



Montana Legislative Services Division

Office of the Executive Director

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DATE: June 20, 2024
TO: Interim Budget Committee – Section A
FROM: Jerry Howe, Executive Director, Legislative Services
RE: Report: Goals and Objectives

The Legislative Services Division has been requested to report its progress toward achieving the division's 2025 biennium goals and objectives. In making this report, the division was asked to adhere to the following guidelines.

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:
 - *Job Creation:* Detail progress in creating higher-paying jobs, emphasizing the agency's contribution to economic growth
 - *Regulatory Reduction:* Report on initiatives and outcomes related to reducing regulations within state government
 - *Customer Service, Accountability, and Efficiency:* Showcase improvements made in enhancing customer service, accountability, and operational efficiency
 - *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.

The goals and objectives of the Legislative Services Division are clearly outlined below in numerically numbered, bold headings. Result assessments and key performance areas are listed under each goal in bold subheadings. A box with a check mark indicates that the division is on schedule to accomplish the stated goal. A box with an x indicates that the goal is not met, and an explanation for the shortfall is provided. Also, as requested, a comprehensive organizational chart is included.

1. **Encourage the Legislative Council to consider, and where appropriate adopt, practices that promote the best interest of the Legislature.**

Issues Under Consideration by the Legislative Council

Session Information Desk

The Session Information Desk received 20,000 phone calls, 40,000 emails, and 470,000 messages on the Legislature's website during the 2023 Session.

This amount of activity causes two primary challenges.

The first challenge is that employees at the Information Desk are asked a lot of partisan questions about the purpose of certain bills, the interpretation of legislative rules, and the justification for certain floor actions. The Information Desk staff is not equipped to answer partisan questions.

The second challenge is that employees are expected to convert 20,000 phone call messages (live and voice mail) and 40,000 emails into hard copies to be delivered to legislators' desks each session. Sorting, copying, and delivering this volume of information required a substantial effort last session.

In response to the Legislative Council's request to consider options to resolve these two problems, we initiated a Legislative Public Participation software application. This application provides an interface on the redesigned website where the public can provide online testimony, send their written testimony online to legislators, and to send other messages directly to legislators. Additionally, the Legislative Portal allows legislators to view submitted testimony and messages. This website application will bypass the legmt.gov email, making it easier for legislators to manage that email account. Finally, the Information Desk will also have a new and improved interface that allows staff to capture information from callers and walk-in constituents for easier delivery to the Legislator Portal.

MPAN Produced Meetings

The Montana Legislature produces the most technologically advanced video of legislative meetings of any other Legislature. Unfortunately, we can only produce four of these advanced videos at any given time. During legislative sessions, there may be up to fourteen committee meetings occurring at the same time.

This means that ten of the fourteen meetings are recorded with static cameras rather than cameras that can zoom in to the person speaking and staff is unable to provide the name and title of the speaker. Only the four meetings that are recorded with the most advanced cameras and graphics are broadcast on Montana PBS. We refer to these meetings as “produced meetings” All the other, “non-produced” videos may only be viewed on the Legislature’s website.

There is an obvious demand to produce all legislative meetings, but we don’t currently have the equipment, space, or staff to expand the number of produced meetings. The Legislative Council is aware of the issue and is considering whether to expand the Legislature’s capability to produce more committee meetings.

Subcommittee on Legislative Space

The subcommittee on legislative space was created to explore options for legislators to receive more space during legislative sessions. This subcommittee met multiple times before making its recommendations to the Legislative Council.

The Legislative Council eventually adopted a short, medium, and long-range plan. The Legislative Council and the Subcommittee on Legislative Space will continue to meet during the 2025 interim.

When the remodel of the Old Board of Health Building is complete, the majority of the OLIS and Finance staffs will move out of the Capitol. During the 2025 session, a small crew of OLIS and the Financial Office will remain in the Capitol for your convenience, although both offices will be excited to greet you when you’re in the neighborhood.

Subcommittee on Logistics and Appropriations

The subcommittee on logistics was created to explore opportunities to reduce the number of bills and amendments drafted during the next legislative session. The subcommittee met three times, discussed the impact of holding committee meetings on Saturday’s, and a variety of other changes to legislative rules, including the impact of changing the general bill transmittal deadline on the appropriations process. On a vote of 3 to 1, the Subcommittee approved a recommendation to move the general bill transmittal deadline from day 45 to 48, the appropriation bill deadline from 67 to 69, and threshold in the first chamber to \$500,000. The Legislative Council will consider the Subcommittee recommendation at a future meeting.

2. **Review Internal Procedures of the Legislative Services Division.**

Policies Governing Public Information Requests

The Montana Constitution requires that government documents be disclosed on request. To better comply with this law, Legislative Services has recently completed a comprehensive review of its policies governing public information requests. Again, employees of the three staff offices, along with the House and Senate staff, met together to discuss specific policies. The result is a refined policy that saves staff time and better complies with public requests for information.

Policies Governing Legislative Committee Rooms

The Montana Legislature permits use of its legislative committee rooms for a variety of government and private purposes. With open access to committee rooms, it is becoming more of a challenge to protect the technology, furniture, and carpets in these rooms. Recently, employees of the three staff offices, fiscal, audit, and legislative services, along with House and Senate staff, met together to discuss the use of legislative rooms during session and the interim. The result of this collaboration is a more refined policy for interim use of legislative committee rooms. Some of the additions to this policy include preserving room 303 for ceremonial use, limiting room 317 to large groups, and providing a mechanism to charge users for cleaning fees and damage.

Policies Governing Records Retention

The Legislative Services Division is in the process of developing a government records retention schedule to govern the time certain records are kept on file in the Legislative Branch. A draft of this policy, which is being researched and developed by employees of the Legislature's three staff offices, will be presented to the Legislative Council before the end of the 2024 Interim.

Policies Governing ADA Accommodations

Legislative Services has experienced an increase in the number of requests for accommodations at legislative meetings. In response to these requests, employees of the three staff offices, and the House and Senate Sargent's have been asked to research, develop options, and make recommendations for the Legislative Services Division to better coordinate, streamline, and enhance how we make accommodations for the public to attend legislative meetings.

Policies Governing Evacuation, Lockdown, and Shelter in Place

After a bomb threat received by email caused an evacuation of the Capitol, it became apparent that the Legislature's Emergency Action Plan was outdated. The Governor's Office, Secretary of State's Office, the Legislature's three staff Offices, the Secretary of the Senate, and the Clerk of the House all met together to establish a better Emergency Action Plan. The plan was rewritten in a manner that was acceptable to all those staff offices.

Policies Governing the Research Department

The research staff is starting to implement recommendations from its workgroups to improve communication, streamline our workforce, and increase access to and quality of its research offerings.

3. **Redesign Legislature's Website.**

The Legislature's website exists to serve two primary purposes.

The first purpose is to encourage public participation in the legislative process by providing access to legislative information: bills, amendments, agendas, minutes, video recordings of

legislative meetings, access to meeting materials (documents relied upon or reviewed in committee meetings), records of how legislators vote in committee and in their respective chambers.

The second purpose is to help legislators organize and manage all that is expected of them as they serve in this important capacity.

The goal of the Legislature's website must therefore be to assist both the public and individual legislators find, disperse, and manage a wealth of legislative information.

Improve Search Engine

Websites that contain a great deal of information are judged by how easy it is for novice users to access information. No website can meet user expectations without a reliable search engine. With its new design, the Montana Legislature's website will not only be completely searchable, but it will also be redesigned to allow easier access to important information.

Create One Master Calendar

The first thing visitors to the Montana Legislature's website will notice is a universal calendar. This website is about informing the public about what is going on at the Legislature. The universal calendar is the ideal place for anyone to discover what legislative committees are meeting today, this week, and next month. From this calendar, users can access committee meeting agendas, membership, meeting materials, and the date, time, and location of every legislative meeting.

Create Secure Legislative Portal

The Legislative portal exists to assist legislators find, disperse, and manage common tasks and responsibilities. A secure legislative portal is the place where legislators can find tools to help them organize and manage their bill files, receive and respond to public comment about bills and amendments, and submit administrative forms.

New and Improved Bill Lookup

Perhaps the most used tool on the Legislature's website, the bill lookup, allows a user to find any bill or resolution by selecting a session, bill number, or legislator. Users can read or print the exact text of any bill or resolution, find an up-to-date status of the bill, review committee schedules, agendas, and review legislators' votes. With a password protected account, users can also sign up for an email notification so that each time a selected bill is scheduled for a public hearing, the user receives a notification by email.

Create New Committee Pages

One important feature of the new committee pages will be the ability for any user to have simultaneous access to the committee agenda, meeting materials, and a live video of the meeting. With all this information neatly stored on the committee page, any user can easily search for and review any legislative committee agenda, minutes, watch video, or read the documents of any committee meeting, past or present. Users should not be required to fast forward through long videos to find the portion of the video that is of

interest to them. Instead, time stamps in the minutes should take users to the exact place on the video that they want to review. With this new design, legislators will no longer need reams of binders to keep track of committee materials because the website will essentially store an “electronic binder” for every committee meeting.

Create New Pages for the House, Senate, Research, and Financial Offices

Legislative Services was unable to create all these pages this year. These projects are projected to be implemented in the next biennium.

4. **Provide more training opportunities for legislators by increasing the number of staff sponsored educational opportunities.**

Legislative Days

Approved by the Legislative Council and accomplished through a cooperative effort among the three Legislative offices and the House and Senate, Legislative Days is a unique opportunity for all legislators to receive staff presentations about current issues that will likely require policy choices at the upcoming Session. It takes a great deal of coordinated effort to put together a multi-day agenda of this magnitude. Participation in this event is one way that the Legislative Services Division is providing more staff sponsored training opportunities for legislators.

Orientation

This upcoming orientation will be a cooperative effort among the three Legislative offices and the House and Senate. As in the past, however, much of the instruction will come from the fiscal, research, and legal staff.

As you are aware, legislator orientation occurs after the general election in November and before the beginning of the legislative session. Orientation is not limited to only new legislators because much of what is discussed is equally beneficial to all legislators. Also, because the respective caucuses use this occasion to select legislative leaders, all legislators are in Helena. For these reasons, orientation is open to all legislators.

Staff Presentations in interim and special committees

We know that legislators love and appreciate their staff. It is the desire of Legislative Services to serve legislative committees to the best of our ability. Whenever a committee needs information, we hope to be the first office legislators call. Please ask us to make important presentations. We are experts in a variety of issues, and we are uniquely qualified to provide information in a nonpartisan manner.

Financial Office quarterly newsletter

The Financial Office is providing training through a quarterly newsletter that contains important information legislators need to submit reimbursements or interact with the Finance office.

5. **Provide advanced communication training.**

Communication is hard. It doesn't happen naturally, without effort. In an organization like the Montana Legislature, that has been siloed for some time, it can be a struggle to have difficult, uncomfortable conversations. It is important that staff engage in these conversations in a manner that does not alienate one another. During this period of change, when the stakes are high, it is my professional assessment that professional communication training would be valuable.

6. **Improve management skills through training and seminars, including participation in academic and professional associations.**

Legislative Services actively participates in the Council of State Governments (CSG) and the National Conference State Legislatures (NCSL). Both organizations have highly effective staff training programs. In addition to attending some of these training sessions, some of our staff have been invited to participate in leadership roles.

For the first time, we asked some of our staff to apply to the Legislative Staff Management Institute (LSMI). Sponsored by NCSL, this institute competitively selects a class of legislative staff leaders to receive an immersive course in legislative management. To date, two of our staff have completed this training, with one more scheduled to attend this summer.

7. **Improve employee selection and retention.**

Hire the best qualified person for the job

Legislative Services devotes a significant amount of time and effort into hiring the best person for the job, which requires that we not only find someone with the right skills and experience, but also someone who shares the organizations culture and values. With help from Human Resources, Legislative Services casts a broad net when posting job openings. We identify job duties, responsibilities, and objectives, and interview and test qualified candidates. This is not a simple process.

Cross train employees

Legislative Services cross trains employees to ensure that more than one person is proficient in any given job. This is especially critical in the IT Department, but it is also important throughout the entire organization. The Legal Office has maintained two Deputies for precisely this purpose. The Research Office was recently reorganized for this same reason. The Financial Department is exceptionally good at cross training. Cross training allows work to continue whether someone is on vacation, out sick, terminates, wins the lottery, or gets hit by a bus.

The benefits of cross training include:

- Increases staff effectiveness, flexibility, and efficiency.
- Expands employees' knowledge and capabilities.
- Promotes flexibility and enhances teamwork.

- Makes employees feel valued and think higher of themselves and their capabilities at work.
- Leads to more engaged, enthusiastic employees.
- Reveals hidden talents, increases employees' skillsets, and provides a springboard for advancing the goals and objectives of the organization.
- Makes the organization more agile and responsive.

Break down silos.

No wrong door. Legislative Services has made progress eliminating silos between our internal staff offices. We encourage teamwork, cooperation, and communication by expecting employees to be cooperative problem solvers. Legislative Services is also working at the management level to be more cooperative with Audit, Fiscal, House, and Senate. We experience growing pains, as any organization does that is implementing change, but the walls that separate us are coming down.

Competitive Pay

Legislative Services is trying to offer more competitive salaries. In the past, it was our strategy to pay high valued employees well below market. This strategy hurt us when markets began to increase in the years after Covid. We learned from sad experience that it is cheaper for an organization to offer competitive pay than it is to hire below market, train employees until they are proficient, only to have them leave the organization because we cannot pay market rates.

When this happens, time spent recruiting, hiring, and training replacements is time that we don't spend working towards our goals and objectives. To be clear, competitive pay does not eliminate turnover. But competitive pay, combined with a retention program, helps keep turnover in check and gives us a fighting chance to accomplish our goals and objectives.

I look forward to continue working with the Legislative Council and Section A to develop budgets that allow Legislative Services to better retain high value employees.

☒ 8. Implement Digital First Challenge

The governor issued a digital first challenge to state agencies requesting that technology be used to eliminate manual and paper processes. Although the Legislature is deeply committed to traditional processes, but the redesign of the Legislature's website, for example, creates electronic processes for those who prefer them. It is not the intent of Legislative Services to require paper processes for those who prefer electronic ones, nor is it our intent to require electronic processes for those who prefer paper. Although it may feel to some legislators that we have moved the cheese, the governor is probably not that impressed.



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LEGISLATIVE SERVICES DIVISION FTE (88.17)

Funding Source HB2 Program 20

1 modified Attorney, 2 modified Technical Administrators/Network Administrator

FTE (1)
1 Executive Director

Legal Services Office

FTE (20.67)
1 Director
2 Deputies
7.5 Attorneys
5 Editors
5.17 Session Staff
1 modified Attorney

Office of Research & Policy Analysis/ Legislative Environmental Policy

FTE (20.5)
1 Director
2 Deputies
1 Legislative
Environmental Analyst
9 Research Analysts
1 Data Analyst
2 Research Assistants
4.5 Administrative
Support
1 Administrative Support
(Program 21)

Office of Legislative Information Services

FTE (39)
1 Director
4 IT Managers
1 Security
9 Software Engineers
6 Business Analysts
1 AV Analyst
1 Webmaster
1 Publications
5 Systems Engineer
1 Database Administrator
4 Network Administrators
3 IT Support
2 RMC
2 modified Technical
Administrator/Network
Administrator

Financial Office

FTE (6)
1 Director
1 Budget Analyst
1 Business Coordinator
3 Accounting/Payroll

Human Resources

FTE (1)
1 Director

