

Cumulative Summary of Strategic Planning Session Topics Since 2003

2015-16 Interim

- Executive Branch Agency oversight and administrative rules, term limits, budget training, legislator and staff pay, post-transmittal training, more communication on interim work and bill packages.
- TVMT: survey, 5-minute clips, more programming, less dead time, remote testimony.

Communications and Outreach

- 2015-16 -- Use TVMT and YouTube to have a comprehensive education program about the Legislature and extend the reach of TVMT to cover more meetings and consider more programming.
- 2007-08 – Need for feedback to legislators and assistance from Information Office (December 2007 Survey in The Interim, back page article by ED), ideas for DVDs on topics for legislators (one made on bill drafting), synopsis of LC discussions, weekly legislative report.
- 2007-08 – TVMT: seek expansion into greater areas, TVMT Subcommittee (2007 session to Helena and 7 largest communities through Bresnan and 18 others through telecoms). 2009 Session used satellite transmission to 46 communities, RFP July 2009 resulted in satellite transmission contract and channel on cable outside of Helena.
- 2003-04, 2005-06 – Promote TVMT, desire to provide for statewide expansion of TVMT distribution (from 1 full-time channel (Helena) and 7 part-time channels in 2003).
- 2005-06 – Idea for televised program about Montana Legislature to inform the public about the role of the Legislature.
- 2003-04 – Improve websites, identify low-cost ways.

Restore faith and trust in Legislative Branch and civic education

- 2013-14 -- Idea for pilot road show/town hall meetings, “Life in the Legislature”, stakeholder comment on term limits, annual/biennial sessions. Use interim committees for more civic education, field hearings, and listening sessions/open houses.
- 2013-14 -- Possibilities for TVMT and social media (5-minute spots created in 2016 and currently on legislative website).
- 2003-04, 2007-08 – Need to impress members to speak in positive matter about legislature.
- 2007-08 – Decorum on floor and in committee hearings, providing public more access. Resulted in more audio/video ports in House and Senate for media, media training and handbook.
- 2003-04, 2005-06 – Increase public awareness of legislative issues, create a position to conduct and coordinate public outreach (resulted in approval of 1 FTE for LIO, hired in October 2007).

Orientation and training

- 2015-16 - Post-transmittal training combining policy and budget: House, Senate and Appropriation committees.
- 2013-14 – Additional training for chairs and training on Rules, Ethics, Budgets in December, 2014.
- 2009-10 -- Improve legislator training and relationships, suggested mentor teams, social events, more training early in session (in 2013, used the first week to provide topical training; in 2015 and 2016, used the first week for standing committees to provide more training).
- 2007-08 – Identify more need for opportunities for legislators to come together using caucus and orientation week, early session leadership meetings, explore interim opportunities, enhance training opportunities and refreshers; 2008 orientation opened to all legislators from just first-year legislators.

- 2007-08 – Added issue caucuses during orientation – not well attended and would need revision, Education and Local Government Interim Committee held an educational summit on the first Saturday.
- 2007-08 – Chair and vice chair training – first held Nov. 2008, continues.
- 2007-08 – Open caucus training – agenda item and discussion (Jan, 2008).
- 2003-04, 2005-06 – Create mentoring program for legislators (no direct action, created mentor groups in orientation).
- 2003-04, 2005-06 – Increase training for legislators; 2009 - First time budgets and dues were adopted for NCSL, CSG.
- Law School for Legislators since 2005; Rules Workshops since 2004; New Legislator Orientation since 2004; Chairman Orientation since 2006.
- 2003-04 – Provided Rules Training (since 2004).

Leadership training

- 2013 – Introductory breakfast for outgoing and incoming leaders; 2013 -- Directors working with governor and chief of staff to assist in successful session.
- 2010 – First leadership training, different for each session.
- 2009-10 - Leadership notebook prepared for leaders (ongoing).
- 2009-10 – Suggested transition meeting of outgoing and incoming leaders.

Legislative Calendar

- 2013-14 interim produced reports on “Goals for a Legislative Calendar”, four reports on annual sessions, and a notebook on “A study of other Legislatures”.
- 2011-12 – Legislators liked 10-day recess period for HB 2 in 2011 – no similar action in 2013 or beyond (2013, no HB 2 conference committee).
- 2011-12 – Provided more information about what was needed to meet transmittal deadlines to chairs, session staff.
- 2007-08 – Term limits, annual sessions were discussed.

Rules

- 2013-14 Rules Subcommittee – Recommended changes, some adopted.
- 2009-10 – Suggested LC rules subcommittee, repeated each interim.
- 2009-10 – Created searchable database, reference guides for floor action, included more cross-references.
- 2007-08 – Subcommittee for rules review and rewrite

Staff support for legislators

- 2009-10 – Identified the need for interdivisional staff teams.
- Staff guide for 2011 and subsequent Legislatures published. Since 2011, mentor teams with staff from all divisions are part of Legislator Orientation.
- Ongoing efforts to have interdivisional staff teams during interim and session.

Bill drafts

- 2011-12 - Timing – legislators wanted bigger bills earlier: Additional training opportunity for caucus leaders to talk to caucuses.

- 2011-12 - Tools to help leaders identify multiple bills on same topics.
- 2005-06 – Examined fiscal note process (2007 legislation unsuccessful; 2009, SB 18 successful).
- 2003-04 – Educate legislators on costs of drafting bills – since 2004, orientation covers process and staff resources involved.

Permanent House and Senate staff

- 2011-12 – discussion regarding permanent staff for house and senate. LC bill introduced in 2015 (HB 251) was unsuccessful.
- 2015 President and Speaker authorized one staff member each to be present throughout interim.
- 2017 Speaker continued to authorize Chief Clerk part-time throughout interim. Has raised insurance and leave benefits questions from Dept. of Administration and may have some budgetary effect.

Legislative Compensation

- 2015 passed and implemented in July 2017, constituent services allowance, subsuming tech allowance.
- 2015-16 – State to provide computers/tablets instead of stipends, standardized the computers (no action – expanded stipend 2015)
- 2015-16 - Study legislator and legislative staff pay (Blue Ribbon Commission).
- 2011-12 – Recommend Governor/OBPP to split into separate bills, the pay plan and any changes to pay plan statutes (2013 - added section in pay plan on intent and how to implement pay plan).
- 2011-12 – Support of use of various devices discussed. Included in legislator orientation, provide list of supported devices and contracted services for other devices and trouble-shooting.
- 2007-08 – Increase pay, stipend, (reviewed past legislation ('07), other states' processes).
- 2005-06 - \$225,000 funding in 2007 session for laptops for legislators (IT allowance), continue Computer System Reserve Account (2008 – replaced vote systems, since used for SSR, and TVMT).

Interim committee improvement

- 2009-10 – More training during interim, held March 2010 budget training, various ideas to use interim more effectively, no institutional changes, various interim committees have tried more field meetings.
- 2007-08 – Consider interim committee field meetings, monitor budgets, adopt policy parameters
- 2005-06 – Increase legislator participation in interim committees; 2007 – first attempt to separate Education and Local Government Committee – successful in 2017; two additional committees created – Water Policy and Fire Suppression -- in addition, two study bills and a mental health study appropriation (contracted).

Legislative space and related issues (i.e., parking, media space)

- 2009-10 – Authorized space analysis, final recommendation for additional building and parking garage, resulted in a 2011 appropriation for HVAC improvement in the Capitol Building.
- 2009-10 – Explored the possibility of a parking shuttle (successfully implemented in the 2015 and 2017 sessions in conjunction with Department of Administration and the City of Helena/Capitol Transit).
- 2009-10 – LC proposed and passed rule changes regarding media guidelines and the process for media credentialing, and staff-instituted media training.

Standing committees and business processes

- 2011-12 – Desire to work on business process for standing committee votes to be more accessible to legislators and public. Resulted in better training of session committee secretaries and 2011 business report so votes were posted more quickly. Current (2017) phase of the SSR will complete a

Committee Module that will allow for automated recording of votes by session committee secretaries and upon review, immediate posting of minutes with votes to the web.

- 2011-12 – Proxies: provided research to leaders on numbers on committees related to member appointments, training for presiding officers to announce why proxies are needed.
- 2011-12 – Recommended additional committee chair training regarding presentation of amendments with enough time for public to comment.

Session caucus costs

- In 2013, proposed having separate postage budgets. In 2015 and 2017 reverted back to informal, separate budgets to allow more flexibility. In 2017, minority caucuses bought own bulk mailing permits.
- 2011-12 – Suggested separate budgets for leaders for projects (not the same as leadership budget).
- 2011-12 – Expanded legislator technology allowance to allow cell phones.

Legal review of bill drafts

- Constitutional issues had always been noted in junque files. New process in 2013 – new use of protocol with requester, set format, and posting to web like a fiscal note.
- LC review in 2015 – no change for 2015, 2017 sessions, some committees included in bill folder with bill.

Session systems replacement process

Appropriation vetoed in 2011 (HB 5), successful in 2013 (HB 10). SSR projects completed to date: MCA database conversion to XML, Annotations, Bill Drafting Request System, and modules completed. Codification is being used, entire process will be completed in the Fall of 2017, and improvements will be made. Bill drafting system is in design process and committees system is being developed currently. Future projects may be chamber processes.

Legislative Security

2011-12 – Since 2013, appropriation included in HB 2 to pay for full-time officer from Helena Police Department to be present in the Capitol Building and on the complex. Funded one officer for interim through MOU with Department of Administration and ensures two officers in Capitol Building during session.

Succession planning

- 2009-10 – Monitored LSD succession planning and PA on ED.
- 2007-08 – No bench in research, legal, space issues. Added 2 FTEs, each to LSD and LFD for additional resources and ability to train prior to replacement. Discussed concept of pursuing code update/drafting process (in process since 2015). Training and manuals being developed to capture institutional knowledge. Legal opinions catalogued.
- 2005-06 – Developed plan for staff transition, established Retirement Reserve Account for leave liability (5-11-120, MCA), currently no balance.

Revenue estimate

- 2013 -- Rule adopted and Senate introduced SJ 2.
- 2015 -- Rule reverted to pre-2013 and process has remained since.

Medicaid estimate

- 2011-12 – Issue raised regarding joint revenue estimating process with ED.
- 2013-14 and 2015-16 – LFD refined legislative estimate process.