



MONTANA LEGISLATIVE BRANCH

Legislative Fiscal Division

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Legislative Fiscal Analyst
CLAYTON SCHENCK

January 30, 2006

Randy Morris, Administrator
State Personnel Div.
PO Box 200127
Helena, MT 59620-0127

Dear Mr. Morris:

As part of its oversight responsibilities the Legislative Finance Committee (LFC) has been receiving and reviewing updates on activities of and progress by a number of state functions. As a part of this ongoing effort, the LFC is requesting an update on the published goals and objectives (attached) for the following function of your agency:

State Personnel Division

The committee would like an informal response that addresses how well you are meeting each of the stated goals and objectives. Be specific where you can. A standard form is attached for your convenience.

Please provide your response by February 17, 2006, which you may send via email to Diane McDuffie at dimcduffie@mt.gov. Your response will be forwarded to the members of the committee, and a discussion will be considered for inclusion at the next LFC meeting.

We appreciate your attention to this request. If you have any questions, please contact Taryn Purdy at tpurdy@mt.gov or at 5383.

Sincerely,
Clayton Schenck

cc: Steve Bender, Deputy Director

Legislative Finance Committee Update on Goals and Objectives

Agency: Department of Administration
Function: State Personnel Division
Agency Contact: Randy Morris, Administrator
LFD Contact:
Respond By Date: February 17, 2006
Email to: Diane McDuffie, dimcduffie@mt.gov

Please discuss how well are you meeting each of the published goals and objectives (attached) for the listed function(s) for the current fiscal year. Be as specific in your response as possible. For example, what (if anything) are you measuring to determine accomplishments? Are you progressing towards goals? Have you suffered any setbacks or encountered any particular challenges? How can the legislature assist you?

2006 GOALS STATE PERSONNEL DIVISION

EMPLOYEE BENEFITS BUREAU

The Employee Benefits Bureau provides State employees/retirees with group medical, dental, prescription, life and other related group benefits in an efficient manner and at an affordable cost by administering a solvent, prudent benefits program.

Mission Statement

To provide a financially sound fringe benefit package designed to maintain the health, well-being, and financial security of State of Montana Employees, Retirees, Legislators, and their families.

Goals:

Administer existing benefit programs ensuring the consistent application of eligibility rules, plan allowances and claims payments and maintaining financial soundness.
Analyze plan changes based on input from employees, labor, management, and legislative requirements

Objectives:

- Maintain expertise in employee fringe benefit administration and the laws and regulations that govern benefit plans

- Assist employees and agency personnel on issues related to benefit choices and program cost implications
- Periodically Survey employees on satisfaction with existing programs and plan changes
- Revise website to provide up-to-date and easily accessed information to members
- Develop medical management programs to enhance the efficiency and effectiveness of benefit delivery

Performance Measures:

- Support and provide professional development activities and training of Bureau staff ensuring at least one course/conference per year

In order to ensure that the Bureau maintains high quality current benefits programs, we educate staff in subject matter areas that they are responsible for overseeing. Staff maintain expertise in benefits administration, laws, and regulations that govern benefits plans through training courses, use of up-to-date research tools such as on-line Thomson/West HR Advisor (employment and benefits law), interaction with peers in the benefits field, and attendance at conferences such as the State and Local Group Benefits Administrators (SALGBA – a nationwide organization of governmental benefits administrators). Professional development and training is targeted with a goal toward immediate return on investment in program design and management.

Examples of professional development and training for staff during the FY2006 year to date include:

Director of Medical Management – The Bureau has provided fees and materials costs related to participation in the Certified Employee Benefits Specialist (CEBS) program. This program is one of the most widely recognized certification programs in employee benefit education and is co-sponsored by the International Foundation and Wharton School of the University of Pennsylvania. The incumbent completes the course work on their own time. The advantage to the State has been significant

broadening of the individual's knowledge of employee benefits which were most recently applied in the development of a new long-term disability benefit and re-procurement of the long-term care benefit. For both of these benefits, staff was able to secure a guaranteed issue provision (no medical underwriting) for employees coming onto the programs during the 2006 Annual Change period.

Case Management Staff – The State has two RN case managers who are also certified case management professionals. They maintain certification through continuing education annually. In addition, the State's lead case manager attended a training which focused on treatment of neonates (premature babies). Out of that training she learned that a significant predictor of premature birth was cervical length in women. A transvaginal cervical ultrasonography is a non-invasive test that is a good predictor of the likelihood of pre-term birth. By administering this test, a treatment plan can be formulated earlier in the pregnancy to help high risk pregnancies to term. This has been incorporated into the case management model used by the Bureau.

- Develop a communications program about existing programs and proposed benefit changes and visit regional sites at least once every two years

Each year in the fall, the Bureau develops and distributes Annual Change materials to all employees, retirees, and their families for making benefit elections in the upcoming year. The materials include the Annual Change Benefit Booklet which contains information about existing programs as well as changes to programs for the upcoming benefit year. In addition staff travels to cities around Montana to meet with State employees and retirees to present information about their benefits and answer any questions they may have. During the fall of 2005, staff visited 15 cities in Montana.

Outside of Annual Change, staff participates in Pre-Retirement seminars which take place around the State. Semi-annual newsletters have been added as a new communication feature in 2005. Staff are available to agencies and employee groups to present information or answer questions on benefits at any time during the year.

The Bureau maintains up-to-date information on the website for employees and retirees to access. The Communications Director is responsible for ensuring materials are updated timely and are available through the website. Examples include the Summary Plan Documents for medical plans, New Employee Booklet, Retiree Booklet, forms, the Annual Change booklet and program information related to Wellness and upcoming events.

The State Personnel Division recently conducted a survey of agency customers regarding performance of individual Bureaus within the Division. The Employee Benefits Bureau scored well with 87% of respondents either highly satisfied or satisfied with benefits programs offered and customer service.

- Revise and issue benefits newsletters on a semi-annual basis. Focus on education of employees and provide them with information and tools to make informed choices about their consumption of health care

As noted above, in 2005 the Bureau began issuing benefits newsletters on a semi-annual basis. The focus is primarily on teaching employees and retirees how to be better consumers of health care and how to reduce their consumption of health care by taking better care of themselves and their families. Our initial newsletter included tips for employees on how to use their benefits, food safety tips, notices for health screenings, notice of upcoming educational material for Medicare Part D and contact information for the various health plans and the Employee Benefits Bureau.

Provide support and testimony on legislative changes affecting employee benefits

Objectives:

- Review legislation impacting the State Employee Benefits program. Make recommendations regarding positions on legislation, provide information or testimony as required, and analyze impact of legislation. Work with various interested parties on joint positions or response to legislation.
- Assist Interim Committees monitoring fringe benefit issues

Performance Measures:

- Prepare legislation placeholders by April 15, 2006 for Bill drafting and support or defend legislation impacting the benefits program

Most recently the Bureau has worked on two issues before Legislative committees:

- Testimony before the Quality Schools Interim Committee regarding the impact of assisting in managing K-12 schools health care costs or including K-12 schools in the State Employee Plan.
- Currently the Economic Affairs Interim Committee is reviewing issues related to identity theft; the Bureau is specifically addressing the question of removing social security numbers from insurance identification cards.

The Bureau has begun working with other bureaus in the State Personnel Division to submit legislation placeholders and develop legislation for the 2007 Legislative session. Initial legislative concepts (to the extent known) have been submitted.

- Assist the Small Business Insurance Pool effort in developing small business coverage

The current Chief of the Employee Benefits Bureau was named by the Governor to the Board of Directors of the Small Business Insurance Pool. To date the Board and staff have developed a product offering, contracted with Blue Cross and Blue Shield of Montana to offer coverage and administer the product on behalf of the Pool, compiled a list of small businesses wishing to participate in the pool, and begun enrolling businesses. As of February 6, 2006 a total of 80 businesses had received quotes on coverage and 38 were enrolled and receiving coverage through the program.

Investigate proven cost containment features and other health benefit program initiatives for applicability and implementation

Objectives:

- Assess the efficiency of existing provider network and cost-containment programs (including PPO networks) in achieving the maximum benefit for the State Employee Benefits program.

- Review performance of self-insured managed care plans. Analyze costs of plan (risk-adjusted) relative to self-insured indemnity plans.
- Assess the CVS/PharmaCare Rx contract and benefits to determine if the contract is cost-effective. Review additional Rx management programs offered by CVS/PharmaCare. Submit plan improvements to SEGBAC and make necessary program changes for 2007/2008.
- Develop and maintain schedule for re-procuring contracts necessary for the administration of fringe benefit program offerings. Includes assessment of the existing contract performance and recommendations for new strategies in benefits management to be implemented under new contracts.

Performance Measures:

- Report cost containment results to SEGBAC during 1st Quarter of 2006 and analyze additional areas of improvement identified by the Council. Develop recommendations for benefits changes to be implemented each benefit year and present to the Council.

The Bureau has a Medical Management section which is charged with developing programs to enhance benefit effectiveness and efficiency. Initiatives include the development of in-house Case Management services which have allowed the Bureau to provide more comprehensive services to plan members at a lower cost and have impacted the rate of increase in overall medical expenditures. Other initiatives include Specialty Pharmacy which allows members to choose certain pharmaceuticals to be delivered through alternative settings free to the member (the State waives deductibles and any co-payments or coinsurance) while achieving a significant savings for the benefit plan. This includes moving the costs incurred for these types of drugs out of a hospital or physician office setting where there are no discounts to the Specialty Pharmacy where Bureau staff have negotiated significant discounts. The member's care is accompanied by case management services through the Specialty Pharmacy to ensure usage compliance and reduce waste of very high cost drugs. Finally, the Bureau is developing a continuum of programs from wellness (rewarding healthy behaviors in members), to disease

management of high-cost disease states (cardiac, obesity, and drug and alcohol use), through case management. These programs include current pilot programs such as *Well On the Way* (disease management) and *Why Weight?* (obesity management).

Beginning in July 2005 the Bureau met with the SEGBAC and presented results of the financial performance of the Plan which continue to be favorable. The Council had established a target of two months of reserves in excess of the statutorily required reserve, which the Plan has met. During SEGBAC meetings in July 2005 and August 2005 the Bureau presented benefit change proposals to the Council including: (1) an enhancement to the mammogram benefit on the Traditional Plan to now cover a screening every year beginning at age 40 and one screening between the ages of 35-39; (2) make no out-of-pocket increases in premiums; (3) a reduction in dental premiums; and (4) reduce premiums slightly for Medicare eligible retirees due to Medicare Part D subsidies. The next SEGBAC meeting is scheduled for March 16-17, 2006.

Implement and administer ancillary benefit programs related to wellness, health enhancement, and quality-of-life

Objectives:

- Revise the Health Screening program to provide for real-time analysis and reporting to participants.
- Manage implementation of VEBA legislation and assist agencies and employees in selection/election process
- Assist vendors in complying with HIPAA requirements
- Coordinate and administer Spring Fitness 2006 program

Performance Measures:

Health Screening Program During the fall of 2005 participants received real-time reports and analysis of their health screening results on-site. Plan members each receive a free health screening every other year. Spouses and children may receive a screening or members during their off-year at a reduced cost. Participants choose to have blood drawn

(which does not have real-time result capabilities) or use a finger-poke to analyze their blood. A registered nurse is on-site to visit with any participant who has questions or to assist participants in accessing a medical professional if their results indicate the need for medical attention is urgent.

VEBA Implementation The Bureau has been responsible for implementation of the VEBA program which is available to all non-federal public employees in Montana. The initial offering was to State of Montana employees in the fall of 2003. Currently there are 1,240 State of Montana employees in 14 agencies enrolled in the program. In addition to assisting agencies and employees in the selection and election process, the Bureau has assisted a smaller number of employees from cities, counties and some school districts to participate in the program.

HIPAA Compliance Under HIPAA (the Health Insurance Portability and Accountability Act), the State Employee Benefit Plan is a covered entity. As such, the Bureau has worked with Department of Administration counsel who serves as the HIPAA privacy officer to establish Business Associate agreements, establish electronic exchange protocols, and conduct business in accordance to HIPAA guidelines.

Spring Fitness 2006 The Bureau offers an annual Spring Fitness program as a component of the overall wellness offerings to employees. This is an 8-week walking/exercise program. For spring 2006 the Bureau will be offering "Route 66" which allows participants to walk along the historic Route 66 via a website by entering their distance or equivalent exercise effort on the site. Teams or individuals compete against each other or themselves during the program in an effort to motivate individuals to establish a healthy behavior and maintain the behavior after the program ends.

HUMAN RESOURCES STANDARDS AND SERVICES

The HRSS Bureau provides technical expertise and administrative oversight to state agencies in all areas of Human Resource Management to include market analysis, position classification, employee compensation, recruitment and selection, competency development, workforce

planning and performance management. The bureau develops and issues personnel policies for the executive branch and produces interpretive guidelines, model policies and issue papers.

Mission Statement

To design, foster and promote effective, efficient and innovative human resource systems that support state agencies in attracting, developing, retaining a productive workforce and becoming an employer of choice.

Cause

Building strong organizations through quality HR systems.

Goals

Provide professional expertise to agencies in the area of compensation planning and competency development

Objectives:

- Make customer service a priority through the establishment of advisory committees, account executives, and timely communication of activities
- Encourage movement by all agencies to the Broadband Pay Plan
- Develop market analyses for each class of positions in the Broadband Pay Plan based upon survey analyses
- Integrate salary and benefit delivery systems towards a total compensation philosophy
- Continue to assist agencies in the development of and use of competency management.

Performance Measures:

- Survey agencies at the end of current biennium to determine improvement in customer service and products by Bureau staff

Agency customers surveyed in December/January. Bureau customer satisfaction levels show some areas of improvement and two areas of slight decrease. Comments suggest the 60% turnover of bureau staff during the year leading to a slight reduction in satisfaction due to drop in expertise. Survey results still 1-2 points ahead of 2003.

- Assist in the transition of an additional 20% (800 employees) of remaining workforce to the Broadband Pay Plan by assisting agencies to define the

administration parameters for setting pay, adjusting salaries, identifying competencies and rewarding performance

Bureau assisted the transition of an additional 1,049 employees to the broadband plan, 31% over goal levels.

- Implement the 2004 Compensation Committee recommendations by staffing a workgroup with diverse agency representation to produce recommendations for future pay negotiations and pay practices

This committee was established and the State of the Pay report was issued to the Governor in October of 2004. The establishment of a Governor's Special Task Force is exploring those committee recommendations on pay. Their work will be completed by April of 2006.

- Provide timely communication to agencies through updates to the Division website detailing meetings, agendas, and minutes

The State Personnel Division website is continually updated and includes all current committees, agendas and minutes. E-mail reminders are sent out to mailing lists to reference when new items are posted to the website.

- Work with the Benefits bureau to produce a Total Compensation Statement for each employee to communicate the actual rewards value of working for the state

The first Total Compensation Statement was mailed to all employees in May of 2005. The bureau assisted in the efforts to design the statement.

- Provide training for agency staff on FMLA, Recruitment and Selection and MOM policies

Individual with technical expertise transferred to another agency training in FMLA was conducted during 1st Quarter 2006.

- Improve the classification appeal process in conjunction with the unions and the Board of Personnel Appeals

Multiple language and process changes have been proposed to labor management. Work continues on achieving a streamlined process.

IT Projects to Support Goal/Objectives:

- Intranet/Internet based survey tools for agencies, employees, and external surveys

Research and advocate for recruitment and retention programs to attract the best and the brightest employees

Objectives:

- Consult with agencies to continually improve the recruitment and selection process
- Create new Recruitment and Selection rules through an open process
- Create a pool for Administrative Support positions to streamline hiring of these positions and the application process
- Maximize recruitment and selection process efficiencies through the deployment of self-service functionalities of the SABHRS system and enhancing abilities in current HR modules of SABHRS to include competency management, plan careers, recruit workforce and administer training.
- Analyze termination reports completed by agencies at the end of the calendar year.
- Survey retirement eligible employees and develop a Workforce Planning Model & Guidelines
- Conduct the annual HR conference in the fall

Performance Measures:

- Develop a web-based application that will be available for users by June 2006

This effort is a joint project with ITSD. The start of the project was delayed until October 2005 until the redesign of the state web pages was completed. State Personnel is now working with state agencies in gaining approval to accept electronic applications. It is expected this project to be completed on time.

- Implement E-profile and E-pay self service modules of PeopleSoft by Aug 2005

E-profile was implemented on August 1, 2005 and allowed employees to manage certain data fields in the SABHRS system. Employees are now allowed to update personal data including: emergency notifications, addresses, direct deposits, and request a duplicate W-2. E-pay was also released to employees on August 1, 2005 and allowed employees to turn off the option of printing payroll warrants and advices and to view paycheck information electronically.

IT Projects to Support Goal/Objectives:

- Install additional functionality of PeopleSoft Self Service modules

PAYROLL AND BENEFIT OPERATIONS

The Payroll and Benefits Operations Bureau operates the PeopleSoft payroll, benefits and HR system to process, distribute, report and account for payroll, benefits and associated withholding and deductions for over 13,000 state employees in the Executive, Legislative and Judicial branches. The bureau establishes and maintains standards, processes and procedures to be followed by state agencies in preparing and submitting payroll, benefits and related HR data into the system. The system operated by the Bureau provides information and processing in support of division and statewide functions and programs including employee benefits (group insurance, FSA, Deferred Comp.) classification, pay, labor relations, policy and training.

Mission Statement

To maintain benefit eligibility records for employees, retirees, Legislators and COBRA members and to produce accurate and timely warrants, advices, and reports in accordance with fiscally prudent policies, procedures, and schedules utilizing the Statewide Accounting, Budgeting, and Human Resources System.

Goals:

Efficiently process accurate and timely payrolls warrants, vendor vouchers, and journals

Objectives:

- Identify and recommend solutions to improve business processes and system efficiencies
- Assist and train agency personnel in system operations and data management and actively solicit agency input for improvements
- Manage the development and maintenance of payroll/benefits codes used for recording hours, earnings, and deductions
- Produce and verify requested/required reports
- Proactively identify process improvements to the SABHRS network that address system integrity and security
- Work with Legislative Auditors in the complexities of the system to comply with rules, regulations and accepted practices and to prepare auditors for auditing agency benefit and payroll functions.

Performance Measures:

- Issue accurate payroll advices, warrants, vendor vouchers and journals in accordance with established deadlines

The following table summarizes FY04 and FY05 payroll processing activities:

	Total Gross Payroll	Total # of Journals/Vouchers Processed	Total # of Advices Issued	Total # of Warrants Issued
FY 2004	\$554,029,038	9,049	261,712	77,506
FY 2005	\$568,791,236	8,775	267,540	67,685

- Meet biweekly with SABHRS staff to discuss data management, payroll processing, and system reporting issues

Each pay day, management from SPD and SABHRS meet to establish/review short and long term work plans, staffing priorities, and production issues. In addition, lead production staff from SPD and SABHRS meet bi-weekly to discuss the specific details of production issues and options for resolving those issues.

- Promote "paperless" payroll using electronic time entry e-Pay and e-Profile

Currently 5,452 employees are entering their time through the Employee Self Service page located on MINE. In addition, 509 employees have elected to suppress the printing of their bi-weekly payroll advices and instead view their pay on-line. This option became available to employees in August 2005.

- Develop and staff a SABHRS Payroll/Benefits Help Desk

The bureau staffs the Payroll/Benefits Help Desk. This function includes: assisting agency end-users with payroll and benefit processing questions; developing best practices; creating user guides and process manuals; providing group and agency specific training; filling data and report requests; and participating in New Employee Orientation.

- Provide two training programs for agency payroll staff during the calendar year

Each year the bureau participates in two agency wide payroll and benefit briefings. In addition, numerous agency visits to address specific training needs are made. In 2005, 13 training sessions addressing specific user requests were held at 8 different agencies.

- Implement a solution to meet the increased demand for agency reports

In April 2005, a "report writer" position was added to the bureau to assist agencies in meeting data and reporting needs. In the last year, the position has partnered with the Help Desk function to provide approximately 130 reports to end-users.

IT Projects to Support Goal/Objectives:

- Support implementation of "paperless" payroll using electronic time entry, e-Pay and e-Profile
- Identify a more "user" friendly report writing package for SABHRS users
- Participate in the identification of recurring impediments that inhibit/interfere with the biweekly processing of payroll and recommend solutions for resolution
- Reduce the number of manual processes and system work-arounds that detract from staff productivity or contribute to overtime efforts

Maintain data integrity for accrued benefit eligibility, fund/hour balances, and usage

Objectives:

- Manage processes that utilize formulas for the calculation and accrual of: sick, vacation, holiday, compensatory and other paid/unpaid leave hours; pension contributions; deferred compensation withholding, and VEBA participation
- Produce timely reports to agencies, legislators, employees, and public regarding account balances

Performance Measures:

- Cooperate with auditing teams during the review of established practices and respond to Findings and improvement recommendations

Cooperated with the most recent Legislative Audit. There were no significant Findings identified or improvements recommended.

Analyze self-service functionality of SABHRS system

Objectives:

- Continue to seek process improvements and workflow efficiencies utilizing self-service functionality while maintaining system and data integrity
- Implement additional self-service functionality

Performance Measures:

- Provide administrative oversight of SABHRS staff's analysis, testing and implementation of PeopleSofts' e-Pay, e-Profile and e-Benefits functionality

In February 2005, SPD and SABHRS began the process of implementing Employee Self Service. On August 1, 2005 e-pay and e-profile functionality was rolled out to approximately 11,000 state employees. This project provided employees with on-line access to view their personal and payroll information, enter timesheets, request W-2 reprints, submit W-4 elections, make and/or change direct deposit information, and suppress the printing of their payroll advices. The e-Benefits rollout is targeted for the Fall of 2006.

IT Projects to Support Goal/Objectives:

- Research and present additional e-functionality options for improving payroll and benefit processes.

Efficiently process accurate and timely benefit elections for employees, retirees, Legislators and COBRA members

Objectives:

- Produce accurate and timely benefit reports and electronic eligibility files
- Identify and recommend solutions to improve business processes and system efficiencies
- Assist and train agency personnel in system operations and data management and actively solicit agency input for improvements

Performance Measures:

- Provide eligibility files to third part administrators and benefit vendors in accordance with established deadlines

Bi-weekly benefit eligibility files are distributed to six different third party administrators (health, prescription drug, vision, and flexible spending).

- Meet biweekly with SABHRS staff to discuss data management, benefit processing, and system reporting issues

Each pay day, management from SPD and SABHRS meet to establish/review short and long term work plans, staffing priorities, and benefits eligibility processing issues. In addition, lead production staff from SPD and SABHRS meet bi-weekly to discuss the specific details of eligibility processing issues and options for possible solutions.

- Develop "paperless" benefit enrollment solution

Preliminary analysis has been completed to evaluate the functionality of e-Benefits. Numerous customizations are required to the Peoplesoft delivered e-Benefits product to accomodate specifc plan designs and benefits currently offered by the State of Montana. It is our intent to have an on-line enrollment tool available to employees in the Fall of 2006.

IT Projects to Support Goal/Objectives:

- Support implementation of "paperless" benefit enrollment solution using e-Benefits
- Reduce the number of manual processes and system work-arounds that detract from staff productivity or contribute to overtime efforts

PROFESSIONAL DEVELOPMENT CENTER

The Professional Development Center provides State employees, other government employees, and private sector employees professional development programs and facilitation services utilizing bureau staff and other trained resources

Mission Statement

To offer high-quality, cost-effective training and development programs to state agencies and Montana organizations

Goals:

Maximize revenues through increased class enrollments, additional course offerings, and alternative delivery techniques

Objectives:

- Offer job related courses based on current content, professional delivery, and timely offerings
- Survey clients to determine training needs and competing resources
- Utilize assigned resources effectively and efficiently in the delivery of open-enrollment courses, contracted course offerings, and ancillary services such as meeting facilitation, mediation, curriculum design, and consulting
- Investigate alternative delivery modes including tele/video conferencing, inter/intra net, or other technology based systems
- Maintain website to include training schedules, curriculum outlines, course costs and technology needs

Performance Measures:

- PDC will schedule an average of 25 open enrollment courses each quarter equating to 75% billable time for professional bureau staff

Quarterly Classs Schedules are updated and maintained on the State Personnel Division website: <http://pdc.mt.gov/classinformation.asp>

In this period, PDC scheduled 141 open enrollment courses, an average of 35 per quarter. We conducted 119 of those courses, an average of 30 per quarter. These courses totaled 1,396 hours, 71% of our service hours delivered. The cancellation rate for the year was 16%. At total of 1,625 participants attended. PDC devoted 25% (489 hours) of its service hours to 76 contract courses. A total of 1,358 participants attended. PDC devoted 4% (74 hours) of its service hours

to other services. These included 9 facilitated meetings, and 1 "other" service.

- Establish a Training Advisory Committee to assist in the development, distribution, and analysis of survey efforts during 4th Quarter of 2004

We established the committee and surveyed departments on what types of management training were occurring across state government. The results were reported to the Joint Subcommittee on General Government and Transportation in January 2005.

- Meet with ITSD staff to determine availability, restrictions, and cost of utilizing alternative delivery techniques and report findings to Committee and Administrator during 1st Quarter 2005

PDC has electronically surveyed agencies and employees pertaining to the quality and acceptance of our services. In addition, PDC now allows employees to electronically register for classes.

IT Projects to Support Goal/Objectives:

- Intranet/Internet based survey tools for agencies, employees, and external surveys
- Investigate alternative technology for the delivery of professional development programs (DVD, Internet, MET-NET/VisionNet, etc)
- Offer on-line registration capability for course enrollment

Provide cost/benefit and "white paper" analysis of outsourcing PDC services

Objectives:

- Investigate feasibility of outsourcing PDC services including "white paper" analysis and recommendations

Performance Measures:

- Submit analysis, with recommendations, by the end of the 3rd Quarter 2005

PDC did not have the resources (time and personnel) to complete this objective.

Develop and offer new programs and modify existing course curriculum to meet the needs of agencies and other clientele

Objectives:

- Based on feedback received from the agency survey, design and schedule additional course offerings

Performance Measures:

- Develop curriculum for the following new courses:

Montana Environmental Policy Act: *The interested agency used an outside resource to obtain training.*

Race Relations: *The assigned trainer completed an outline for the workshop but did not conduct it. We determined it wasn't an appropriate topic for open enrollment offering.*

Women Working With Women: *Course curriculum developed and program will be incorporated into core management training and the *Men and Women Working Together* class*

Investigating Complaints: *Completed and conducted in June 2005.*

- Update and revise curriculum on the following existing courses:

Writing Administrative Rules of Montana: *Completed*

Exploring Emotional Intelligence: *Completed*

Discipline Handling Guide: *Completed*

- Coordinate with other SPD bureaus and present three workshops on Workforce Planning for managers in state government

Working with other division bureaus in developing a strategic plan to address workforce and succession planning. To date, eligible retirees have been surveyed on their intent and interests in retiring or remaining employed with the state.

- Sponsor a "Graduate Day" for past participants in Essentials of Management

The event took place on July 12. The training portion of the event covered Workforce Planning.

- Present two sessions of "Legislature 2005" for agency personnel and other interested parties

One session on November 10; two sessions weren't possible because of presenters' schedules

Identify new markets and clients to provide high quality services

Objectives:

- Generate contacts and create interest in PDC services for Organizational Development
- Research possible grants to support specific PDC services
- Focus PDC marketing to other groups and potential clients

Performance Measures:

- Obtain Peace Officer Standards Training (POST) certification for PDC courses
- Contact and promote services to MACo, St. Peter's Hospital, Montana League of Cities and Towns, SAF, and other private/non-profit associations

Performance Measures:

- Obtain Peace Officer Standards Training (POST) certification for PDC courses

We succeeded in getting Dept. of Justice Division of Criminal Investigation to sponsor our courses for POST credit, recognized by the Board of Crime Control. Accreditation took effect on July 1.

Other Accomplishments

1. Training

Right to Know, co-sponsored by Sheriffs & Peace Officers and Montana Association of Counties in Lewistown – Presented this information, along with representatives from the Attorney General's Office and members of the media.

Right to Know, sponsored by Montana Association of Chiefs of Police in Glasgow – Presented this course in April.

Privacy and the Right to Know open courses around the state – Presented the training in Billings, Kalispell, Havre, Missoula, Bozeman, and Lewistown, as well as Helena.

Management Essentials for Department of Revenue – Presented three sessions of this three-day series in March and April.

Creating a Motivating Environment for Travel Montana – Conducted eight sessions of this workshop in eight towns around the state in April, May, and June.

Essentials of Management for Missoula County – Conducted the eight-day series for County managers in May and June.

Management Essentials for Judicial Branch – Conducted this three-day series for Chief Juvenile Probation Officers in June.

Technical Writing and Editing for Dept. of Environmental Quality – Presented three sessions of writing and one of editing in June through September.

Preventing Harassment for Dept. of Commerce – Conducted five sessions of the workshop for Commerce employees in August through October.

Communication Training on Saturdays for ITSD Operators – Conducted seven 2-hour “Saturday Morning Specials” on communication skills, September through December.

Effective Meetings for Dept. of Transportation around the state – Conducted six sessions of the workshop in six cities in October.

Performance Management and Discipline for Missoula County – Presented this two-day session for Public Works managers in December.

2. *Other projects*

Facilitating Negotiated Rule-Making for Land Banking – Continued this six-month project for Department of Natural Resources and Conservation. It involved twice-monthly meetings of a 14-member committee, compiling minutes, and revising draft rules. The State Land Board accepted the committee’s work in June, and the rules were adopted in August with no controversy.

Facilitating Strategic Planning for Richland Housing Authority – Presented this session in Sidney in October.