



MONTANA LEGISLATIVE BRANCH

Legislative Fiscal Division

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Legislative Fiscal Analyst
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DATE: September 5, 2002
TO: Legislative Finance Committee
FROM: Taryn Purdy
RE: Legislative Training

The purpose of this memo is to provide an opportunity for Legislative Finance Committee feedback on proposed legislator training by the Legislative Fiscal Division (LFD).

PREVIOUS TRAINING

There were previously two tiers of training:

- 1) Basic financial and budgeting training provided to all new legislators that served as the grounding for new Senate Finance and House Appropriations Committee members.
- 2) More advanced training for all Senate Finance and House Appropriations Committee members.

The primary issues that arose from this approach was that the basic training was too detailed for the general legislator, and the advanced training was too geared towards new members.

PROPOSED TRAINING PLANS

The division proposes to present training in three tiers.

- 1) Training for all new legislators
 - a. Provided during orientation in November preceding the legislative session
 - b. Duration one hour
 - c. High level training on terms and concepts likely to be encountered and that all legislators need to know
 - d. Subjects covered
 - i. The Legislative Fiscal Division services and products
 - ii. Appropriations and the legislative role and powers (including balancing the budget)
 - iii. Fund types, and how they are different and why they are important
 - iv. Sources of revenue, and avenues and levels of appropriation (HB 2 and cat and dog appropriations)
 - v. Appropriations bills versus bills with fiscal impacts, and fiscal notes

- 2) Training for all new members of House Appropriations and Senate Finance Committees
 - open to any other members
 - a. Provided during the first week of session
 - b. Duration one to two hours
 - c. Subjects covered
 - i. Appropriations and how the budgeting system works (refresher)
 - ii. Fund types (refresher)
 - iii. Subcommittee structure and role
 - iv. HB 2 structure and purpose
 - v. HB 2 through the session
 - vi. Structure of budgets (personal services, etc)
 - vii. Decision packages/present law/new proposals/base
 - viii. Using the budget analysis
- 3) Training for all members of House Appropriations and Senate Finance Committees
 - a. Provided during the first week of session or beginning of second week
 - b. Duration two hours, more if needed
 - c. Subjects covered
 - i. Constitutional basis and requirements
 - ii. Language and other legal issues
 - iii. The interim and how impacted by legislative action and vice versa
 - iv. Companion bill(s) and HB 2 narrative
 - v. General fund status
 - vi. Overview of major issues in all areas by LFD staff (provision of perspective on the entire budget)