



MONTANA LEGISLATIVE BRANCH

Legislative Fiscal Division

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Director

AMY CARLSON

DATE: June 21, 2024
TO: Legislative Finance Committee
FROM: Susie Lindsay, Lead Fiscal Analyst
RE: Goals and Objectives Report

All agencies were asked to report on the following parameters:

1. **Establish Clear and Measurable Targets:** Clearly outline specific and quantifiable goals and objectives for each program within the agency for the 2025 biennium. Ensure that these targets are precise and align with the agency's overall mission and strategic objectives.
2. **Results Assessment:** Present the current status and results achieved thus far for the established goals and objectives. Utilize relevant metrics and performance indicators to provide a comprehensive overview of the agency's progress.
3. **Key Performance Areas:** Highlight the current status/results in key performance areas, including but not limited to:
 - o *Job Creation:* Detail progress in creating higher-paying jobs, emphasizing the agency's contribution to economic growth
 - o *Regulatory Reduction:* Report on initiatives and outcomes related to reducing regulations within state government
 - o *Customer Service, Accountability, and Efficiency:* Showcase improvements made in enhancing customer service, accountability, and operational efficiency
 - o *Technological Advancements:* Discuss advancements in the State of Montana's technology capabilities and the role of the agency in this progress
4. **Transparent Reporting on Unmet Goals:** If any goals and objectives have not been met, explain the reasons behind the shortfall. Provide insights into the challenges faced and articulate the corrective measures the agency is implementing to address these shortcomings.
5. **Concise Presentation Format:** Ensure that the presentation adheres to a time limit of 20 minutes, allowing ample time for questions and discussions. Keep the content focused, avoiding unnecessary details that may distract from the core message.
6. **Comprehensive Organizational Chart:** Submit a detailed organizational chart that encompasses all agency programs and functional units. Include the total number of Full-Time Equivalents (FTE) and categorize them by source of authority. Provide information on any modified FTE being utilized for a comprehensive understanding of staffing levels.

Below are the Legislative Fiscal Division's (LFD) goals and objectives as stated on the [LFD website](#). Key performance areas are discussed and if goals were not met, an explanation is provided. A comprehensive organizational chart is included at the end of this memo.

The mission of the LFD is to provide non-partisan budget and data analysis to the Montana Legislature, so all lawmakers have objective, accurate, and relevant information to make decisions. The LFD goals are clear and quantifiable and are in keeping with the overall mission of the division. The following provides the specific goals and the quantifiable metrics used to determine if those goals were met.

1. Improve communication with legislators in-person and on the web to better meet the division's mission by:
 - Virtual and in-person outreach to legislators to explain state financial status

Amy Carlson and select analysts traveled to Great Falls, Lewistown, Miles City, Billings, Bozeman, Butte, Kalispell, and Missoula to discuss the 2025 Biennium Legislative Fiscal Report Summary in September and October 2023. Amy Carlson and select analysts also met with Helena area legislators in the same time frame. Great Falls, Missoula and Bozeman had the most attendees, however Kalispell and Helena were also well attended. Areas like Butte, Lewistown, and Miles City had between 0-2 attendees.

- Increasing web usage by increased performance, accessibility, and information

The LFD updated our web products to be more accessible to persons with color blindness. During the 2025 biennium interim period, color blind palates were researched, designed, and incorporated into the interactive dashboards, brochures, and other web-based documents.

During the 2023 biennium, the COVID-19 health emergency necessitated fewer in person experiences. As a result, the website during the 2021 session and 2023 biennium was the main point of contact for legislators and the public. With more people staying home, the website was heavily used for committee hearings and electronic meeting materials. Please refer to the [2021 session web statistics report](#) from that period.

In keeping with transparent reporting of unmet goals, when comparing web usage from the 2023 biennium to the 2025 biennium, data shows a decline in web usage. Please refer to the [2023 session web statistics report](#). This drop in usage is likely attributed to a return to in-person experiences, and an increased reliance on in-person contacts. *While legislators and the public still use the website for materials, the public does not need to rely solely on the website to obtain legislative information. As such, increased web usage was an unmet goal.*

2. Continuously improving the education of legislators through:
 - orientation training

A new website was developed for the November 2022 orientation training documents: <https://leg.mt.gov/information-legislators/orientation/> LFD training materials were included on this website. This offered a one stop experience for legislators. This website was not developed by LFD, but rather the Office of Legislative Information Services (OLIS) staff.

- Various training opportunities during the legislative session

LFD staff provided trainings throughout the 2023 session. Trainings began on January 3 with Director Carlson presenting the financial overview and analysis of the Governor's budget proposal to members of the Joint Subcommittees on House Appropriations and Senate Finance and Claims.

Early morning and lunch trainings were offered each legislative day from January 5 – January 26 on a variety of topics. General fund status sheet trainings were offered on February 23 and 24. During April, training on the general fund status sheet interactive tool for legislators was offered on an as needed basis. In general, topics were well attended during the early days of the session, but as legislators' schedules became busy later trainings were less attended. The general fund status sheet trainings are typically one of the highest attended trainings in any legislative session, often outgrowing the room that the training is held. In the 2023 session, this was also popular likely due to the unusually high availability of unassigned general fund.

- Educational materials

The website has a variety of educational materials on a full range of topics. New this biennium are curated libraries that combine policy research staff expertise and fiscal staff expertise on topics like property tax, school funding, and public safety.

More single page brochures have been added on topics of legislative interest like distributions from marijuana tax and accommodations tax.

- Interactive fiscal products for website integration

This area has seen the most growth. Staff have developed more interactive tools with multiple dashboards. Examples of topics covered are the following: accommodations tax, oil and gas tax, 10 property tax dashboards, and six K-12 school funding dashboards. Much of the information presented in the interactive dashboards is dense and staff is actively working to create introductory tools and tutorials to help with complicated topics.

3. Meeting statutory responsibilities including staffing Interim Budget Committees (six meetings per interim). Minimal data support for policy committees.

The Interim Budget Committees are fully staffed, and six meetings are held each quarter.

The Modernization and Risk Assessment Committee invited the chair and vice chairs from the Revenue Interim Committee, Education Interim Committee, Law and Justice Interim Committee, and Energy and Telecommunications Interim Committee to join them for meetings in Helena, Big Sky, Billings, Colstrip, and Laurel. Fiscal and policy staff provided support for the topics covered.

4. Actively participating with regional and national legislative fiscal officer associations to be on the leading edge of fiscal analytics, trends, emerging issues, and best practices.
 - Joe Triem was appointed as an officer on the National Association of Legislative Fiscal Offices (NALFO). NALFO is one of the nine professional staff associations associated with the National Conference of State Legislatures (NCSL). Joe received stipends that helped cover the cost of attending the meetings.
 - Nick VanBrown was invited to speak at the Fiscal Director's Pre-Conference for the National Conference of State Legislatures (NCSL) Summit, NALFO meetings, and NCSL Fiscal Analyst training conference. Nick co-presented with a representative from Microsoft on Artificial Intelligence (AI) technology. He received two stipends for his speaking engagements. Nick also presented at the State of Montana Data Summit and the Microsoft AI summit in Helena.
 - Julia Hamilton will attend the NALFO meeting in October 2024 to present her Medicaid model. She is utilizing an innovative modeling technique that uses machine learning to identify which of various forecasting methods to apply based on best fit for varying data structures. Through this technique she has been able to forecast at scale around 200 different time series.

- Katie Guenther has been accepted and will attend the upcoming NCSL Legislative Staff Management Institute in August 2024.
 - Walker Hopkins, Julia Hamilton, and Quinn Holzer were invited to an event hosted by NCSL and sponsored by the Pew Charitable Trust in Nashville, Tennessee to discuss public safety and behavioral health issues and tour a center for Substance Abuse and Mental Health Services Administration. Mr. Hopkins and Ms. Hamilton were asked to accompany legislators to Rapid City, South Dakota to tour secure behavioral health campuses like One Heart and Care Campus.
 - LFD leadership participated in the Western States Legislative Fiscal Offices meeting in Salt Lake City in September 2022. Attendees included Amy Carlson, Quinn Holzer, Susie Lindsay, and Nick VanBrown. A similar group will attend a scheduled conference in Washington state in September 2024.
5. Continually invest in staff and develop their non-partisan, independent analytical skills by actively pursuing NCSL and other non-partisan training opportunities
 - Six fiscal analysts were sent to the National Conference of State Legislatures Fiscal Conference in Minneapolis in October 2023.
 - Molly DelCurto attended the 2024 Montana Housing Partnership Conference held in Missoula in May 2024. Speakers included the Federal Reserve Bank of Minneapolis and other important professional contacts.
 - Montana has agreed to be a host state in October 2024 for a NALFO professional staff exchange. This opportunity will bring fiscal staff from other states to shadow MARA staff. A professional exchange facilitates work discussions and increases knowledge.

6. Improve existing and create new internal analytic tools for efficient LFD data analysis.

The LFD data team has improved existing analyst tools and added a few more for staff. These tools allow us to dig deeper and visualize results quicker.

7. Build interactive visualizations for LFC

In May of 2023, members of LFC heard from constituents about increases in their property tax appraised values. The LFC directed staff to create property tax tools that would help them understand the situation better. The staff used the existing property tax tool from previous work with the Modernization and Risk Assessment Committee and expanded the dashboards to include 10 unique ways of visualizing property tax data. Staff offered training in the December 2023 LFC meeting and on multiple occasions for legislators to help them understand the components of the tool. Work is continuing with additional legislative questions on this topic.

8. Stabilize data sets

We have worked in several areas to achieve the goal of stabilizing our data sets. By recruiting a dedicated data engineer, we've bolstered our capacity to clean and access data, increasing speed and reliability. Our collaboration with the executive's Snowflake initiative has also provided us with enhanced access to datasets currently shared by agencies. Additionally, we've established data streams for select existing data sets which has streamlined the use of those and created a process for bringing in additional data sets in an organized and documented manner.

Legislative Fiscal Division current organizational chart. *Staff taking on new roles will have a transition period in which the deputy will perform oversight before the new roles are complete.

