



Revenue Interim Committee

68th Montana Legislature

SENATE MEMBERS
BECKY BEARD
GREG HERTZ
SHANNON O'BRIEN
JEREMY TREBAS

HOUSE MEMBERS
LARRY BREWSTER
SHERRY ESSMANN
PAUL FIELDER
MARK THANE

COMMITTEE STAFF
MEGAN MOORE, Lead Staff
JARET COLES, Staff Attorney
LJ JENNINGS, Secretary

AGENDA

Thursday, July 13, 2023

Room 172, State Capitol

Agenda times are approximate. Some items may take more or less time than is indicated.

- 10:00 1. **Call to Order – Roll Call – Introductions of Members and Staff** – Sen. Greg Hertz, Acting Presiding Officer
- 10:15 2. **Administrative Matters** – Megan Moore, Committee staff
- Staff and committee member roles and responsibilities
 - Legislative guidelines for interim committees
 - Proxy voting procedures – Committee action
 - Election of officers – Committee action
 - Committee website tour
 - Summary of Enacted Tax Legislation
- 10:30 3. **Draft Interim Work Plan** – Megan Moore
- Overview and committee considerations
 - Member-proposed study topics
 - Public comment*
 - Committee questions
- 11:15 4. **Agency Monitoring: Montana Tax Appeal Board** – Dave McAlpin, Chair
- Introduction of Board role and members
 - County tax appeal board training update
 - Appeals update
 - Public comment*
- 11:35 5. **Agency Monitoring: Administrative Rule Review** – Jaret Coles, Staff attorney
- Overview of administrative rule review process
 - Administrative rule report
 - Public comment*
- 12:00 **Lunch** (*provided for committee members*)
- 12:30 6. **Modernization and Risk Analysis Committee**
- Opportunities for coordination – Amy Carlson and Josh Poulette, Legislative Fiscal Division
 - Public comment*

- 12:45 7. **Revenue Estimating and Monitoring**
a. FY 2023 General Fund Update – Sam Schaefer, Legislative Fiscal Division
b. Public comment*
- 1:15 8. **Agency Oversight: Department of Revenue** – Brendan Beatty, Director
a. Introduction of staff
b. Rebates and reappraisal
c. Anticipated departmental studies
d. Bill implementation – Tony Zammit and Derek Bell
e. Income tax season update – Jill Hamilton
f. Major case update – Dave Stewart
g. Public comment*
- 2:00 9. **Ballot Measure #2**
a. Overview and status of Ballot Measure #2 – Megan Moore and Jaret Coles
b. Public comment*
- 2:30 10. **Public comment*** on any other topic within the committee’s jurisdiction
- 2:45 11. **Committee Work Session**
a. Work plan decision matrix
b. Adopt meeting dates
c. Adopt interim work plan
- 3:30 12. **Adjourn**

The public may attend the meeting and offer public comment in person in the Capitol or provide public comment either remotely via Zoom or in writing.

To offer public comment via Zoom during the meeting, please submit the [online form for remote participation](#) by **5 p.m. on Wednesday, July 12**. You will receive an email with the login information by midnight the night before the meeting. At the time specified on the agenda for public comment, the presiding officer will call for public comment from people attending in person and people attending via Zoom. The committee may be slightly ahead of or behind the time scheduled for public comment on the agenda.

Written public comment may be submitted either through the [online form for written comment](#) or by sending the comments to Megan Moore, P.O. Box 201706, Helena, MT 59620.

**Public comment provided in person or remotely at a committee meeting is a public record that is videotaped, archived, and available on the Internet. Public comment submitted in writing at a committee meeting is a public record that will be posted to the legislative Web site as part of the minutes log for the committee meeting.*

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