

# Montana Secretary of State

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Section A Interim Budget Committee Meeting

March 13, 2024

Angela Nunn, Chief Deputy

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**CHRISTI JACOBSEN**  
MONTANA SECRETARY OF STATE

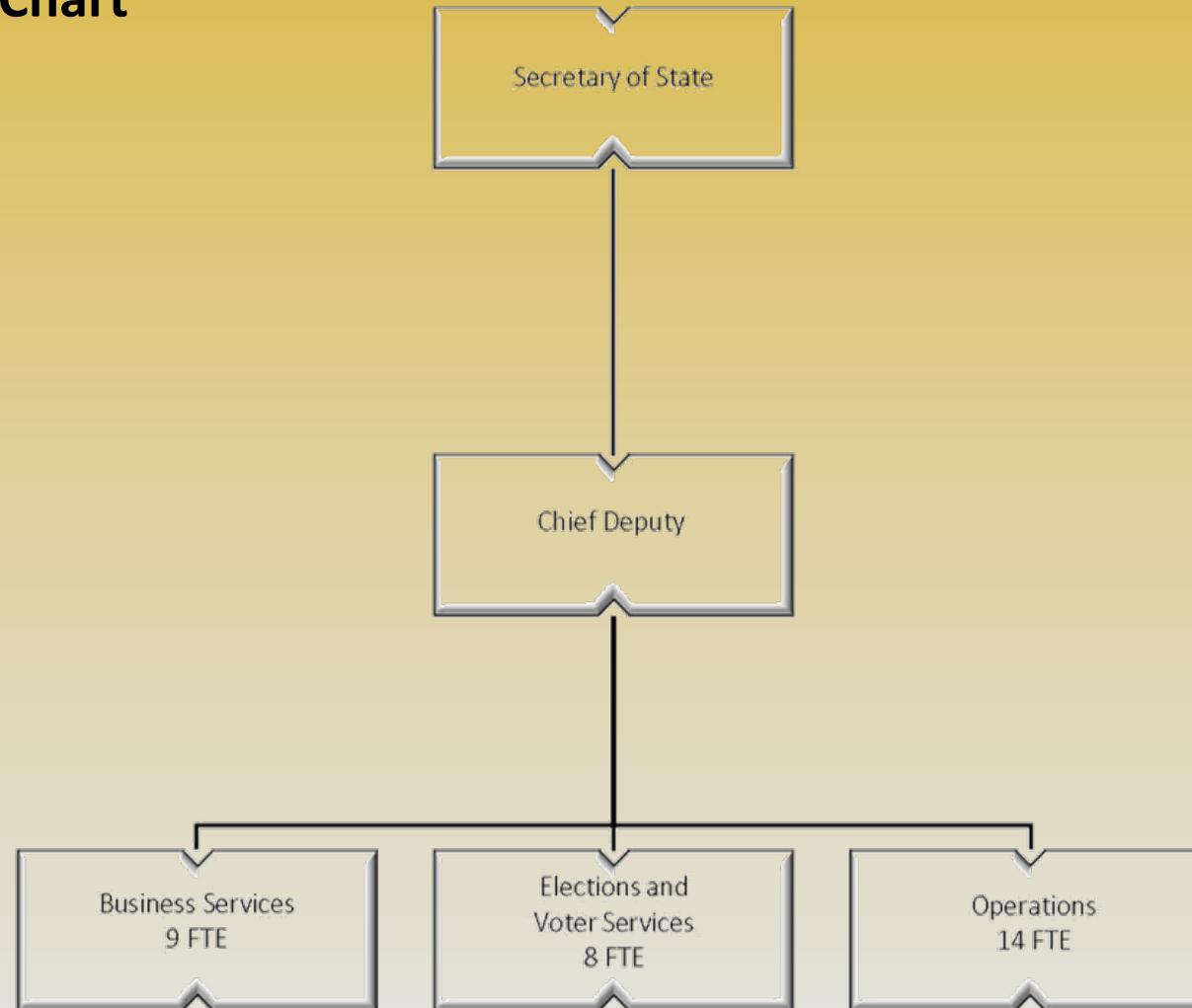
"The Mission of the Office of the Secretary of State is to protect the integrity of elections, be an asset to businesses, and preserve official history."



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# Montana Secretary of State Organizational Chart



Filled Positions: 33

Vacant Positions: 10

Source of Authority: Proprietary



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# Overview of Strategic Initiatives



Recruit, develop, and retain a highly engaged workforce to serve the citizens of Montana.



Complete planned post launch development of the new voter registration management system to successfully support the upcoming 2024 primary and general election.



Successfully develop and launch a replacement system for the Montana Administrative Register and the Administrative Rules of Montana.



Enhance the experience Montana Businesses have when interacting with the Secretary of State's Office.



Conduct public outreach to communicate relevant information to the voters and business community.





# Recruit, develop, and retain a highly engaged workforce to serve the citizens of Montana

## Operational Objectives:

- Attract and retain a high-quality workforce
- Conduct employee engagement surveys and stay interviews
- Provide professional development and cross-training opportunities
- Provide regular performance appraisals

## Key Performance Measurements/Statistics:

- 91% highly engaged workforce
- 64% of staff have been with SOS over 5 years
- 6% turnover rate in 2023 (2 retirements)
- 70% of staff are cross-trained for succession planning
- 100% completion of performance appraisals

**"I absolutely love my job. I can't say enough about my experience as an employee with this organization. I am proud to be part of it, motivated, treated exceptionally well and HAPPY! I've never experienced this type of satisfaction at a job before, even jobs I have enjoyed. The SOS Office is doing something right!"**





# Complete planned post launch development of the new voter registration management system to successfully support the upcoming 2024 primary and general election

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## Operational Objectives:

- Prioritize outstanding deliverables and complete development and testing
- Consistent communication with vendor and Election Administrator partners
- Provide training, resources, and support to the Election Administrators

## Key Performance Measurements/Statistics:

- 2 deliverables remain – anticipate a March project close-out
- Meet with vendor twice a day; monthly leadership meeting
- Election Administrator town halls; Election Administrator Conference; in-person visits
- ElectMT User Manual, ticketing system, phone support, and ad hoc meetings for support/general questions

**"Learned a lot in training and had a great time. The materials and panels were very well thought out and I learned a lot. Topics and speakers were invaluable. All around top notch!"**





# Successfully develop and launch a replacement system for the Montana Administrative Register and the Administrative Rules of Montana

## Operational Objectives:

- Identify system requirements for process improvement
- Eliminate redundancies and bureaucracy
- System development and testing
- Conduct user training
- Resource creation to support end-users post launch

## Key Performance Measurements/Statistics:

- Weekly vendor meetings
- Milestone 1 through 5 testing
- External site planned Go Live in June 2024
- MAPA Administrative Rule overhaul – proposed reduction of 33 unnecessary rules

**"Thank you for everything you do! I want you to know that your expertise and assistance with the editing and overall rulemaking process is invaluable!"**



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# Enhance the experience Montana Businesses have when interacting with the Secretary of State's Office

## Operational Objectives:

- Eliminate, reduce and waive fees
- Provide the best customer service to our businesses
- Ensure Business Enterprise System is user friendly
- Conduct outreach through various mediums

## Key Performance Measurements/Statistics:

- Cut filing fees in half for all Montana Businesses (effective July 2022)
  - Saved Montana Businesses over \$2 million as of December 2023
- Waived Annual Report filing fee for 2024
  - Already saved businesses over \$2.6 million (48% filed)
- Answered phone calls, assisted walk-in customers, sent emails, mailings, and provided presentations to various groups in the business community
- Completed several Business Filing System enhancements

"I just want to say "thank-you" for removing the filing fee for 2024. I think this action sends a positive message for those who have a business in MT. I realize it wasn't a high fee, but the fact that it was removed is 'most welcome.' Thanks so much! Also, thank you for making the filing report 'user friendly' - everything correctly filled in for me. I am 71 and not very tech savvy, but this was easy peasy for me! Thanks again. Keep up the good work."



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# Enhance the experience Montana Businesses have when interacting with the Secretary of State's Office (Continued)

## Customer Feedback:

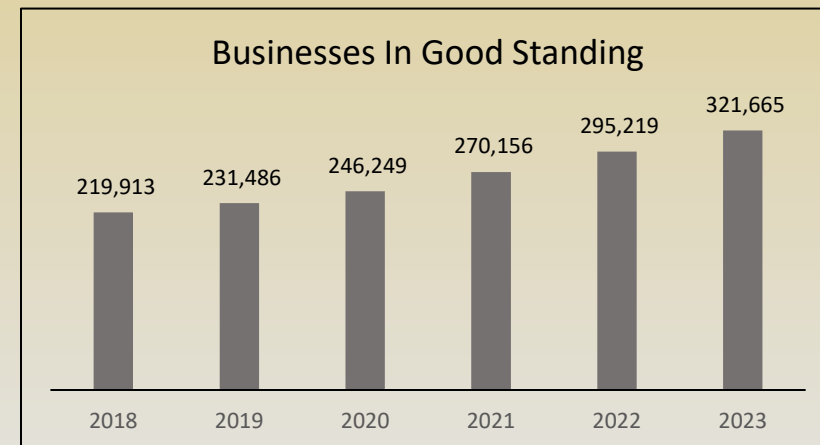
"THIS WAS THE EASIEST, LEAST CONFUSING, MOST USER FRIENDLY report that I ever filed in about 20 years. You and your office is to be congratulated for making this yearly task so easy and friendly. Please accept my Thanks for a Job Well Done for you and your staff."

"You were so accommodating, friendly, knowledgeable, efficient, and within minutes, you emailed the necessary documents needed. A big thank you for a great job done!"

"Julie is SO professional and kind, she walked me through it in just minutes, she was patient while I entered my info, she knew every screen, told me where, what to look for, Julie is the epitome of the perfect representative. Every single thing I called for was taken care of in about 10 or 12 minutes, that is service!"

"Laura did a fantastic job taking me step by step all the way to the end of the process of getting a new password and amending my LLC. I appreciate the ability to call your office and speak to a live individual. I love how Montanans are so personable."

"The experience of calling to ask questions of the Business Services Division has been amazing, kudos to the entire team!"





# Conduct public outreach to communicate relevant information to the voters and business community

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## Operational Objectives:

- Outreach efforts through various mediums
- Distribution of Montana and US Constitutions
- Website Enhancements
- Create Educational Resources
- Attend events

## Key Performance Measurements/Statistics:

- Approximately 1 million interactions with MT businesses through postcard and email outreach
- Public service announcements
- Millions of page views
- Approximately 8,000 Constitutions distributed to schools and the public
- Election educational video series – release Spring 2024

**"Whoever designed the SOS website did a great job. As somebody who visits every SOS website for every state, Montana is by far the best interface and is very pretty on the eye."**



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# Thank You!

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