

Legislative Services Division Succession Planning Efforts to Date
Prepared for the Legislative Council Succession Planning Subcommittee
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1. **Additional staff** to accomplish multiple goals:

a. to provide for additional bill drafting capability with the retirement of a prolific bill drafter;

b. to create a "bench" of new staffers to support the areas of revenue and finance including school funding and support of the Revenue and Transportation Interim Committee, the Taxation Standing Committees, the Legislative Finance Committee, House Appropriations, and Senate Finance and Claims. This will also help to support the revenue estimating function. Although there are no retirements announced in this area, all of the staffers have longevity and will be able to retire in the next 5 years. This provides an opportunity to train and share knowledge prior to actual retirements and to enhance legislative capabilities.

c. to support the Environmental Quality Council (EQC) and its staff with legal support. The Environmental Policy Analyst is also an attorney and has been the lead staff for EQC and legal support for other natural-resource oriented committees. Hiring an attorney to work in this area will assist with voids left from retirement and dual roles by other staffers.

Additional staff include:

- 2 new full-time equivalent (FTE) employees granted by 2009 Legislature - An attorney and a research analyst are being hired: both in area of revenue, taxation, budgeting, and finance backgrounds
- 1 existing FTE converted from Indexer position to attorney: assigned to natural resources-related committees

2. **Reallocation of duties.** With the impending retirement of the Legal Services Manager/Code Commissioner, the following have been or are being considered for implementation:

- 3 new bill drafters added to the staff (2 attorneys, 1 research analyst)
- all attorneys doing legal opinions for their respective areas
- executive director assigning bill draft requests
- will seek appointment of an Assistant Code Commissioner by the Legislative Council for an interim period until the new Legal Services Manager is hired and completes one round of session, code update, annotations, etc.

One area for which transition plans are not completed is the staffer for the Rules Committee. The Council Rules Subcommittee or Succession Planning Subcommittee, or both, may want to have that discussion. Options include selecting or recruiting a staff member to work with Greg and the Subcommittee while the Rules are being discussed and reworked. This staffer could also take the various Rules Training materials that we have compiled over the years and prepare a comprehensive handbook for the staff. Staff and legislator training could be held throughout the interim before Greg leaves.

3. **IT planning and reorganization** resulted in additional system analyst and a Request For Proposals (RFP) to assist in projects related to succession planning. The projects that are in progress are:

a. Documentation of Legislative Fiscal Division (LFD) systems - many systems have been developed and supported by a power user, are not completely documented, and only peripherally supported by Legislative Services Division (LSD) Office of Information Technology (IT). In anticipation of potential retirements and moving the IT-support functions completely to LSD, the system analyst will be dedicated to LFD and partner with the revenue analysts and a new budget analyst that will be hired by LFD. The documentation of current systems and business processes will allow LSD to support the current and future needs of the Legislative Fiscal Division and provide for transmission of knowledge to new staffers and to the IT office.

b. A RFP is being let to analyze business process and system requirements for bill drafting, processing, and publications system. These legacy computer systems used to support the operations of the biennial legislative sessions. Some of these systems are nearing obsolescence. Others are operationally stable, but are based on designs that are at least 10 years old (and some much older). All of these systems have been kept operationally viable, and to the extent feasible have been updated to meet changing needs. In addition, many of the staff that have developed, operate, or support the systems are nearing retirement and the analysis will capture that knowledge for use into the future. It should also assist in the easier transmission of knowledge and use of session systems by temporary session House and Senate staff. This RFP also includes processes to support the appropriations bills and revenue estimating resolution creation that are created and supported by both LFD and LSD.

The core legislative session and post-session support systems are: bill drafting, bills processing (engrossing and enrolling), appropriations and revenue bills creation, journal creation, committee minutes, audio/video streaming and archiving, bill status, public access to almost all session related information, agendas preparation, vote systems, code update (codification), session publications, camera ready for print, Montana Code Annotated (MCA) online, MCA on CD ROM, annotations update.

4. In 2007, the Legislature passed legislation for a **legislative branch retirement termination reserve account**. (5-11-120, MCA) This statutorily appropriated account assists to mitigate the impact of senior staff leaving and the associated payout of annual leave, sick leave, and comp time. It allows for filling the position sooner and not having to wait to accrue vacancy savings.

The money in the account is statutorily appropriated to the legislative services division to be used only for staff retirement termination pay in the legislative branch. The money in the account may be expended only with the approval of the appropriate branch division director for eligible termination pay expenditures for division staff. Currently, there is \$330,000 in the account for the biennium. With 2 known retirements, this account will be reduced by approximately \$200,000. Any additional retirements will need to be funded through the balance and or existing personnel budgets. The 2009 Legislature declined to put additional funds in the account. The division directors will calculate the potential need prior to next session to develop any budget proposals that may be needed.

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