

MEMORANDUM

April 17, 2014

TO: Health and Human Services Committee

FROM: Vivian Yao, Legislative Analyst *vy*

SUBJECT: **Worksession: FY15 Operating Budget**
Non-Departmental Account-Montgomery County Historical Society

Those expected for this worksession include:

- Thomas Kuehhas, Executive Director, Montgomery County Historical Society
- Jennifer Bryant, Office of Management and Budget

In addition, representatives from the Department of General Services (DGS) are expected to be available to answer questions related to the build-out of space at the Montgomery County Records Center to house the Montgomery County Archives.

Budget Overview

For FY15, 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 six-year County funding history for MCHS.

	FY10 Approved	FY11 Approved	FY12 Approved	FY13 Approved	FY14 Approved	FY5 Rec	% Change FY14-FY15
Expenditures							
General Fund	\$64,500	\$32,250	\$32,250	\$32,250	\$77,250	\$77,250	0.0%
TOTAL Expenditures	\$64,500	\$32,250	\$32,250	\$32,250	\$77,250	\$77,250	0.0%

MCHS reports that the Executive's recommended FY15 funding would be allocated as follows:

Education and Outreach	\$19,000
Librarian	\$10,000
Archivist	\$36,000
Executive Director	\$12,250
TOTAL	\$77,250

In his FY15 funding request (©2-4), Director Kuehhas explained that efforts of MCHS "remain focused on a core educational mission encompassing collecting, preserving, and interpreting the history of Montgomery County." 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 promote development efforts by providing funding matches.

Information on MCHS's FY14 budget is attached at ©5. The organization has been recommended for level funding in FY15, and Director Kuehhas anticipates that the budget for FY15 will be in line with the organization's FY14 budget. He notes; however, that funding for maintaining the County Archives will be reflected in the organization's FY15 budget, and that the organization will be instituting new fundraising initiatives in 2014-2015 that may also impact available resources for the organization.

MCHS has provided an update on FY13 programming at ©8-12. The update highlights the following programs and efforts: Partnership Building, Montgomery County History Conference, MCHS Speakers Bureau, Library and Research, New Interpretive Programs in MCHS Museums, Current Exhibits, Collections Blog, Outreach Programs, Montgomery County History Day, Center for Suburban Studies, and Tours. A calendar of 2014 activities is attached at ©13.

Montgomery County Archives Update

The Council approved FY14 funding of \$140,000 to operate the Montgomery County Archives. The budget included \$95,000 in DGS to build a climate-controlled facility within the Records Center to house the Montgomery County Archives, and \$45,000 to hire a part-time archivist and support other expenses related Archives management.

DGS reports that construction at the Records Center should be completed by the middle of June. Work completed in preparation of housing the Archives has included moving 10,000 boxes at the Records Center and installing new shelving to make room for the new MCHS climate-controlled office. Currently, the Montgomery County Archives are being housed at the Broome School temporarily. DGS representatives have met with MCHS Director Kuehhas to discuss the progress of the new facility and visit the archives at the Broome School.

MCHS reports that it is in the process of planning the move of the Archives from the Broome School to the Records Center, currently anticipated for mid-June. MCHS anticipates that it will take several months to set up the Archives before it will be available to the public. In addition, MCHS will be working with DGS to formalize a process for reviewing County Government records for historical significance before they are destroyed. **The Committee may want to schedule a status update on these efforts related to the Montgomery County Archives in the Fall.**

FY15 Recommended Changes	Expenditures	FTEs
FY14 Approved	28,020	0.00
FY15 CE Recommended	28,020	0.00

Group Insurance for Retirees

Group insurance is provided to an estimated 5,098 retired County employees and survivors, as well as retirees of participating outside agencies. Employees hired before January 1, 1987, are eligible upon retirement to pay 20 percent of the premium for health and life insurance for the same number of years (after retirement) that they were eligible to participate in the group insurance plan as an active employee. The County government pays the remaining 80 percent of the premium. Thereafter, these retirees pay 100 percent of the premium. Employees hired before January 1, 1987, are also offered the option at retirement to convert from the 20/80 arrangement to a lifetime cost sharing option.

Employees hired after January 1, 1987, are eligible upon retirement for a lifetime cost sharing option under which the County pays 70 percent of the premium and the retiree pays 30 percent of the premium for life for retirees who were eligible to participate in the County group insurance plan for 15 or more years as active employees. Minimum participation eligibility of five years as an active employee is necessary to be eligible for the lifetime plan. The County will pay 50 percent of the premium for retirees with five years of participation as an active employee. The County contribution to the payment of the premium increases by two percent for each additional year of participation up to the 70 percent maximum.

On March 5, 2002, the County Council approved a one-time opportunity for retirees still under the 20/80 arrangement with an expiration date to elect the lifetime cost sharing arrangement. The new percentage paid by the County for those electing this arrangement ranges from 50 percent to 68 percent, depending upon years of active eligibility under the plan and years since retirement. The cost sharing election process has been completed.

The budget does not include employer contributions from participating outside agencies.

FY15 Recommended Changes	Expenditures	FTEs
FY14 Approved	32,462,450	0.00
FY15 CE Recommended	32,462,450	0.00

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.

FY15 Recommended Changes	Expenditures	FTEs
FY14 Approved	77,250	0.00
FY15 CE Recommended	77,250	0.00

Homeowners' 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.



MCHS

MONTGOMERY
C O U N T Y
H I S T O R I C A L
S O C I E T Y

October 28, 2013

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

Dear Mr. Goetzinger,

The Montgomery County Historical Society (MCHS) requests \$77,250 for FY15 in support of historical services that benefit Montgomery County and its citizens. Funding from the County helps to:

- 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
- promote development efforts by providing funding matches

Efforts of the Montgomery County Historical Society remain focused on a core educational mission encompassing collecting, preserving, and interpreting the history of Montgomery County. As the only organization addressing the entire scope of County history, MCHS serves a unique role in creating a shared sense of place, a critical element to building and maintaining community. We *are* the County's historical society!

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

Education and Outreach	\$19,000
Librarian	\$10,000
Archivist	\$36,000
Executive Director	\$12,250
TOTAL	\$77,250

1. **The Education grant of \$10,000** 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, speaker's

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bureau presentations, docent training, museum activities, school programs, and more. The Montgomery County Historical Society 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. Participants present history projects in school level competitions; winners progress to the County level competition, then state and finally national competition.

2. **The Outreach portion of funding for \$9,000** creates a source of funding to assist individuals and organizations throughout the County that conduct programs and collect critical historical capital to benefit their local communities. These groups typically function with little or no staffing and few resources. They benefit from the annual Montgomery County History Conference, a professional development opportunity for the general public as well as all County history and heritage groups, and from other shared opportunities for these groups to grow and thrive.
3. **The Library and Archives \$36,000** will partially support the salary of a staff librarian and allow the Society to re-establish a part-time position for a staff Archivist to continue processing of important County records. The question of the disposition of the Montgomery County Archives has been settled for now with the planned move to space within the County Records Center. The request for the County Archives will be used as it was this past year for a part time archivist who is able to open the County Archives by appointment, work with volunteers as they begin processing the backlog of materials and accept limited amounts of new material for inclusion in the Archives. We are pleased that this is giving MCHS the ability to begin processing county papers and become good stewards of the Archives. In addition, this funding provides partial support for storage of our artifact collection on the County's heritage, which includes two-dimensional papers and images as well as large three-dimensional items.
4. **The Executive Director appropriation, \$12,250**, partially pays the salary of the Executive Director who oversees and coordinates MCHS events, education programs and exhibitions in our two museums, research library, publications, website, Speakers' Bureau; and special projects, such as the County Archives. The Society intends to continue its historical research and projects to inform and educate the public of the unique and vibrant history of Montgomery County. MCHS plans, as specified in the FY11-14 Strategic Plan, to create exhibits and programs to provide broader perspective on County history and its impact on today's residents. This category also supports expenses related to public access to the Rockville headquarters home to the Beall-Dawson Historic Park and the Stonestreet Museum of 19th Century Medicine.

History provides a foundation on which we build our lives. The long and beneficial relationship between the Montgomery County Historical Society and Montgomery County government demonstrates a public-private partnership that is practical in both fiscal and philosophical terms.

County funding support indicates an appreciation for the important work of the Montgomery County Historical Society to create a sense of community through outreach, the operation of the library and archives, the increasing scope of our education and school programs, and the growing quality of the collection, which shows in a tangible way, our growth and maturity as a County. As MCHS actively collects, preserves, interprets, and promotes the history of Montgomery County for all County residents, we trust the County will continue its commitment by meeting our total funding request of \$77,250.

Sincerely yours,

Thomas A. Kuehhas
Executive Director

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

Yao, Vivian

From: Kuehhas, Tom [tkuehhas@montgomeryhistory.org]
Sent: Wednesday, April 16, 2014 11:21 AM
To: Yao, Vivian
Subject: Re: MCHS Budget info

Hi Vivian,

Thanks for pointing out the discrepancy.
I took the headings from our audit last year, which included the endowment, so that was my mistake.
We usually are able to withdraw \$99K from the endowment, so this should reconcile now.

MCHS FY14 Budget

	FY14
Library & Education Services	\$12,500
Shop Sales	\$25,000
Programs	\$10,500
Donations	\$60,000
Grants	\$115,000
Membership Dues	\$26,000
Other Revenue	\$33,000
Investment	\$14,000 (projected)
Income	\$296,000 (projected)

Expense:

	FY14 (projected)
Program Services	
Program Educational Activity	\$105,000
Collections, publications, and museum activities	\$ 95,000
Library & Archive Services	\$ 70,000
Museum Shop	\$ 20,000
Supporting Services	
Management and general	\$ 75,000
Fundraising	\$ 30,000
Total Expenses	\$395,000 (projected)

Best,
Tom
Thomas A. Kuehhas, Executive Director
Montgomery County Historical Society
111 West Montgomery Avenue
Rockville, MD 20850

The breakdown of how the Society plans to use the recommended \$77, 250 is as follows:

Education and Outreach	\$19,000
Librarian	\$10,000
Archivist	\$36,000
Executive Director	\$12,250

TOTAL \$77,250

1. **The Education grant of \$10,000** 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, speaker's bureau presentations, docent training, museum activities, school programs, and more. The Montgomery County Historical Society 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. Participants present history projects in school level competitions; winners progress to the County level competition, then state and finally national competition.
2. **The Outreach portion of funding for \$9,000** creates a source of funding to assist individuals and organizations throughout the County that conduct programs and collect critical historical capital to benefit their local communities. These groups typically function with little or no staffing and few resources. They benefit from the annual Montgomery County History Conference, a professional development opportunity for the general public as well as all County history and heritage groups, and from other shared opportunities for these groups to grow and thrive.
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I hope I've been able to provide all the information you need.
Please let me know if you require anything further.
Thanks Vivian!

Best,
Tom
Thomas A. Kuehhas, Executive Director
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The Montgomery County Historical Society
FY 2013

Founded in 1944, the Montgomery County Historical Society (MCHS) evolved from an all-volunteer organization with no permanent facilities to a venerated institution that attracts scholars, volunteers, professionals, and participants of all ages and walks of life. Today the historic resources of the Society include the c. 1815 Beall-Dawson House, the Stonestreet Museum of 19th Century Medicine, and the Jane C. Sween Research Library, each building used for programs and exhibits and to house important collections related to Montgomery County. Artifacts date from prehistory to the present, and the Library maintains extensive collections of photographs, books, manuscripts, maps, newspapers, and other materials that are indispensable to understanding County history.

The Board of Directors approved a Strategic Plan in September 2010, outlining steps to establish planning, financial, and marketing strategies through FY14. MCHS seeks to take advantage of outstanding professional staff and resources to anchor its position in the metropolitan area and to focus on creating and improving strategic partnerships. This will generate outreach opportunities such as the Harper Center for Suburban Studies, traveling exhibits, shared resources and audiences. The Strategic Plan's vision statement refers to a "shared local history and sense of place" that would "reflect the diversity of the county's population through its collection, presentation of exhibits and educational programs, and the acquisition and maintenance of accessible resources intended to create, strengthen, and inspire the community."

Although the Montgomery County Historical Society still faces fiscal and resource challenges, the organization is poised to continue as a vital, stable heritage presence in the current environment and to improve its visibility throughout Montgomery County.

2013 Programs

- **Building Partnerships with Other Organizations**

MCHS Executive Director Thomas A. Kuehas has focused on building partnerships with other County history and heritage organizations. Co-hosting a lecture on Rachel Carson and Silent Spring by Carson biographer Dr. Linda Lear at Asbury Methodist Village in Gaithersburg was one such example. A more ambitious one was co-hosting the "Civil War Comes to Rockville" Heritage Days event along with Heritage Montgomery, Peerless Rockville, the City of Rockville, and the Washington Revels, all of whom joined together to stage this free event and provide a full slate of programs appealing to those interested in Civil War history, as well as families looking for a fun way to spend the day. Activities took place at multiple venues in Rockville – the Beall-Dawson Park, the Red Brick Courthouse, Christ Episcopal Church and Rockville Town Center. Attendees met re-enactors, participated in games and crafts of the period, and enjoyed musical performances, lectures, and a community dance at the end of the day.

- Montgomery County History Conference**
 This all-day event was presented by MCHS for the 7th year in January 2013, at the Shady Grove campus of Johns Hopkins University in Rockville. The Conference has gained momentum each year in raising interest and providing training and in-service opportunities for volunteers and staff of County heritage and history organizations. In 2013, topics included the keynote session on the History of Science and Technology in Montgomery County; Desegregating Montgomery County Public Schools; Memorializing the Civil War in Montgomery County; History for Kids; A Tangled Web: Researching the Enslaved in Montgomery County; Archaeology in Clarksburg, Maryland; and Women Who Dared. The closing session featured a rousing, interactive theatrical program on the War of 1812, including local events. Each year the caliber of sessions and speakers is improved to reflect the on-going commitment of MCHS to serving its volunteers, constituents and collegial organizations.
- Speakers Bureau**
 The MCHS Speakers Bureau has been serving the wider community for several years, and its popularity is growing. Volunteer coordinator Clarence Hickey continues to upgrade the quality, diversity, and efficiency of the program. As a service to the community, a variety of volunteer speakers travel to about 135 public and private venues each year. Currently, there are 25 speakers offering more than 60 topics related to local, regional, and national history. Each year, new topics and speakers are added, including reenactments and portrayals, lectures, music, and slide shows. Audiences recently have topped 4,700 people per year. Community service-related organizations have been the most frequently visited, with more than 72% of the total requests for speaker programs. The Speakers Bureau also has reached across the generational lines to families during the many public events in which we have participated. We are privileged to be able to take history into our community.
- Library and Research**
 In conjunction with programs that encourage research such as the Center for Suburban Studies and the efforts of the Genealogy Club, the use of the unique Montgomery County Historical Society library continues to grow. Access to the collections continues to improve through digitization efforts, with the ambitious goal of creating online access to historic resources.
- New Interpretive Programs in Montgomery County Historical Society Museums**
 The reinterpretation of the *Stonestreet Museum of 19th Century Medicine* provides an authentic and meaningful experience through the use of original objects. It focuses on interpreting the impact of 19th century medicine on medical care today. Medical instruments, medications and equipment are described with details of their use or application in medical treatments at the time, with additional information related to modern day treatment. This reinterpretation allows self-guided visits in addition to traditional docent interpretation, while also allowing space for changing exhibits related to 19th and early 20th Century medicine.

A new program, "Seen but Not Heard: A Tour from the Perspective of the Help," was added to the tours available to visitors. MCHS has well-documented information on not only who worked at the Beall-Dawson house as an enslaved person or servant but their

names and duties as well. Drawing from this information the tour takes visitors through the home as if they are servants of the BD house. They enter through the house as a servant would and are told the story as a servant would have seen it unfold. It provides the visitor with another perspective of who lived in the house and also provides more information on African American history in Montgomery County. Staff and volunteers continue to evaluate other ways in which the museum spaces can be used more efficiently and effectively to tell the broader County story.

The two museums serve as the focal points of the "Changes" educational program, which is tailored to the local and American history curricula of the Montgomery County Public Schools. The "Visit From the Past" program brings a hands-on educational opportunity into Pre-K and Kindergarten classrooms. MCHS is examining ways to bring even more programs into the schools.

Current Exhibits:

- "This is the Way We Wash Our Clothes"
Beall-Dawson House
Tools, clothing, photographs, documents, and even a dry-cleaner's log book from Bethesda illustrate changes in the way laundry has been done, from the 18th century to the present, and the role this chore has played in the household.
- "Montgomery Maternity: Pregnancy, Childbirth and Infant Care at the Turn of the 20th Century"
Stonestreet Museum of 19th Century Medicine
Our new exhibit takes a look at what's changed (and what hasn't) for mothers, fathers, doctors, and the babies themselves using artifacts, documents and images from our extensive 19th and 20th century medical collections.

Future exhibits planned for this year include a look at the Colonial Revival movement in America, and its effects on the county's architecture, fashion, furniture, and activities; and an examination of Montgomery County's long-standing tradition of civic activism, from the Colonial era through today.

- **Collections Blog**
A weekly blog post started in 2009 by long-time MCHS Director of Collections Joanna Church highlights artifacts and archival material from our vast collections. Like most museums, the Society holds many, many more objects than can be displayed at any one time, so the blog provides a way of going behind the scenes and on line to reach a broader audience. "A Fine Collection" features a different artifact every Wednesday, and readers are encouraged to suggest topics related to their interests.
- **Outreach programs**
These will continue as a major focus of MCHS. The staff, board, and volunteers made a unique commitment to expand the reach of the historical society to more accurately reflect the diversity of Montgomery County. Some MCHS outreach programs not listed here separately are Heritage Days, open museum hours, library programs, Genealogy Club programs, seasonal Family Fun Days, Happy Birthday Montgomery County, and Scout Days.

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- **Montgomery County History Day**

Entering its 15th year, this annual competition takes place in March. Over 3,000 students participate at the school level, and 350-400 students participate in the full day competition sponsored and fully administered by MCHS. The Society is fortunate to have the volunteer support of more than 140 adults during the day who supervise, coordinate, monitor, and judge student entries. Winners are announced at a rousing ceremony at the end of the day and awarded by local politicians, school board members, and community activists who encourage and praise the hard work of the students and their teachers. Winners of the County competition move to the State, and those winners go on to the National competition held at the University of Maryland.

- **Center for Suburban Studies**

The mission of this recent initiative encourages a broad range of scholarly studies on 20th century suburban life in Montgomery County and shares those studies with the local community and scholars in innovative ways. The Center emphasizes the creation of a clear, thoughtful and inclusive understanding of Montgomery County's 20th century suburban past to help shape a sustainable future for all citizens. MCHS will continue to act as an advocate for the County archives in an effort to restore researchers' accessibility to these irreplaceable records, which are vital to an understanding of the County's growth.

This year MCHS, the Mary Kay Harper Center and History Associates partnered with the University of Maryland's College of Information Studies to offer a joint Fellowship to a graduate student with the goal of developing a Guide to Primary Sources on the Suburbanization of Montgomery County. We hope to continue offering this Fellowship in future.

- **Tours**

Walking tours around Montgomery County have long proven to be excellent vehicles for interesting residents in the history of their communities. Recent tours have been conducted in Cabin John, Rockville Cemetery, Washington Grove and Garrett Park. We are planning tours of additional communities within the County, as well as a tour of the Seneca Quarry.

Geographic Area Served and Constituency Group Beneficiaries

The Montgomery County Historical Society serves residents of Montgomery County and the surrounding Washington Metropolitan Area. MCHS also provides services to visitors from all parts of the country who visit the museums and library in person and online.

MCHS programs, exhibits, and services are available to the general public, including members, friends, teachers, visitors, researchers, genealogists, scouts, community groups, public officials, students, and others who use the historic resources of the Society. The collections at the Sween Library are a valuable resource for researchers throughout the County and the United States. MCHS staff, board, members, and volunteers work to make history come alive and to ensure that these resources remain accessible.

Expected Accomplishments in 2014-15

- **New Fundraising Initiatives**

MCHS will be instituting a number of new fundraising initiatives this year, including our first foray into online fundraising through power2give, and hosting a historically-themed fundraiser in the Society's early 19th century Beall-Dawson House. Power2give is a web-based fundraising tool through the Montgomery County Arts & Humanities

Council which is oriented to specific projects for which non-profits are seeking funding and is attractive to donors because they have a say in where their donation goes. MCHS hopes to fund the purchase of several new computers we desperately need through this means.

MCHS hosted a gala fundraising event, entitled "Fifteen Stars and Fifteen Stripes: An Evening's Entertainment from the War of 1812" which transported attendees two hundred years back in time for an evening at the Society's Beall-Dawson House filled with period entertainment, reenactors and buffet dinner. A concert of historic music, with the War of 1812 as its theme, provided a suitable soundtrack for the evening. The event met its budgetary target, while introducing a new audience to the Montgomery County Historical Society. We hope to make this an annual event, with changing themes.

The Montgomery County Historical Society will renew the focus on its mission of collecting, interpreting, and promoting the history, heritage, and culture of Montgomery County, Maryland. The organization will sustain its vital place and relevance in the community by strengthening its staff and governing body, presenting outstanding programs and services, strengthening the reach and impact of County history and heritage organizations, maintaining its responsible fiscal policies, continuing its efforts to reflect the inclusive scope of County history for its residents now and in the future, and identifying partners who will assist in this mission.

MCHS was accepted as a Community Engagement Museum Assessment Plan participant, which assesses the museum's understanding of and relationship with its various communities and conversely examines their perception of and experience with the museum. It helps museums gather better input from their constituents, develop a more nuanced view about the community's demographics and needs, respond to the changing nature of its audiences and incorporate these findings into planning and operational decisions. It helps museums form new collaborations and strengthen old ones.

We are hopeful that this assessment will provide MCHS with a starting point for a new strategic plan and, eventually accreditation of MCHS.

MCHS 2014 Calendar

January 25 *History Conference*

February 19 *Colonial Revival Exhibit opening*

March 15 *History Day*

April 6 *Volunteer Tea*

June 4 *Annual Meeting*

June 28 *Civic Activism Exhibit opening*

June 28-29 *Heritage Days/ 150th Anniversary of Jubal Early's Raid*

August 25 *Donor Party*

September 7 *Happy Birthday Montgomery County*

October 4 *1812 Fundraising Gala*

November 1 *Maryland Emancipation Day program*

November 13 *Strathmore Shop-Around*

December *Holiday Tours of the Beall-Dawson House*

Volunteer Brunch

Fete

Yao, Vivian

From: Feinberg, Beryl
Sent: Thursday, April 10, 2014 2:29 PM
To: Yao, Vivian
Cc: Taylor, Richard; Dizelos, Angela; Crane, Michele
Subject: Montgomery County Historical Society and FY14 DGS project

Vivian,

Per your request, the DGS portion re Historical Society project from Fy14 operating budget.

Current Status:

- Most of the Montgomery County Historical Society (MCHS) archives are being housed at Broome School temporarily.
- Montgomery County Records Center moved over 10,000 boxes to clear the area for the construction of the new MCHS climate-controlled office.
- Montgomery County Records Center has installed the much needed new shelving at its current location to allow for additional vertical storage. The additional shelving was needed to make room for MCHS.
- Construction should be completed by the middle of June.
- The cost for the new 2,460sf MCHS is \$99,140.00.
- Beryl Feinberg and Rick Taylor met with Tom Kuehhas, MCHS on April 1, 2014, to update him on the progress of the construction of the new facility.
- Tom Kuehhas, MCHS and Ed Buchanan met at the County's Record Center on April 9th. Ed showed Tom where the MCHS will be located. They both drove to Broome School to locate the archives, shelves and other miscellaneous items.
- The Public will have access to the Historical Society.
- We will need to work with the Historical Society regarding operational hours.

Beryl

Cc: Ric Taylor, Angela Dizelos, Michele Crane

Beryl L. Feinberg, Deputy Director/Chief Operating Officer
Department of General Services
(240) 777-6022 (direct line)
(240) 777-6011 (fax)
beryl.feinberg@montgomerycountymd.gov

Yao, Vivian

From: Kuehhas, Tom [tkuehhas@montgomeryhistory.org]
Sent: Tuesday, April 15, 2014 4:11 PM
To: Yao, Vivian
Subject: RE: FY15 Operating Budget Review of the Historical Society NDA

Hi Vivian,

In looking over your initial email to me, I realized I did not address your questions related to the County Archives.

I'm sure you've receive detailed information from General Services re. their doings.

Provided the timetable they gave me earlier this month is followed, MCHS will begin moving the County Archives from the Broome School to the new section at the Records Center in the middle of June. In the meantime I'll be contacting movers; pricing office furniture, equipment, and additional shelving; and lining up phone and internet service. I, accompanied by our archivist, Linda Kennedy, visited the current location of the archives, the Broome School, to get a handle on the volume of material, and also went to the Records Center to view the space that has been set aside for the Archives.

It will certainly take several months to set up the Archives, prior to the public being allowed access. We had preliminary discussions with DGS regarding the review process, but these will need to be formalized and the various County departments will need to be contacted and apprised of the review process.

As I stated earlier, provided the timetable is accurate, we should be able to use the funds set aside to set up the office, run phone lines, move the Archives to the new location, and be a good way toward organizing the records. The only line item I foresee not being fully expended would be the Archivist's hours. There is preliminary work that she will be taking on prior to the actual transfer of the Archives from Broome to the Records Center, but I don't think the full amount will be spent.

Sorry I missed that part!

Best,
Tom

From: Yao, Vivian [mailto:Vivian.Yao@montgomerycountymd.gov]
Sent: Tuesday, April 08, 2014 10:44 AM
To: Kuehhas, Tom; Taylor, Richard; Feinberg, Beryl; Finn, Erika Lopez; Bryant, Jennifer
Subject: FY15 Operating Budget Review of the Historical Society NDA

Hi All,

Hope you are doing well! I wanted to touch base with you about the upcoming FY15 budget session for the Historical Society. As you probably know, the HHS Committee is scheduled to review the MCHS NDA on April 21 at 9:00 a.m. in the COB 3rd Floor Conference Room.

I will be working on the packet next week and was hoping to get the following from MCHS by Monday, April 14:

- MCHS's FY15 budget request;
- MCHS's FY14 budget with expenditures and revenues by source and FY15 draft budget including recommended FY15 County funding;
- A description/break out of how MCHS will be using the recommended \$77,250;
- MCHS Annual FY13 Report (or an update on MCHS activities in FY13 if annual report is not available); and
- Programming highlights for FY14 and FY15.