

WORK PLAN

2025-2026 STATE ADMINISTRATION AND VETERANS' AFFAIRS INTERIM COMMITTEE



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COMMITTEE WEBSITE

<https://committees.legmt.gov/#/nonStandingCommittees/3?tab=Details>

INTRODUCTION & PURPOSE

PURPOSE OF DRAFT WORK PLAN

This work plan details the State Administration and Veterans' Affairs (SAVA) Interim Committee's study and agency oversight duties for the interim, which runs from July 1, 2025, through September 15, 2026. The adopted work plan reflects the Committee's priorities, as indicated by the amount of time the Committee decided to spend on each of its tasks. Staff uses the work plan to undertake research and arrange presentations related to the Committee's studies and other duties. Stakeholders and other members of the public use the work plan to track various study topics and other items of interest throughout the interim. The work plan is intended to be a fluid document, subject to change during the interim as questions and topics arise and committee decisions are made.

COMMITTEE PROCEDURES AND PUBLIC PARTICIPATION

The State Administration and Veterans' Affairs (SAVA) Interim Committee will operate under the Rules, Procedures, and Guidelines for Interim Committees adopted by the Legislative Council. As required by law, 10-day advance public notice will be given for all meetings and the public will be given an opportunity to comment on any matter that is within the jurisdiction of the committee. The presiding officer may establish time limits for public comments, if necessary. Agendas, memos, links, and other information can be found on the SAVA website: <https://committees.legmt.gov/#/nonStandingCommittees/3>.

| COMMITTEE DECISION |
|--|
| The committee voted 5-3 to allow the use of proxies for the interim. |

STATE ADMINISTRATION AND VETERANS' AFFAIRS INTERIM COMMITTEE STATUTORY DUTIES

OVERVIEW

The State Administration and Veterans' Affairs Interim Committee draws its statutory responsibilities from the sources identified below. As applied to SAVA, statute requires the committee to:

1. **Conduct interim studies** as assigned. The committee may recommend to the Legislative Council that a study be assigned to another committee or not be conducted.
2. **Review administrative rules** of the Department of Administration, the Public Employees' Retirement Board, the Teachers' Retirement System Board, the Department of Military Affairs, the Montana Veterans' Affairs Division, the Office of the Secretary of State, and the Commissioner of Political Practices.
3. **Review the statutorily established advisory councils and required reports** of assigned agencies to make recommendations to the next legislature on retention or elimination of any advisory council or required reports (*required only if requested by a member of the interim committee*).
4. **Review legislation** proposed by the Department of Administration, the Public Employees' Retirement Board, the Teachers' Retirement System Board, the Department of Military Affairs, the Montana Veterans' Affairs Division, the Office of the Secretary of State, and the Commissioner of Political Practices. Bills requested by an individual member of the Legislature are not subject to this requirement.
5. **Review proposed statewide initiatives** within the interim committee's subject area and vote to either support or not support the placement of the test of a proposed statewide initiative on the ballot.
6. **Complete additional statutory duties** including oversight of the statewide public pension systems.
7. **Monitor the operation** of the Department of Administration, the Public Employees' Retirement Board, the Teachers' Retirement System Board, the Department of Military Affairs, the Montana Veterans' Affairs Division, the Office of the Secretary of State, and the Commissioner of Political Practices with specific attention to the following:
 - a. identification of issues likely to require future legislative attention;
 - b. opportunities to improve existing law through the analysis of problems; and
 - c. the experiences of Montana's citizens with the agency and whether these experiences may be amenable to improvement through legislative action.
8. **Prepare bills and resolutions** that, in the committee's opinion, the welfare of the state may require for presentation to the next regular legislative session. An interim committee may, by vote, request five bill drafts on a partisan basis and an unlimited number of bill drafts on a bipartisan basis.

GENERAL DUTIES FOR ALL INTERIM COMMITTEES

5-5-215. Duties of interim committees.

1. Each interim committee shall:
 - a. review administrative rules within its jurisdiction;
 - b. subject to 5-5-217(3), conduct interim studies as assigned;
 - c. monitor the operation of assigned executive branch agencies with specific attention to the following:
 - i. identification of issues likely to require future legislative attention;
 - ii. opportunities to improve existing law through the analysis of problems experienced with the application of the law by an agency; and
 - iii. experiences of the state's citizens with the operation of an agency that may be amenable to improvement through legislative action;

- d. review, if requested by any member of the interim committee, the statutorily established advisory councils and required reports of assigned agencies to make recommendations to the next legislature on retention or elimination of any advisory council or required reports pursuant to 5-11-210;
 - e. review proposed legislation of assigned agencies or entities as provided in the joint legislative rules;
 - f. accumulate, compile, analyze, and furnish information bearing upon its assignment and relevant to existing or prospective legislation as it determines, on its own initiative, to be pertinent to the adequate completion of its work; and
 - g. review proposed statewide initiatives as defined in 13-27-110 within the interim committee's subject area and vote to either support or not support the placement of the text of the proposed statewide initiative on the ballot in accordance with 13-27-228.
2. Each interim committee shall prepare bills and resolutions that, in its opinion, the welfare of the state may require for presentation to the next regular session of the legislature. An interim committee may by vote request five bill drafts on a partisan basis and an unlimited number of bill drafts on a bipartisan basis.
 3. The legislative services division shall keep accurate records of the activities and proceedings of each interim committee.
 4. As used in this section:
 - a. "bipartisan basis" means a vote in which members from more than one party vote to request a bill draft; and
 - b. "partisan basis" means a vote in which members from only the majority party vote to request a bill draft.

STATE ADMINISTRATION AND VETERANS' AFFAIRS INTERIM COMMITTEE DUTIES

5-5-228. State administration and veterans' affairs interim committee.

1. The state administration and veterans' affairs interim committee has administrative rule review, draft legislation review, program evaluation, and monitoring functions for the public employee retirement plans and for the following executive branch agencies and, unless otherwise assigned by law, the entities attached to the agencies for administrative purposes:
 - a. department of administration, except:
 - i. the state compensation insurance fund provided for in 39-71-2313, including the board of directors of the state compensation insurance fund established in 2-15-1019;
 - ii. the Montana tax appeal board established in 2-15-1015;
 - iii. the division of banking and financial institutions; and
 - iv. the office of state public defender;
 - b. department of military affairs; and
 - c. office of the secretary of state.
2. The committee shall:
 - a. consider the actuarial and fiscal soundness of the state's public employee retirement systems, based on reports from the teachers' retirement board, the public employees' retirement board, and the board of investments, and study and evaluate the equity and benefit structure of the state's public employee retirement systems;
 - b. establish principles of sound fiscal and public policy as guidelines;
 - c. as necessary, develop legislation to keep the retirement systems consistent with sound policy principles; and

- d. publish, for legislators' use, information on the public employee retirement systems that the committee considers will be valuable to legislators when considering retirement legislation.
- 3. The committee may:
 - a. specify the date by which retirement board proposals affecting a retirement system must be submitted to the committee for the review pursuant to subsection (1); and
 - b. request personnel from state agencies, including boards, political subdivisions, and the state public employee retirement systems, to furnish any information and render any assistance that the committee may request.

AGENCY MONITORING

AGENCIES

Pursuant to 5-5-228, MCA, the State Administration and Veterans' Affairs Interim Committee has administrative rule review, draft legislation review, program evaluation, and monitoring functions for the following executive branch agencies and, unless otherwise assigned by law, the entities attached to the agencies for administrative purposes:

- **The Department of Administration (DOA)** and the following administratively attached entities and boards, councils, and commissions:
 - **Public Employees' Retirement Board (PERB / MPERA)**
 - **Teachers' Retirement Board (TRS)**
 - State Lottery Commission
 - Advisory Council on Workforce Development and Planning
 - Board of Examiners
 - Burial Preservation Board
 - Capitol Complex Advisory Council
 - Information Technology Board
 - Information Technology Managers Council
 - Montana Information Security Advisory Council
 - State Banking Board
 - State Employee Charitable Giving Campaign Advisory Council
 - State Employee Group Benefits Advisory Council
 - Employee Investment Advisory Council
- **The Department of Military Affairs (DMA)** and the following administratively attached entities:
 - **Montana Veterans' Affairs Division (MVAD)**
 - Board of Veterans' Affairs
- **The Office of the Secretary of State (SOS)** and the following administratively attached entities:
 - **Office of Commissioner of Political Practices (COPP)**
 - Board of State Canvassers

ADMINISTRATIVE RULE REVIEW

Interim committees are required to review administrative rule proposals for the agencies for which they have oversight responsibility. The committee's legislative attorney reviews rulemaking notices and provides regular updates, noting any rules that may be out of compliance with the Montana Administrative Procedure Act (MAPA).

MAPA allows committees to:

- obtain an agency's rulemaking records to review them for compliance;
- submit written recommendations on adopting, amending, or rejecting a rule;
- require that a rulemaking hearing be held;
- require an economic impact statement relating to a rule adoption; and
- poll the Legislature by mail to determine if a proposed rule is consistent with legislative intent.

Interim committees may not prevent a rule or proposed amendment to a rule from being adopted, but a committee may object to the rule or amendment. If the majority of committee members object to the rule, the agency is notified, and the committee then addresses the rule at its next meeting. An objection may prevent a rule from being adopted for 6 months, during which time the agency may (but is not required to) withdraw or revise its proposed rule or rule change, or the committee may withdraw its objection. SB 82 (2021) allows the Speaker of the House and the Senate President to break a tie vote on any rule objection being considered by an interim committee.

COMMITTEE DECISION

The committee decided to have a formal presentation of administrative rules at each meeting, in addition to the administrative rule review memo.

PROGRAM MONITORING

Interim committees are tasked with monitoring the operation of assigned executive branch agencies with specific attention to the following:

- identification of issues likely to require future legislative attention;
- opportunities to improve existing law through the analysis of problems experienced with the application of the law by an agency; and
- experiences of the state's citizens with the operation of an agency that may be amenable to improvement through legislative action.

COMMITTEE DECISION

The committee decided to allocate 0.02 FTE to program monitoring duties for the interim. This includes 2 updates from agency directors during the interim, during the July 2025 and July 2026 meetings.

REVIEW OF ADVISORY COUNCILS AND REPORTS

At the request of any committee member, the committee may review statutorily created advisory councils and reports related to the agencies they oversee, to see if the councils or reports should be revised or repealed.

COMMITTEE DECISION

The committee decided not to allocate any time to the review of advisory councils and reports for the 2025-2026 interim.

REVIEW OF DRAFT AGENCY LEGISLATION FOR PRE-INTRODUCTION

The interim committee process allows for an early review of agency-requested legislation. Interim committees can begin reviewing proposed legislation as early as June in the year preceding the next legislative session. This process frees up time for the Legislative Services Division to concentrate on legislator bill draft requests after the election. Agency bills drafted through this process must be introduced before the 2027 Legislative Session begins.

REQUIRED AGENCY REPORTS

Agencies are required to submit certain reports to specific interim legislative committees by September 1st of the year preceding a legislative session, unless otherwise directed in statute. All reports must be submitted in writing. Committees may also request a presentation on a specific report from the agency. These reports are submitted in compliance with 5-11-210, MCA, which establishes the Legislative Services Division as the clearinghouse for the reports.

DEPARTMENT OF ADMINISTRATION

| REPORT | FREQUENCY | MCA |
|--|-----------|----------------------|
| Report on Information Technology Activities | Biennial | 5-11-222 (3)(b)(i) |
| Capitol Complex Advisory Council Report | Biennial | 5-11-222 (3)(b)(ii) |
| Employee Incentive Program Report | Biennial | 5-11-222 (3)(b)(iii) |

MONTANA VETERANS' AFFAIRS DIVISION

| REPORT | FREQUENCY | MCA |
|---|-----------|---------------------|
| Montana Board of Veterans' Affairs Report | Biennial | 5-11-222 (3)(b)(iv) |
| Decennial Veterans' Long Term Care Needs Study | Decennial | 5-11-222 (3)(b)(v) |

DEPARTMENT OF MILITARY AFFAIRS

| REPORT | FREQUENCY | MCA |
|---|-----------|---------------------|
| Grants to the Montana Civil Air Patrol | Biennial | 5-11-222 (3)(b)(vi) |

SECRETARY OF STATE

| REPORT | FREQUENCY | MCA |
|--|--------------------------------------|-----------------------|
| Statewide Election Security Report | Annual | 5-11-222 (3)(b)(vi) |
| Report on the Use of Help America Vote Act (HAVA) Funds | Annual | 5-11-222 (3)(b)(viii) |
| Youth Voting Program | <i>If requested by a SAVA member</i> | 5-11-222 (3)(b)(ix) |
| Changes Affecting Filing-Office Rules under the Uniform Commercial Code | <i>As needed</i> | 5-11-222 (3)(b)(xv) |

| | | |
|---|--|---------------------|
| Report of Statewide Canvassed Election Results | After each election subject to a statewide canvass | NEW – SB 440 (5)(c) |
|---|--|---------------------|

COMMISSIONER OF POLITICAL PRACTICES

| REPORT | FREQUENCY | MCA |
|---|-----------|--------------------|
| Commissioner of Political Practices Report | Biennial | 5-11-222 (3)(b)(x) |

BOARD OF INVESTMENTS

| REPORT | FREQUENCY | MCA |
|--|-----------|---------------------|
| Report on Retirement System Trust Investments | Annual | 5-11-222 (3)(b)(xi) |

PUBLIC EMPLOYEES' RETIREMENT BOARD

| REPORT | FREQUENCY | MCA |
|-----------------------------------|-----------|----------------------|
| Actuarial Valuation Report | Annual | 5-11-222 (3)(b)(xii) |

TEACHERS' RETIREMENT SYSTEM BOARD

| REPORT | FREQUENCY | MCA |
|--|-----------|-----------------------|
| Actuarial Valuation Report | Annual | 5-11-222 (3)(b)(xiii) |
| Report on Reemployment of Retired TRS Members | Biennial | 5-11-222 (3)(b)(xiv) |

COMMITTEE DECISION

The committee decided to allocate 0.02 FTE to the review of required agency reports for the 2025-2026 interim. The committee will decide which reports to request presentations for later.

PENSION OVERSIGHT

PENSION STATUTORY DUTIES

The State Administration and Veterans' Affairs Interim Committee has specific statutory responsibilities with respect to the statewide public employee retirement systems. Per 5-5-228, MCA, the SAVA committee shall:

- consider the actuarial and fiscal soundness of the state's public employee retirement systems, based on reports from the teachers' retirement board, the public employees' retirement board, and the board of investments, and study and evaluate the equity and benefit structure of the state's public employee retirement systems;
- establish principles of sound fiscal and public policy as guidelines;
- as necessary, develop legislation to keep the retirement systems consistent with sound policy principles; and
- publish, for legislators' use, information on the public employee retirement systems that the committee considers will be valuable to legislators when considering retirement legislation.

COMMITTEE DECISION

The committee decided to allocate 0.05 FTE to pension oversight for the 2025-2026 interim. This includes annual updates of the Green Sheets, annual reports/presentations from the pension boards, and 1-2 expert panels or presentations on pension-related topics of interest.

ANNUAL ACTUARIAL VALUATION REPORTS

The two major pension bills that passed the 2013 Session, House Bill 377 and House Bill 454, require the Teachers' Retirement Board and the Public Employees' Retirement Board to each make an annual report to SAVA and the Legislative Finance Committee (LFC) as soon as possible after the actuarial results are available.

COMMITTEE DECISION

The committee decided to hear the annual valuation reports at their November 2025 and October 2026 meetings.

LEGISLATOR'S GUIDE TO MONTANA'S PUBLIC EMPLOYEE RETIREMENT SYSTEMS

The SAVA committee is responsible for updating and publishing the Legislator's Guide to Montana's Public Employee Retirement Systems prior to each legislative session.

COMMITTEE DECISION

The committee decided to allocate 0.02 FTE to the Legislator's Guide. This includes a minimal update to the Guide.

INTERIM STUDIES

STUDY PROCESS

An interim study typically involves information gathering, issue identification, and recommendations.



PHASE ONE: GATHER INFORMATION

The first phase of the study is carried out over the first few meetings of the interim, when the Committee:

- reviews staff research papers and other informational materials on study topics;
- hears presentations by experts on various aspects of the study topics; and
- takes public comment from interested parties, who may offer specific study-related suggestions.

PHASE TWO: IDENTIFY ISSUES & NARROW FOCUS

In the second phase, the Committee spends a meeting or two narrowing the focus of the study. Members identify topics or questions they'd like to analyze further. This phase helps members concentrate on the issues they consider to be of the greatest importance and obtain any additional information needed to make final recommendations.

PHASE THREE: ANALYZE INFORMATION & IDENTIFY OPTIONS FOR ACTION

During the third stage, members review and decide on options for action. Potential solutions, including legislation, are usually reviewed and refined at multiple meetings before the Committee takes final action.

PHASE FOUR: FINALIZE FINDINGS, RECOMMENDATIONS, & DELIVERABLES

By the end of the interim, the committee should finalize a set of findings and recommendations and complete any deliverables including a final report and, possibly, committee legislation for the next legislative session.

HJ 48: STUDY OF MOVING THE DATE OF THE PRIMARY ELECTION

HJ 48 was ranked #17 in the 2025 Legislator Poll and was assigned to the State Administration and Veterans' Affairs Interim Committee by the Legislative Council during their June 10, 2025, meeting. The study resolution was requested by the 2025 House State Administration Standing Committee.

TASKS LISTED IN HJ 48 STUDY RESOLUTION

- Study moving the date of Montana's primary election.
- Examine existing dates, deadlines, and other procedures in Montana law that would need to be adjusted in order to change the date of the primary election.
- Assess any potential conflicts with the current timeline for the decennial districting and apportionment processes.
- Evaluate the impact of the changes on election administrators and voters.

- Examine the impact on other elections of changing the primary election date and identify possible areas for consolidation and efficiency.
- Identify the possible benefits, drawbacks, and tradeoffs for the voters of Montana of moving the date of the primary election.
- Develop legislation to introduce during the 70th legislative session that includes a new primary election date and all the changes needed to the Montana Code Annotated to implement the date change.
- Consult with all interested stakeholders, including but not limited to county election administrators, the Office of the Secretary of State, local and tribal government leaders, school administrators and officials, the Office of Public Instruction, stakeholder groups, and interested citizens.

COMMITTEE DECISION

The committee decided to allocate 0.25 FTE to the HJ 48 study, which includes multiple staff papers or presentations, multiple panels of state and national election officials, an outline of proposed changes to the election calendar, committee legislation, and a final report.

SJ 35: STUDY OF VOTER LIST MAINTENANCE AND INTEGRITY

SJ 35 was ranked #19 in the 2025 Legislator Poll and was assigned to the State Administration and Veterans' Affairs Interim Committee by the Legislative Council during their June 10, 2025, meeting.

TASKS LISTED IN SJ 35 STUDY RESOLUTION

- Study voter list maintenance in Montana, including the practices associated with maintaining these lists at the local level by county election administrators and at the state level by the Office of the Secretary of State.
- Research practices used in other states and identify best practices.
- Identify and correct inconsistencies and inadequacies in Montana election voter list maintenance programs that compromise election integrity.
- Evaluate how state and local databases, such as those maintained by the Motor Vehicle Division, utility companies, courts, the Department of Corrections, and the Department of Public Health and Human Services, may be used to help maintain the accuracy of voter lists.
- Evaluate how national databases, such as those maintained by the United States Postal Service, could be better utilized to help maintain the accuracy of voter lists.
- Research what other federal data is available regarding citizenship and voting history that may be useful for maintaining the accuracy of voter lists.
- Identify places in which state law needs to be reconciled with federal law.
- Develop legislation to address these issues and be introduced in the 70th legislative session.
- Consult with all interested stakeholders, including but not limited to election administrators, the Office of the Secretary of State, and concerned citizens.

COMMITTEE DECISION

The committee decided to allocate 0.35 FTE to the SJ 35 study, which includes multiple staff papers or presentations, multiple panels of stakeholders, state officials, and national officials, stakeholder feedback and engagement, committee legislation, and a final report.

OTHER COMMITTEE WORK

REVIEW OF PROPOSED STATEWIDE BALLOT ISSUES

Interim committees are required to hold a public hearing on a statewide initiative referred to the committee by the executive director of the Legislative Services Division. The committee then votes to either support or not support the placement of the proposed statewide initiative on the ballot. The committee's vote does not impact the placement of the proposed initiative on the ballot, but it is included on the signature gathering form.

The review process may result in additional committee meetings because the committee vote must be submitted to the Secretary of State no later than 14 days after receipt of the final text of the statewide initiative.

The statutory requirement for interim committee review of ballot initiatives is being litigated at the Montana Supreme Court. Staff will update the committees when litigation is completed and if the committees have any duties in this area while the case is pending (Case: *Ellingson v. State*, Montana Supreme Court No. DA 25-0142 (Filed Feb. 18, 2025)).

| COMMITTEE DECISION |
|---|
| The committee decided to allocate 0.02 FTE to the review of proposed statewide ballot issues. |

MEMBER TOPICS

Interim committees may take up other matters related to the agencies and topics areas they oversee. Depending on whether committee members put greater or less emphasis on their statutory duties related to interim studies and agency monitoring, they have more time to focus on SAVA-relevant member topics.

PROPOSED MEMBER TOPICS

The following topics were proposed by individual SAVA committee members for consideration of the full committee.

| PROPOSED TOPIC | OVERVIEW | EST. TIME NEEDED |
|--|--|------------------|
| HB 488 (2025) | HB 488 passed the House during the 2025 Legislative Session and then died in the Senate. Some committee members expressed interest in looking at the bill and exploring ways to amend it to address the concerns raised by the bill's opponents. | 1-2 meetings |
| Pilot program for additional support to election offices during busy times | Exploring the possibility of creating a pilot program through the Secretary of State's Office to provide additional support (with all the relevant training and qualifications) to election offices during the busiest parts of election season. | 3-4 meetings |

| COMMITTEE DECISION |
|---|
| The committee decided to allocate 0.10 FTE to each of the member topics proposed above. |

EMERGING ISSUES

Members may propose investigation of emerging issues at any time during the interim. Agencies may also request that the committee study an emerging issue that has resulted from court decisions, federal actions, or another cause.

Emerging issues are not necessarily member issues and may be raised by an agency or by staff. However, to be on the agenda, the Presiding Officer or other SAVA member must request agenda time. Staff resources are limited, so additions to the work plan must be accompanied by deletions to retain scheduling balance.

COMMITTEE DECISION

The committee decided to allocate 0.04 FTE to emerging issues and will decide on the topics as they arise during the interim.

COMMITTEE LEGISLATION

Per section 5-5-215(2), MCA, "each interim committee shall prepare bills and resolutions that, in its opinion, the welfare of the state may require for presentation to the next regular session of the legislature."

HB 142 (2025) revised 5-5-215 (2) to state that:

- (2) "...An interim committee may by vote request ~~four~~ **five** bill drafts on a partisan basis and an unlimited number of bill drafts on a bipartisan basis.
-
- (4) As used in this section:
 - (a) "bipartisan basis" means a vote in which members from more than one party vote to request a bill draft; and
 - (b) "partisan basis" means a vote in which members from only ~~one~~ **the majority** party vote to request a bill draft.

APPENDIX A: MEETING SCHEDULE

MEETING DATES

| | |
|-------------------------------------|--|
| Wednesday, July 30, 2025 | Organizational meeting |
| Thursday, September 25, 2025 | |
| Monday, November 17, 2025 | |
| Monday, January 12, 2026 | |
| Monday, March 9, 2026 | |
| Monday, May 4, 2026 | |
| Tuesday, July 7, 2026 | |
| Wednesday, September 2, 2026 | Complete regular interim work (wrap-up studies, approve final reports, etc.) |
| Tuesday, October 27, 2026 | ½ day meeting for annual actuarial valuation reports from MPERA and TRS |