Music Room at Kentlands Mansion

"Tap into History: a Century of Typewriters" (A "pop-up exhibit" that invites attendees to use manual typewriters from our collection for a "please touch" experience.)
June 27, 2015, Heritage Days, Beall-Dawson House
June 28, 2015, Bethesda Big Train game, Cabin John Regional Park
Scheduling continues in locations throughout the County.

"Dr. Stonestreet: A 19th Century Country Doctor"
June 18, 2015 through September 2015, Stonestreet Museum of 19th Century Medicine

LIBRARY

The Jane C. Sween Research Library received 340 visitors who are now able to utilize a plethora of new primary sources. Among the new acquisitions are:

- The ledger kept by Dr. Samuel Lukens which tracked the patients he saw, their conditions, and his fees from 1805-1807
- Collection of 40 genealogy and local history books from Mary Gordon Malloy
- 1960 Program of Events from the Rockville Centennial
- A history of "Leisure World at 45" by Fred Shapiro
- Several old maps including of the Rockville West End, 1889-1890 and the Street Map of Rockville 1959
- Original diploma from Andrew Small Academy 1897/8, and an original diploma from Briarly Hall Seminary 1904 for Mabel Ward Webb
- 1917 Burpee Seed Catalogue, and Gardening Guide published by Potomac Almanac

The Library worked with OCI, a company in Oklahoma, to have its entire yearbook collection—over 200 annuals in all—digitally scanned and preserved. The goal is to make the information searchable and therefore accessible to future generations.

COUNTY ARCHIVES RE-OPENING

2014 was an exciting year for the Montgomery County Archives. The move into the new space took place on July 29 and three high school students provided 84 hours of SSL service during August to shelve approximately 1,000 cubic feet of record boxes, update finding aids to reflect the materials' new locations, unpack supplies and equipment, and assist in setting up computers and electronic equipment.

The Archives opened to researchers on October 7 and the grand opening was held on October 22. It is now open to the public 10 hours weekly (Tuesday from 10-4 and Thursday from 12-4) and by appointment. To date there has been 1 record loan, 18 researcher visits, 22 telephone calls, 8 emails, and 35 volunteer hours (not including SSL). Researchers have been interested in a variety of topics including Montgomery Village, school and library buildings, early courthouses, early County Council photographs, police cadets, housing, low income housing, League of Women Voters records, the county charter movement and aerial photographs.

A joint meeting with DGS and MCHS to begin the process of identifying and transferring records from the Records Center and County departments was held in February 2015. A memo that will be sent to each of the departments, with a reminder that the Archives is open and a description of which records are appropriate to be transferred to the Archives, has been drafted and is awaiting county approvals.

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