

A MESSAGE FROM THE DIRECTORS

Welcome, members of the 63rd Montana Legislature.

We are proud to introduce you to the staff of the Legislative Branch. These talented, dedicated, and experienced employees have already spent hundreds of hours preparing for the 2013 session so that you can now do your job more efficiently and effectively.

We welcome the opportunity to help you in any way we can as you undertake the important duties to which you were elected.

You'll see that the staff entries in this guide are organized by the role the individual plays during the Legislature, to help you determine whom to approach with what type of question. The entries also include each employee's job title, contact information, and, where appropriate, their areas of policy and budget expertise, so you can contact them directly with your specific concerns.

We have provided you information on staff contact teams – made up of policy, legal, and budget staff and audit managers – in order to provide transparent service to the Legislature. Our objectives are to provide legislators with an initial point of contact in each policy and budget area and to ensure that there is no wrong door for assistance. Anyone on the team can assist in obtaining the information you need.

We hope this guide will help you determine who best can answer your questions or assist you with your work. Please feel free to contact us any time!

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CONTENTS

Message from the Directors.....	1
Staff Contact Teams	4
Legislative Fiscal Division Overview	6
Fiscal Division Staff	8
Legislative Services Division Overview	11
Services Division Staff.....	14
Committee Staff & Bill Drafters	14
Information Resources.....	17
Computer Support	20
Technical Editors	22
Document Support.....	23
Legislative Audit Division Overview	24
Audit Division Staff	27
Financial-Compliance Auditors.....	27
Performance Auditors.....	30
Information Systems Auditors.....	32
Audit Support Staff	33
Index of All Staff	35

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STAFF CONTACT TEAMS

In an effort to provide easy access to legislative staff who can assist in specific policy and budget topic areas, we have created the chart below.

If you have questions regarding a specific area of policy or budget, these staff have relevant experience and can be your first point of contact. Don't worry if you're not sure which staffer is the right one. There is no wrong door; every staffer can point you in the right direction.

Our staff have experience in many areas, and these categories do not reflect the full expertise of the staff listed. The number after each name refers to the page on which you can find that staff member's contact information.

For help with computer issues, please contact:

Information Technology Help Line
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TOPICS	RESEARCH, LEGAL	FISCAL	AUDIT
Business, Labor & Economy			
Employment, workforce development, economic development	Pat Murdo, p. 16 Bart Campbell, p. 14	Kris Wilkinson, p. 10	Kent Rice, p. 32
Education			
K-12, post-secondary, school finance, tribal government	Casey Barrs, p. 14 Pad McCracken, p. 15 Laura Sankey, p. 16	Barbara Smith, p. 10 Pam Joehler, p. 8 Jim Standaert, p. 10 Rob Miller, p. 9	Jennifer Erdahl, p. 27
Health & Human Services			
Health care, health delivery, mental health, human services	Sue O'Connell, p. 16 Alexis Sandru, p. 16	Lois Steinbeck, p. 10 Marilyn Daumiller, p. 8 Rob Miller, p. 9	John Fine, p. 27

TOPICS	RESEARCH, LEGAL	FISCAL	AUDIT
Local Government			
Issues intersect in many budget and policy areas	Leanne Kurtz, p. 15 Ginger Aldrich, p. 14	Cathy Duncan, p. 8	None (legislative audit functions do not extend to local government)
Natural Resources			
Environment, fire, agriculture, water, fish, wildlife, parks, land use, energy, telecommunications	Sonja Nowakowski, p. 16 Jason Mohr, p. 15 Joe Kolman, p. 15 Hope Stockwell, p. 17 Helen Thigpen, p. 17 Leanne Kurtz, p. 15	Christina Allen, p. 8	Brenda Kedish, p. 28
Public Safety & Justice			
Corrections, courts, public defenders, attorney general, justice, disaster & emergency management	Helen Thigpen, p. 17 Julianne Burkhardt, p. 14 Sheri Scurr, p. 17 Dave Bohyer, p. 14	Greg DeWitt, p. 8	Joe Murray, p. 32
State Finances, Revenue & Taxation			
State revenue, expenditures & projections, taxation	Megan Moore, p. 16 Jaret Coles, p. 14 Julie Johnson, p. 15	Taryn Purdy, p. 10 Terry Johnson, p. 9 Barbara Smith, p. 10 Roger Lloyd, p. 9 Stephanie Morrison, p. 9 Brian Hannan, p. 8	Jeane Carstensen-Garrett, p. 27
State Administration & Public Services			
Elections, veterans, public retirement, state employees, transportation, redistricting	Dave Bohyer, p. 14 Rachel Weiss, p. 17 Sheri Scurr, p. 17 Casey Barrs, p. 14	Kris Wilkinson, p. 10 Joe Triem, p. 10 Cathy Duncan, p. 8	Lisa Blanford, p. 30

LEGISLATIVE FISCAL DIVISION



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The Legislative Fiscal Division (LFD) comprises the Legislature's nonpartisan fiscal staff. The LFD helps the Legislature meet its public policy goals by providing information relating to budget and fiscal matters. By statute, the division is charged with several duties:

- Provide fiscal analysis of state government and accumulate, compile, analyze, and furnish information on fiscal matters of state government.
- Study the economy and efficiency of state government.
- Estimate revenues.
- Analyze the executive budget and budget requests.
- Make any reports and recommendations considered desirable or as requested by legislators.
- Assist committees and individual legislators in compiling and analyzing financial information.
- Provide staff assistance to the Revenue and Transportation Interim Committee.

During the legislative session, the division meets these responsibilities by providing:

- an independent analysis of the proposed executive budget conducted in the months prior to the legislative session, followed by publication and distribution of those findings to all legislators;
- staffing to appropriations subcommittees, the House Appropriations Committee, and the Senate Finance and Claims Committee;
- staff assistance to the House and Senate Taxation Committees;
- fiscal status reports and estimates of the general fund balance, given actions and assumptions of the Legislature throughout the session; and
- responses to requests from individual legislators on any fiscal matters.

During the interim between legislative sessions, the division:

- tracks expenditures, appropriations, and revenues;
- produces fiscal-related research in any area of state government finance, as authorized by the Legislative Finance Committee;
- assists the Revenue and Transportation Committee, as well as other interim legislative committees, as requested;
- staffs the Legislative Finance Committee and all its subcommittees, if any; and
- assists individual legislators with informational and research needs.

The division consists of 19 staff members who serve in three sections:

► **Revenue Estimation & Tax Policy Analysis**

These staff provide objective, impartial estimation of state revenues during legislative sessions and interims. They also analyze all bills impacting tax policy and collections during the legislative session and assist House and Senate Tax Committees and the Revenue and Transportation Interim Committee.

► **Expenditure Analysis**

These staff provide objective, impartial analysis of state agency operations and expenditures during legislative sessions and interims. They staff appropriations subcommittees, write the general appropriations act, and conduct fiscal research as required or requested.

Each analyst in this section specializes in the operations and budgets of a particular group of state agencies. Analysts assigned to a given section can answer any questions you may have about individual agencies and their budgets, as well as about general budgeting and appropriations.

► **Operations Management**

The personnel in this section are responsible for providing coordination and organization for the division and communication via the web and other media.

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LEGISLATIVE SERVICES DIVISION



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The Legislative Services Division (LSD) operates under policies and guidelines set by the Legislative Council, a 12-member, bipartisan committee made up of legislative leaders and other members of the Senate and House of Representatives.

The mission of the division is to provide policy and legal research, reference and communications, information technology, and administrative support services to the House, Senate, and other divisions of the Legislative Branch and to support the mission of the Legislative Council.

Established in 1957 as the Montana Legislative Council, the Legislative Services Division was originally created by the Legislature as a permanent agency to provide information to legislators and the public and to study selected problems confronting the Legislature in the interims between biennial sessions.

Since then, the Legislature has added to the division's duties and responsibilities in a variety of areas. In 1995, the Legislature reorganized the agencies of the Legislative Branch. Among other things, the division staff now includes staff from the Legislative Environmental Policy Office (LEPO), which formerly was known as the Environmental Quality Council staff.

The division is organized into five functional offices, each of which is nonpartisan and serves the entire Legislature. These are:

- Central Services Office
- Communications Office
- Office of Legislative Information Technology
- Legal Services Office
- Office of Research and Policy Analysis
- Legislative Environmental Policy Office

► **Central Services Office**

This office includes purchasing, financial services, human resources services, bills and amendments processing, Montana Code Annotated (MCA) and Annotations production, and legislative printing and distribution.

Central Services employees maintain year-round Legislative Branch accounting and personnel records for permanent and temporary employees and legislators, process claims and payroll, prepare and monitor Legislative Branch budgets, and purchase supplies and equipment.

Bills and amendments processing staff are responsible for the final input, proofing, and preparation of all introduced bills and the engrossing and enrolling of bills during legislative sessions. During the interims, their responsibilities include the update and proofing of the MCA and the Annotations databases.

► **Legislative Communications Office**

This office coordinates communication and public outreach for the legislative branch. The library staff provide research and reference services through the Legislative Reference Center, as well as access to information from many sources for legislators and staff. Office employees also oversee audio/visual operations, website content and layout, publication and distribution of various legislative documents, including the Montana Code Annotated (MCA) and Annotations, and access to legislator and public information. The office also operates an information desk during legislative sessions to provide general information to the public and Capitol visitors and telephone reception and messaging services for legislators.

► **Office of Legislative Information Technology**

This office provides information technology support for the Legislative Services, Fiscal, and Audit Divisions and, during sessions, for the House of Representatives and the Senate. Staff members include network support personnel, systems analysts, and programmer analysts who plan, develop, and maintain the computer network, systems, and applications for computer processing activities for the branch.

One of the key systems this office supports is the Legislative Automated Workflow System, or LAWS. It provides public Internet access to the full text and up-to-date status of bills, agendas, and schedules for committee

hearings and floor sessions, as well as House and Senate votes. LAWS is accessible online at leg.mt.gov/laws.htm.

► **Legal Services Office**

Legal Services provides primary legal support for the Legislative Branch. During sessions, legal staff draft bills and amendments and support standing and select committees. During interims, they codify changes to the MCA, support interim committees in administrative rule review and analysis of legal issues, update the annotations to the MCA, and review all proposed ballot measures.

This office supports the Code Commissioner, who is responsible for the codification, indexing, arrangement, and updating of the text and annotations of the MCA. The staff attorneys provide legal counseling and legal opinions to legislators on issues of state law. Technical editors support bill and amendment drafting and production of the MCA and annotations.

► **Office of Research & Policy Analysis**

This office performs generalized and specialized research and policy analysis, reference, and information functions. During sessions, the research analysts draft bills and amendments and staff standing and select committees. During interims, research analysts provide primary organizational support and research and analysis for interim committees.

The staff secretaries provide support to the division and to interim committees by organizing meetings, producing minutes, processing division documents, and assisting with bill production.

► **Legislative Environmental Policy Office**

This office performs research and policy analysis, reference, and information functions related to environmental, natural resource, and energy matters. The Legislative Environmental Analyst heads this office.

The staff supports the Environmental Quality Council in its statutory duties and in its function as an interim committee. During sessions, the policy analysts draft bills and amendments and staff standing and select committees. During interims, the staff provide primary organizational support, research and analysis, and publication production for the Environmental Quality Council and other statutory interim committees.

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LEGISLATIVE AUDIT DIVISION



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The Legislative Audit Division (LAD) is one of three permanently staffed divisions of the Legislative Branch of Montana state government. Article V, section 10(4), of the Montana Constitution mandates a legislative post-audit function. The Legislative Audit Act, contained in Title 5, chapter 13, MCA, establishes the Legislative Audit Committee of the Montana Legislature and the Legislative Audit Division.

The Legislative Audit Committee is a bicameral and bipartisan standing committee of the Montana Legislature. It consists of six members from the Senate and six from the House of Representatives. The audit committee appoints, consults with, and advises the Legislative Auditor. It also reviews the audit reports submitted by the Legislative Auditor, releases the reports to the public, and serves as the conduit between the Legislative Auditor and the Legislature.

As legislators and administrators try increasingly to allocate public resources effectively and make government work more efficiently, the need for independent, objective, fact-based evaluations of the stewardship, performance, and cost of government policies, programs, and operations is essential. The Legislative Auditor and her staff have the statutory authority to examine, at any time, all the books, accounts, and records, confidential or otherwise, of a state agency.

The Legislative Audit Division is responsible for conducting financial-compliance, performance, and information system audits of state agencies and their programs, including the university system, in accordance with Government Auditing Standards.

Any member of the Legislature may request an audit by the Legislative Auditor of any activity of state government. In addition, the Legislative Auditor and staff will assist any member or committee of the Legislature by gathering and analyzing information when requested.

The Legislative Audit Division is made up of administrative staff and three operational components:

- Financial-Compliance Audits
- Information Systems Audits
- Performance Audits

Financial-Compliance Audits

Financial-compliance audits determine if an agency's financial operations are properly conducted; if the agency has complied with applicable laws and regulations; and if the financial reports are presented fairly. Financial-compliance audit staff members hold degrees with an emphasis in accounting. Most staff members hold certified public accountant (CPA) certificates.

The primary objectives of financial-compliance audits are to ascertain that agencies:

- spend money only on authorized activities and in accordance with the requirements of applicable laws and regulations;
- collect and account properly for all revenues and receipts arising from their activities;
- maintain adequate safeguards and accountability for assets in their custody; and
- submit reports and financial statements to the Governor, the Legislature, and central control agencies to fully disclose the nature and scope of the activities conducted and provide a proper basis for evaluating the agencies' operations.

Information Systems Audits

Information systems audits are designed to assess controls in an information system (IS) environment. With the increase in computerization of state government, IS controls provide assurance of the accuracy, reliability, and integrity of the information processed. Auditors determine whether controls exist and are operating as designed. They examine controls

to determine whether assets are adequately safeguarded and whether computer-generated information and reports are reliable.

Information system audits include an annual audit of the state's information processing facility and Statewide Accounting, Budgeting and Human Resource System (SABHRS). The information system audit staff also audits state departments' data processing functions and participates in planning and reviewing work on various financial-compliance and performance audits.

Members of the IS audit staff hold degrees in disciplines including business, accounting, education, computer science, mathematics, political science, and public administration.

Performance Audits

Performance audits assess the effectiveness and efficiency of the operations of state government. To fulfill this purpose, members of the performance audit staff hold degrees in disciplines such as business and public administration, journalism, accounting, economics, sociology, finance, political science, English, anthropology, computer science, international relations/security, and chemistry.

The performance audit process starts with a review of statutory directives and program goals and objectives. Auditors establish audit criteria and evaluate the program to see if statutory directives are met and associated goals achieved. They also evaluate whether those directives and goals can be achieved with greater efficiency and economy while being properly controlled and managed.

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INDEX OF ALL STAFF

Adams, Lenore.....	17	Harrington, John.....	31
Aldrich, Ginger.....	14	Hayes, Kevin	18
Allen, Christina	8	Hernandez, Ann.....	33
Allen, Mike.....	20	Hicks, Dawn	18
Barrs, Casey	14	Hom, Fong	23
Bell, Ryan.....	20	Hunthausen, Tori	24
Bergman, Lesley	17	Joehler, Pamela.....	8
Blanford, Lisa.....	30	Johnson, CJ.....	19
Bohyer, Dave.....	14	Johnson, Julie	15
Brammer, David	27	Johnson, Ross	31
Burkhardt, Julianne	14	Johnson, Terry	9
Bush, Sally	22	Jorgenson, Cindy	28
Butler, Deborah	33	Kedish, Brenda.....	28
Campbell, Bart.....	14	Kilgariff, Graham.....	28
Carlson, Amy	6	Kolman, Joe	15
Carlson, Sarah.....	30	Kueffler, Karen	19
Cannon, Courtney.....	18	Kurtz, Leanne.....	15
Carstensen-Garrett, Jeane	27	Lang, Angela	33
Churchill, Jerry.....	20	Lindbo, Sherrie	28
Coles, Jaret	14	Lindsay, Susie.....	9
Coy, Megan.....	30	Lloyd, Roger	9
Darragh, Chris.....	27	Lockett, Cyndie	21
DaSilva, Kelly	18	Maciver, Angus	31
Daumiller, Marilyn.....	8	Matheson, Dale	21
DeWitt, Greg.....	8	McCormick, Ken	31
Dixon, Connie	22	McCracken, Pad	15
Duncan, Cathy	8	McDuffie, Diane.....	9
Eller, Steve	20	McLean, Darrin.....	21
Erb, Steven	30	Miller, Rob	9
Erdahl, Jennifer.....	27	Mohr, Jason	15
Everts, Todd	15	Moore, Megan.....	16
Field, Dawn.....	23	Morrison, Stephanie.....	9
Fine, John	27	Murdo, Pat.....	16
Foster, Sky.....	20	Murray, Diedra.....	31
Fox, Susan Byorth	11	Murray, Joe.....	32
Franks-Ongoy, Andrew	18	Northerner, Jesse	22
Gavin, Sonia	18	Nowakowski, Sonja.....	16
Gibson, Natalie	28	O'Connell, Sue	16
Gillespie, Josh	20	O'Dell, Alexa	28
Gordon, Jim	21	O'Loughlin, Paul	29
Gow, Dale	21	Patten, Ann	23
Grotbo, Tatiyana	33	Plummer, Delsi.....	29
Guenther, Katherine	31	Purdy, Taryn.....	10
Hannan, Brian.....	8	Rice, Kent.....	32

Rowan, Denise.....	33	Steinbeck, Lois.....	10
Rusek, Kip.....	23	Stockwell, Hope.....	17
Rustemeyer, Maria.....	29	Theisen, Maureen.....	19
Sandru, Alexis.....	16	Thigpen, Helen.....	17
Sankey, Laura.....	16	Thomas, Jeff.....	22
Scurr, Sheri.....	17	Toeckes, Laura.....	29
Semans, Alysa.....	21	Trenk, Hank.....	22
Shaw, Vanessa.....	29	Triem, Joe.....	10
Simmons, Jennifer.....	19	van Slyke, Torry.....	32
Simpson, Karen.....	29	Weiss, Rachel.....	17
Sloan Harris, K'Lynn.....	19	Weitz, Pam.....	19
Smith, Barbara.....	10	Wilkinson, Kris.....	10
Soller, Will.....	32	Yates, Zac.....	30
Standaert, Jim.....	10		