



# 2008 Workplan

May						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
		4	5 125248 Battle of Puebla (M) Historical Remembrance Day	6	7	127238
June						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	1	2	3	4	5	124231
July						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
				1	2 183182 Canada Day	184192
August						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
				6	7	190175
September						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
		1	2 244121	3	4 245120	5 246118
October						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
				1	2 27401	3 253112
November						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	1 30503 All Saints Day (M)	2	3 30603 Day of the Dead (M)	4 30758 St. Andrew's Day	5	6 30857
December						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
		1	2 33630	3	4 33625	5 33729

## Joint Legislative Audit and Review Commission

May 12, 2008

## In Brief...

### 2008 Workplan

The JLARC workplan is prepared after each Session of the General Assembly and approved by the Commission at its first meeting of the year. The workplan outlines the projects to be initiated, continued, or completed during the year as well as the continuing oversight activities for which the Commission is responsible.

Projects to be completed or initiated in 2008 include reviews of technical issues in the State voter registration system, the mitigation of the costs of substance abuse, waste reduction efforts, State employee compensation, institutional compliance with higher education management agreements, operations, services and costs at the Virginia Information Technologies Agency, a process for evaluating budget requests, autism services, and the impact of the eVa procurement system on small businesses.

Ongoing oversight activities required by statute involve monitoring and review of the Virginia Retirement System, State spending growth, State SOQ spending, internal service funds, and agency performance measures. Also, JLARC is responsible for evaluation of proposed mandated health insurance benefits in support of the General Assembly's Special Advisory Commission on Mandated Health Insurance Benefits.

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**This document is available on the JLARC website at  
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# JLARC Work Planning Process

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The Joint Legislative Audit and Review Commission (JLARC) is the oversight arm of the Virginia General Assembly. It was established by the legislature in 1973 to review and evaluate the operations and performance of State agencies and programs. Since its establishment, JLARC's responsibilities have been expanded to include oversight of the Virginia Retirement System, review of fiscal impact statements, support for the Council on Virginia's Future, evaluation of proposed mandated health insurance benefits, and other oversight activities. The evolution of JLARC's statutory mandates requires a structured but flexible work planning process.

This workplan document reflects Commission and staff judgment on a feasible work schedule for 2008. The work planning process is a modified management-by-objective system adapted to serve a small, research-oriented organization such as JLARC. The process can be subdivided into three basic steps: plan preparation and approval, plan control, and plan evaluation.

## PLAN PREPARATION AND APPROVAL

The JLARC biennial budget and research topic selection processes are the foundation for the annual workplan. The plan is prepared annually by the director and the deputy director. Research topics are developed and approved annually by the Commission and the General Assembly. Plan preparation begins after topics have been selected, usually near the end of the legislative session.

The workplan establishes a general framework for defining agency goals and objectives, work activities, a project timetable, and staff assignments for the current year. The plan also aids in problem identification and may be periodically revised to reflect changes in organizational priorities and needs. While there can be substantial overlap in JLARC's work areas, objectives and activities are presented for the ten separate program areas within this plan:

- *Research Plan and Priorities* — a brief summary of studies and other research activities to be completed during the year.

- *Virginia Retirement System Oversight* — a discussion of the continuing oversight activities and research projects for the next year.
- *Fiscal Analysis* — a discussion of activities of the fiscal analysis section, including expenditure forecasting, fiscal impact reviews, and an annual report on State spending trends.
- *Other Ongoing Oversight* — a discussion of JLARC’s responsibilities regarding internal service funds, higher education management agreements, evaluations of proposed mandated health insurance benefits, and other areas.
- *Division Management* — a discussion of work activities carried out within each JLARC research division.
- *Research Methods* — a listing of work activities to be carried out by the staff methodologist.
- *Information Systems Support* — the computer support activities to be managed by the computer resource manager or other relevant staff.
- *Publications and Graphics* — a summary of work activities planned by the publications analyst.
- *Business Management and Office Services* — an outline of administrative and office services activities.
- *Training and Development* — a discussion of staff training and development planned for the year.

## PLAN CONTROL

The annual workplan is submitted to the Commission for its review and approval, generally in May of each year. Agency and project managers are periodically informed about project scheduling and achievements via project workplans, weekly planning meetings, monthly planning and project status reports, and personnel time allocation reports.

Weekly planning meetings are held most Monday mornings and feature informal reports on the status of projects and activities. These meetings are used to coordinate activities and to set priorities for administrative support during the week. The staff leadership team—which consists of the director, deputy director, division chiefs, and managers of the business, fiscal analysis, and methods sections—outlines a plan of work for the period preceding each Commission meeting.

Periodic meetings are held with project leaders and the leadership team. These meetings are a vehicle for keeping key staff members involved in and informed of important items of organizational and

project interest. Plan, project, and other work responsibilities are also communicated through project-specific planning documents and organizational directives such as the *Research Guide* and *Administrative Manual*.

The leadership team periodically reviews status reports on each of the ongoing research projects. Status reports include such information as the completion date, work phases completed, work accomplished since the last reporting period, and significant report findings. The workplan may be revised from time to time to reflect changes in project scope, status, and priorities.

Time allocation forms are prepared by staff on a weekly basis. These forms are used to track individual and project time and to prepare periodic cost allocation reports when needed.

## **PLAN EVALUATION**

The accomplishments of the JLARC workplan can be measured by four types of outcomes:

- *Products* — studies and reviews produced and reported;
- *Completion of Other Scheduled Activities* — the extent to which work activities are effectively completed;
- *Legislative/Executive Utilization* — (a) the extent to which JLARC reports provide useful information to the General Assembly and executive agencies, (b) the extent to which the legislature and executive agencies implement JLARC recommendations, (c) potential for cost savings accruing to the Commonwealth, and (d) potential for improvements in agency operations and service delivery; and
- *Legislative Feedback* — the extent to which members of the Commission, the General Assembly, and leadership use the research products and information.

JLARC accomplishments are also assessed by follow-up of completed studies and reported biennially in the *Report to the General Assembly*. The last such report was prepared in September of 2007; the next report will be submitted in September 2009.



# Mission, Goals, and Objectives

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**J**LARC's mission, goals, and objectives are based on the statutory mandates for the agency and direction from the Commission.

## MISSION

JLARC's mission is to provide the General Assembly with an objective and vigorous oversight capability. Through analytic research and evaluation, the Commission aids in ensuring that the Legislature is informed about State program operations, agencies fulfill legislative intent, and programs operate efficiently, effectively, and economically.

## GOALS

JLARC's goals are based on the statutory mandates for the agency:

- Provide the General Assembly with reliable and valid information for use in legislative decision-making.
- Monitor and report whether State agencies and programs are in compliance with legislative intent concerning appropriations and objectives.
- Determine whether State agencies and programs meet criteria of efficiency, effectiveness, and economy.

## OBJECTIVES

JLARC has 12 objectives related to its mission and goals:

- Complete management, operational, program, and/or performance reviews and evaluations of State agencies and programs as directed by the General Assembly or the Commission in accordance with the Commission's general statutory authority and the Legislative Program Review and Evaluation Act.
- Provide accurate and timely information about the effectiveness and efficiency of State agencies and programs to members of the General Assembly, other governmental entities, and the citizens of Virginia.

- Develop report recommendations that will help agencies to operate more efficiently, effectively, or economically; improve services; and identify and eliminate duplication, overlap, and poor performance.
- Complete annual reviews of spending growth in State government and periodic reviews of expenditure forecasts.
- Complete reviews of fiscal impact statements as requested by the chairs of the standing committees during sessions of the General Assembly.
- Oversee and evaluate internal service funds in compliance with statute and legislative direction.
- Oversee and evaluate the Virginia Retirement System in compliance with statute and legislative direction.
- Evaluate proposed mandated health insurance benefits and report the findings to the Special Advisory Commission on Mandated Health Insurance Benefits.
- Evaluate compliance with and impact of the management agreements for State-supported institutions of higher education and report the findings to the General Assembly.
- Monitor agency implementation of Commission recommendations and prepare follow-up studies on completed reports as necessary.
- Complete other oversight responsibilities such as participation in debt capacity and inmate forecasting committees.
- Continuously enhance JLARC research processes and practices, staff skills and abilities, and information technology resources.

## Research Plan

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To complete the work mandated by the General Assembly and the Commission, a schedule is developed for each of the studies to be reported for the year. This schedule is based on deadlines in the study mandates, the information needs of the legislature, the complexity of the research involved, and the availability of staff and other resources. Detailed research workplans are developed for each study to ensure timely completion of the work as scheduled. The studies to be completed or initiated in 2008 are summarized below and other oversight activities are summarized in later sections of the workplan.

### **Special Report: Review of Selected Issues in the Virginia Election Registration and Information System**

(Planning date for briefing: June 2008)

In January 2008, the Chairman of the House Appropriations Committee requested that JLARC staff evaluate several concerns raised by the Voter Registrars Association of Virginia with the State's new voter registration system. This technical review of the Virginia Election Registration and Information System (VERIS) focuses on three issues: (1) the validation of street addresses with the US Postal Service address database, (2) the use of Social Security numbers as unique fields in the registration database, and (3) the extent to which VERIS makes use of automatic decision-making or relies on local staff to make changes to the database.

### **Mitigating the Costs of Substance Abuse in Virginia**

(Planning date for final briefing: June 2008)

House Joint Resolution 683 and Senate Joint Resolution 395 (2007) direct JLARC staff to study the impact of substance abuse on State and local budgets. National studies have found that substance abuse is associated with numerous societal problems such as crime, illness, family separation, and domestic violence. These issues often create costs that are borne, in part, by state and local governments. To mitigate the occurrence of these societal issues and their associated costs, several states have invested in an array of programs and services aimed at preventing and treating substance abuse. These states' evaluations suggest that substance abuse services yield net savings.

This evaluation will focus on determining the extent to which Virginia could realize savings by investing in substance abuse services. The study will (1) estimate the fiscal impact of substance abuse to Virginia State and local governments, (2) assess the extent to which existing programs and services mitigate the adverse consequences of substance abuse, and (3) identify the services needed to adequately meet the needs of Virginians and minimize the toll of substance abuse on the State and its citizens.

### **Review of Virginia's Waste Reduction Efforts**

(Planning date for final briefing: September 2008)

Senate Joint Resolution 361 (2007) directs JLARC staff to study Virginia's waste minimization, reuse, and recycling efforts. In 2006, Virginia's permitted solid waste management facilities received more than 25 million tons of waste, of which almost two-thirds was municipal solid waste. Also in 2006, Virginia reported recycling 3.7 million tons of material, or 38.4 percent of the material that is counted towards the recycling rate. The study mandate cites several concerns as factors leading to the need for review. Concerns included whether there is enough permitted landfill capacity given the State's current waste generation and disposal rates, the adequacy of funding for current waste reduction programs, and the inclusion of long-term waste reduction alternatives in Virginia's waste management planning.

The study will evaluate the success of the waste reduction programs currently being administered by the State. This review will also examine the success of other states' waste reduction programs, including recycling efforts, and will examine successful programs operating within the Commonwealth. Additionally, the study will recommend long-term waste reduction goals.

### **Review of Compensation for State Employees**

(Planning date for briefings: July and October 2008)

On November 13, 2006, the Commission approved a resolution directing staff to study compensation for employees of the Commonwealth. The resolution defines compensation as both salary and benefits, including health insurance, retirement, and leave. In FY 2007, the State spent approximately \$5.01 billion on compensation for salaried, classified State employees.

The programs and services the State delivers to citizens are comprehensive, complex, and critical. Therefore, the State needs to offer compensation that is competitive with other employers so it can recruit and retain the qualified employees needed to administer

these programs and services. The compensation the State provides must also motivate employees, facilitate their health and productivity, allow employees to balance work and other aspects of their life, and ultimately, allow them to retire at the right time.

JLARC staff plan to address four key issues: (1) To what extent is each element of compensation achieving its intended purpose? (2) To what extent are there financial concerns or opportunities within each element of compensation? (3) What potential changes, if any, to current compensation should the State consider? (4) How would any potential changes to current compensation impact the achievement of the purposes of compensation; State, local, and employee costs; and employee and employer satisfaction?

In addition to the research completed by JLARC staff, Mercer and PricewaterhouseCoopers have been hired to conduct complementary work, including: (1) comparing the State's total compensation to that provided by other private and government employers, and (2) conducting various analyses of the impact of changes to the current compensation approach.

### **Review of State Spending: 2008 Update**

(Planning date for briefing: November 2008)

The fiscal analysis section will continue its review of State spending, mandated by §30-58.3 of the *Code of Virginia*. The November report will update the 2007 report by including expenditures and appropriations from FY 2008 and by examining budget growth from FY 1999 through FY 2008. The report will also identify the largest and fastest growing programs and compare the growth to indicators of economic activity (such as inflation) and other factors.

### **Review of Institutional Compliance With Higher Education Management Agreements**

(Planning date for briefing: November 2008)

The Restructured Higher Education Financial and Administrative Operations Act (§23-38.88 et seq.) directs JLARC to conduct a review related to the management agreement with each public institution of higher education. This review will examine the compliance of the University of Virginia, Virginia Tech, and the College of William and Mary with the terms of the agreements, which became effective July 1, 2006. These agreements provide the institutions with autonomy in the areas of capital outlay, leases of real property, procurement, human resources, information technology, and financial operations. In exchange for this autonomy, the institutions have agreed to meet a series of performance benchmarks

related to their financial, administrative, and academic operations. The JLARC review will consider the degree to which the institutions are meeting these benchmarks, the degree of compliance of the institutions with the terms of the management agreements, and the degree to which the institutions demonstrate the ability to successfully manage their operations under the agreements.

### **State Spending on Standards of Quality (SOQ) Costs**

(Planning date for briefing: December 2008)

Section 22.1-97 of the *Code of Virginia* requires JLARC to “report annually to the House Committees on Education and Appropriations and the Senate Committees on Finance and Education and Health the state expenditure provided each locality for an educational program meeting the Standards of Quality.” This work by JLARC staff is to be coordinated with the Virginia Department of Education (DOE). Section 22.1-97 also requires that DOE report local-level data on required local expenditures for the SOQ and local operating dollars budgeted and spent to meet local SOQ cost responsibilities.

The 2008 JLARC special report, the fifth report in this series, will address State SOQ spending in FY 2008. As was the case in prior years, JLARC staff plan to first brief the Commission on the findings, and then furnish the report to the committees identified in the statute. If requested, JLARC staff would be available to appear before any of the committees to discuss or answer questions about this report.

### **Operations, Services, and Costs of the Virginia Information Technologies Agency**

(Planning date for interim briefing: December 2008)

Senate Joint Resolution 129 (2008) and Item 29 E of the 2008 Appropriation Act direct JLARC to examine several specific aspects of the Virginia Information Technologies Agency (VITA). VITA provides information technology services to State agencies, in part through a contractual arrangement with Northrop Grumman. VITA also provides oversight of systems development projects proposed by State agencies through its Project Management Division. The costs of VITA services, including those provided by Northrop Grumman, are recovered through internal service fund fees charged to State agencies. The Information Technology Investment Board (ITIB), whose members are appointed by the Governor and General Assembly, oversees VITA and approves systems development projects.

The study resolution specifically requires JLARC to (1) evaluate the quality, cost, and value of the services delivered to State agencies and public bodies, and (2) characterize the impact to State agencies and public bodies resulting from the transition to a fee-based services model and to the information technology infrastructure partnership with Northrop Grumman. The Appropriation Act specifically requires JLARC to examine (1) the relationship between VITA and the ITIB, (2) the procurement of information technology goods and services by VITA on behalf of other State agencies and institutions of higher education, (3) the management of information technology projects by the agency's Project Management Division, and (4) the role that VITA could perform, if any, in the governance and oversight of information technology maintenance and operations now under the purview of State agencies. Work on this study will begin this spring and will be completed by December 2009.

### **Budget Pilot Analysis**

(Planning date for briefing: December 2008)

Section 30-58.4 of the *Code of Virginia* requires JLARC to analyze, on a pilot basis, the budget request of one State agency, with a report to be completed prior to the 2009 General Assembly. The agency is to be selected jointly by the Chairmen of the House Appropriations and Senate Finance committees, and JLARC. Once selected, JLARC staff will use both qualitative and quantitative methods to review the agency's fall 2008 budget request.

The statute also requires JLARC to review how others states provide for legislative oversight of executive branch budget submissions, and suggest procedures for enhanced legislative oversight that could be adopted in Virginia. The fiscal analysis section will identify comparable states and interview legislative fiscal staff from those states in an effort to identify practices and procedures that could enhance the Virginia General Assembly's budget oversight.

### **Interstate Benchmarks (2008 Update)**

(Planning date for updated publication: January 2009)

In October of 2003, the Commission directed staff to compile and publish statistics on how Virginia compares to other states on a variety of measures. While some demographic data—such as population and per capita income—are included, the principal measures will be financial (for example, state and local revenues and state and local taxes). The Commission directed that, where possible, rankings be adjusted to reflect the impact of State expenditures on

the Revenue Stabilization Fund and on car tax relief. As directed, selected statistics will be updated for 2008.

### **Review of Autism Services in Virginia**

(Planning date for briefing: June 2009)

House Joint Resolution 105 (2008) directs JLARC staff to study the availability and delivery of autism services in Virginia. The spectrum of autism disorders is comprised of developmental disabilities that often appear before age three and impair social interactions and communication. The prevalence of autism spectrum disorders has increased by 173 percent during the last decade, affecting one in every 150 children at age eight according to the Centers for Disease Control and Prevention. However, the availability and adequacy of services that identify, treat, and manage autism may not have kept pace with the rising number of Virginians affected by these disorders. Moreover, criminal justice personnel may not be well-informed about the effects of autism and how best to address them.

This study will benchmark Virginia's autism services against those offered in other states and nationally-recognized best practices. In particular, this evaluation will (1) determine which autism services are offered in Virginia compared to other states; (2) assess the extent to which educational opportunities about autism are available for law enforcement and judicial personnel; (3) identify best practices for the assessment, treatment, and management of autism, as well as autism education; (4) evaluate the need and means for sharing autism assessment results across relevant agencies; and (5) recommend ways to improve the delivery of autism services in Virginia. Research for this study will begin in the summer of 2008.

### **Impact of eVirginia on Small Businesses**

(Planning date for briefing: 2009)

House Joint Resolution 119 (2008) requires JLARC to study the impact of eVirginia (eVA) on small businesses in the Commonwealth. State agencies, local governments, and colleges and universities use eVA to announce bid opportunities, invite bidders, receive quotes, and place orders for goods and services. HJR 119 directs JLARC to (i) identify the total number of contracts and dollar amount awarded to small businesses annually through eVA since its inception, and (ii) examine the impact of the fee structure and the mandatory use of eVA on procurement opportunities for small businesses. This project is to be staffed late in 2008 and completed in 2009.

## Commission Reporting Schedule

Table 1 shows the schedule for presenting the study findings and recommendations to the Commission in 2008. The schedule accounts for specific reporting requirements in the joint resolutions that directed several of the studies as well as the research workload for each project.

**Table 1**  
**Proposed Commission Reporting Schedule for 2008**

<b>May 12</b>	2008 JLARC Workplan Impact of JLARC Studies 2008 Auditor of Public Accounts Workplan
<b>June 9</b>	Review of Selected Issues in VERIS Mitigating the Costs of Substance Abuse in Virginia
<b>July 14</b>	VRS Semi-Annual Investment Report Virginia Retirement System Director and CIO Status Reports Status Report on State Employee Compensation Study
<b>August</b>	No Meeting
<b>September 8</b>	Review of Virginia's Waste Reduction Efforts
<b>October 14</b>	Review of Compensation for State Employees
<b>November 10</b>	Institutional Compliance with Higher Education Management Agreements Review of State Spending (2008 Update)
<b>December 8</b>	Review of the Virginia Information Technologies Agency (Interim Report) Budget Pilot Analysis State Spending on Standards of Quality Costs (2008 Update) VRS Biennial Status and Semi-Annual Investment Report
<b>Ongoing</b>	Virginia Retirement System Oversight Evaluations of Proposed Mandated Health Care Benefits Internal Service Fund Rate Reviews Debt Capacity Oversight Inmate Forecast Oversight Review of General Fund Expenditure Forecasts Fiscal Analysis Reports Fiscal Impact Statement Reviews (General Assembly Sessions) Staff Support for the Council on Virginia's Future Staff Support for the Joint Commission on Transportation Accountability



# Virginia Retirement System Oversight

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The Virginia Retirement System Oversight Act of 1994 authorizes JLARC's oversight function of the Virginia Retirement System (VRS) (§§ 30-78 through 30-84 of the *Code of Virginia*). The Act directs JLARC to oversee and evaluate the Virginia Retirement System on a continuing basis and as directed by the General Assembly.

## GOALS AND OBJECTIVES

- Provide timely, accurate information about the retirement system to the General Assembly.
- Assess the appropriateness of the structure of governance for the retirement system and recommend modifications to the structure as necessary.
- Evaluate on a periodic basis the soundness of the retirement system trust funds.
- Evaluate the performance of the VRS investment program and report to the General Assembly on any significant changes in the investment program.
- Evaluate the efficiency and effectiveness of VRS administration and operations.

## WORK ACTIVITIES FOR 2008

Work activities for oversight of the retirement system are intended to ensure that the General Assembly is informed about important aspects of the system's investments, actuarial status, and administrative effectiveness.

### Attend Monthly Meetings of the Board of Trustees and Committees

(Planning date: Ongoing)

JLARC staff will continue to attend the regular meetings of the VRS Board of Trustees and the Investment Advisory Committee. Staff may also periodically attend meetings of the following committees of the VRS Board of Trustees: administration and person-

nel, benefits and actuarial, audit and compliance, and optional retirement plan advisory committee.

### **Semi-Annual Investment Report**

(Planning date for briefing: July 2008)

JLARC staff will continue to monitor and review the VRS investment program. The focus of the review will remain on investment policy and asset allocation, as well as investment performance and risk management. JLARC staff will obtain detailed information concerning these areas through regular attendance of meetings of the VRS Investment Advisory Committee and the VRS Board of Trustees, structured interviews with VRS investment staff, reviews of VRS documents, reviews of documents of other public employee retirement systems, and analysis of secondary sources of investment data.

At the July 2008 meeting, the VRS director and chief investment officer will also provide a status update on the system to the Commission.

### **Biennial Status and Semi-Annual Investment Report**

(Planning date for briefing: December 2008)

Section 30-81 of the *Code of Virginia* also requires JLARC to prepare a biennial status report on issues related to the VRS. Issues for this year's report will reflect recent changes in benefit programs, long-term investment performance, funding levels, VRS' modernization efforts, and other issues facing the VRS. The status report will be completed in December of 2008.

### **Update of the Legislator's Guide to the Virginia Retirement System**

(Planning date: Ongoing)

The Retirement Oversight Act requires JLARC to publish a *Legislator's Guide to the Virginia Retirement System*. The *Guide* is produced with the assistance of the VRS staff, and is available online at <http://vrsguide.state.va.us>. It is revised each year to reflect changes in benefit programs as well as investment and financial information. By publishing the *Guide* online, labor and other costs associated with producing hard copies have been eliminated. In addition, access to the *Guide* is more convenient, and links to legislation, *Code of Virginia* references, and other information are available. Additional updates to the *Guide* are planned for 2008.

## Fiscal Analysis Services

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The fiscal analysis section was established by the General Assembly in 1999 to assist with legislative fiscal impact analysis and to conduct oversight of the executive branch expenditure forecasting process.

During each General Assembly Session, the section focuses on reviewing executive branch fiscal impact statements that are referred to JLARC by committee chairs. The results of the staff reviews are published in fiscal impact review reports. In addition to reviewing fiscal impact statements, the section responds to ad hoc requests by General Assembly members and other legislative staff, as determined by the JLARC chairman or director.

The section also conducts an annual review of State budget growth (required under §30-58.3 of the *Code of Virginia*). In addition, the section reviews the forecasts that are key to major State programs, including Medicaid, corrections, primary and secondary education, and higher education. Staff also participate in other JLARC projects and reviews.

### GOALS AND OBJECTIVES

- Provide technical support to the General Assembly in the areas of legislative fiscal analysis and expenditure forecasting.
- Review the fiscal effects of legislation at the request of committee chairs, as required by the Appropriation Act.
- Evaluate the performance of key executive branch forecasts and their relation to the Commonwealth's biennial budget, and provide information about these forecasts to the General Assembly.
- Conduct annual assessments of State expenditure growth, as required by §30-58.3 of the *Code of Virginia*.

## **WORK ACTIVITIES FOR 2008**

Work activities for the fiscal analysis section are related to statutory mandates for reviews of spending, the fiscal impact of legislation, and expenditure forecasts.

### **Review State Spending Growth**

(Planning date for briefing: November 2008)

The JLARC fiscal analysis section will continue its review of State spending as discussed in Section 3 of this workplan.

### **Prepare Fiscal Impact Reviews**

(Planning date: Annual Sessions of the General Assembly)

Upon the request of a committee chair, the fiscal analysis section reviews the fiscal impact statement on any legislation. Through the 2008 General Assembly, the section has prepared about 70 such reviews. These reviews serve as a “second opinion” on the projected cost of a specific bill and have resulted in concurrence as well as non-concurrence with the fiscal impact estimated by State agencies.

### **Monitor Expenditure Forecasts**

(Planning date: Ongoing)

In 2000 and 2001, the fiscal analysis section presented the Commission with an overview of the forecasting methods and procedures used in developing four major “budget driver” forecasts: elementary and secondary education average daily membership (school attendance), higher education enrollment projections, Medicaid expenditures, and the State-responsible felon population. The review found that three of the four forecasts are strongly linked to the State budget (the exception was higher education) and that the four forecasts used to prepare the FY 1999 budget were relatively accurate. The section will review these expenditure forecasts on a periodic basis.

### **Budget Review Pilot Project**

(Planning date: December 2008)

Section 30-58.4 of the *Code of Virginia* requires JLARC to conduct a pilot program to analyze and evaluate biennial budget submissions from State agencies. The statute also requires JLARC to re-

view how other states provide for legislative oversight of executive branch budget submissions, and suggest procedures for enhanced legislative oversight that could be adopted in Virginia. The fiscal analysis section will identify comparable states and interview legislative fiscal staff from those states in an effort to identify practices and procedures that could enhance the Virginia General Assembly's budget oversight.



# Section 6

## Other Oversight Activities

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The Commission is responsible for several ongoing oversight activities assigned by statute. These responsibilities are assigned to JLARC management staff although additional staff may occasionally be assigned to these duties. These oversight activities include reviews of internal service funds, proposed health insurance benefits, higher education institution management agreements, and performance measures used by agencies. In addition, staff also periodically review Administrative Process Act exemptions. Staff also participate in the Inmate Forecast Technical Committee and the Debt Capacity Advisory Committee.

### INTERNAL SERVICE FUNDS OVERSIGHT

JLARC monitors internal service funds on a continuing basis, pursuant to its authority under §2.2-803 of the *Code of Virginia*. The Commission reviews the status of fund accounts and evaluates requests to change the nature and scope of the services provided or the customers served. The Commission also approves in advance the rates employed by fund managers for billing customer agencies. JLARC monitors nine funds of the Department of General Services (DGS) and three funds of the Virginia Information Technologies Agency (VITA):

1. The *Virginia Distribution Center Fund* (DGS) for the procurement and distribution of goods such as canned foods, paints, paper products, and cleaning supplies to State agencies, local governments, and school divisions.
2. The *Office of Graphic Communications Fund* (DGS) for graphic design, layout, photography, and typesetting services provided to State agencies.
3. The *Building Operations Program Fund* (DGS) for the building rent plan as well as special maintenance agreements between DGS and entities whose office space is located at the seat of government.
4. The *State Surplus Property Operation Fund* (DGS) for the management and disposal of surplus property for State agencies and institutions.

5. The *Federal Surplus Property Operation Fund* (DGS) for the acquisition and distribution of federal surplus property.
6. The *Consolidated Laboratory Services Fund* (DGS) for the laboratory analyses provided for the Department of Environmental Quality and the Department of Agriculture and Consumer Services; the testing of motor fuels for the Virginia Department of Transportation; and the testing of drinking water samples for public waterworks.
7. The *Real Estate Services Fund* (DGS) for the management of transactions involving the sale of State-owned real property and the leasing of space to State tenants..
8. The *Bureau of Capital Outlay Management Fund* (DGS) for the review of plans and specifications for capital and non-capital State projects to ensure compliance with the Virginia Uniform Statewide Building Code.
9. The *Fleet Management Fund* (DGS) for the operation and management of the State's centralized fleet of passenger vehicles.
10. The *Computer Services Fund* (VITA) for data processing and desktop computing services to State agencies.
11. The *Automated Services Fund* (VITA) for automated systems design, development, and maintenance services to State agencies.
12. The *Telecommunications Services Fund* (VITA) for telephone and data transmission services to State agencies.

During 2008, the Commission will consider and act on the rate changes requested by DGS and VITA internal service fund managers.

## **EVALUATION OF PROPOSED HEALTH INSURANCE MANDATES**

Section 2.2-2503 of the *Code of Virginia* directs JLARC to assess and evaluate proposed mandated health insurance benefits and report its findings to the Special Advisory Commission on Mandated Health Insurance Benefits. For 2008, staff will complete five reports covering proposed mandated benefits: coverage for the diagnosis and treatment of autism, coverage for hearing aids for minors, coverage for medically necessary amino acid-based elemental formulas, coverage for alternatives to surgery, and coverage for the treatment of infertility. Presentations will be made to the Special Advisory Commission in the summer and fall of 2008.

## **REVIEW OF HIGHER EDUCATION INSTITUTION MANAGEMENT AGREEMENTS**

The "Restructured Higher Education Financial and Administrative Operations Act," through Section 23-38.88 D.3 of the *Code of Virginia*, requires that JLARC review the implementation of higher education management agreements that were executed in November 2005 by the University of Virginia, Virginia Tech, and the College of William and Mary, and became effective July 1, 2006. The act identifies 11 goals which the institutions are committed to meeting. JLARC is to consider the degree to which the institutions are meeting these goals, the overall degree of compliance of the institutions with the terms of the management agreements, and the degree to which the institutions demonstrate the ability to successfully manage their operations under the agreements.

The JLARC review for 2008 will consider the degree to which the institutions are meeting these benchmarks, the degree of compliance of the institutions with the terms of the management agreements, and the degree to which the institutions demonstrate the ability to successfully manage their operations under the agreements.

## **REVIEW OF PERFORMANCE MEASURES AND SUPPORT OF THE COUNCIL ON THE FUTURE OF VIRGINIA**

Since 1990, the Department of Planning and Budget (DPB) has been developing performance measures for use by Virginia State agencies. The General Assembly has encouraged this effort since the 1992 Appropriation Act mandated a pilot performance measures program. DPB has submitted draft measures to JLARC staff for review and comment. Since 2000, the Appropriation Act has provided that JLARC review and comment on DPB's development of performance measures. HJR 773 of the 2001 Session also required that JLARC assess the use of performance budgeting, measurement, and program evaluation in legislative budgeting.

In 2003, the General Assembly passed and the Governor signed House Bill 2097, the "Roadmap to Virginia's Future." This act provides that each agency develop strategic plan information and "performance measurement results." The act also creates the Council on the Future of Virginia and (in §2.2-2686 of the *Code of Virginia*) directs JLARC to provide staff assistance to the council. JLARC staff will provide technical support as requested by the council in 2008.

## **REVIEW OF ADMINISTRATIVE PROCESS ACT EXEMPTIONS**

The Administrative Process Act (APA) applies to the creation and implementation of regulations by government agencies. The APA specifies that opportunities be provided for public notification and comment on the regulations. Regulatory activity that is exempt from the APA in many cases does not allow for the same degree of opportunity for public notification and comment.

Section 2.2-4005 of the *Code of Virginia* requires that JLARC “shall conduct a review periodically of the exemptions authorized by this chapter. The purpose of this review shall be to assess whether there are any exemptions that should be discontinued or modified.” The provision that requires that JLARC’s review be performed “periodically” provides the Commission with the flexibility to initiate this activity at times when such a review appears warranted, such as when issues or concerns have been raised relative to regulatory agency use or abuse of the exemptions.

## **PARTICIPATION ON THE INMATE FORECAST TECHNICAL COMMITTEE**

Legislation passed in 1995 (HB 2584) requires the development of a prison population forecast based on a consensus forecasting process. The act provides for the establishment of a technical forecast group comprised of representatives from JLARC and the Department of Corrections, the Department of Criminal Justice Services, the Virginia Criminal Sentencing Commission, and experts appointed by the Secretary of Public Safety from the fields of criminal justice, population forecasting, or other appropriate fields of study. The Deputy Director of the Virginia Criminal Sentencing Commission acts as chair of the technical advisory group. The staff methodologist represents JLARC in reviewing the development of forecast methodologies and alternative forecasts of the State’s prison and jail populations.

## **PARTICIPATION ON THE DEBT CAPACITY ADVISORY COMMITTEE**

The JLARC director is a member of the Debt Capacity Advisory Committee created by the 1994 General Assembly. The committee is required to review the size and condition of the Commonwealth’s tax-supported debt and submit to the Governor and General Assembly an estimate of the maximum amount of new tax-supported debt that may be prudently authorized for the next biennium. If necessary, the director submits an informational memorandum to the chairs of the money committees.

## Division Management

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**R**esearch projects are usually assigned to one of two research divisions, each headed by a division chief. One or more projects are also usually assigned to the deputy director, who will carry out the functions of a division chief for those projects. The purpose of division management is to ensure quality products by supporting and monitoring the research and reporting activities of project teams. Division chiefs are responsible for maintenance of organizational standards, adherence to deadlines, effective communication, and overall coordination of specific research tasks for each project assigned to the division. Major division chief activities include providing conceptual and research support, evaluating personnel, reviewing products, coordinating organizational resources, substantively editing reports, and carrying out project research and leadership roles when necessary.

### GOALS AND OBJECTIVES

- Produce high-quality reports that meet legislative needs for information.
- Promote the development of skilled and productive research teams.
- Manage projects to achieve consistency with workplans, deadlines, and staff resources.
- Support staff development through performance evaluation and training.
- Advise the director on broad organizational issues and participate in organizational planning.
- Promote clear and accurate communication throughout JLARC for project and personnel management purposes.
- Serve as a liaison with legislative committees and subcommittees formed under the Legislative Program Review and Evaluation Act or established for specific projects.
- Support research teams with the identification of issues and the development of project workplans.
- Develop and implement a framework for periodic monitoring of team products, processes, and documentation.

- Ensure that teams secure necessary organizational support in research methods, data processing, and report production.
- Advise teams on effective written and oral presentation of research findings and conclusions.
- Edit reports and briefings, as needed, for substance and style to ensure accurate, clear, and appropriate presentation to various audiences.
- Ensure that legislative committees receive appropriate information and logistical support.
- As necessary, serve as project leaders in lieu of team leaders who depart or are otherwise unable to successfully bring a project to closure.

## **WORK ACTIVITIES FOR 2008**

Coordination and management of assigned research staff and projects are the fundamental activities of the divisions. The division chiefs advise their respective teams and monitor products throughout the research and report development process. They also participate in organizational planning, extended project reviews, staff development, and project follow-up activities.

### **Project Management**

Each division chief meets with team leaders and team members to develop concepts, assess research and reporting processes and products, and monitor the status of projects. Projects are periodically discussed with the director.

### **Extended Review**

The extended review process subjects major research products to the scrutiny of the director, deputy director, division chiefs, the staff methodologist, and the publications analyst. The reviews routinely occur at two stages of the research process: the workplan and pre-exposure stages. At both stages, products are examined for sufficiency of evidence, soundness of conceptualization and recommendations, and clarity of presentation.

### **Staff Development**

Division chiefs participate in the performance appraisal of professional staff. They also provide formal and informal training and technical assistance, as needed, in aspects of project management, team building, research, and reporting.

### **Legislative Liaison**

Division chiefs help coordinate related projects and serve as a point-of-contact for legislative committees involved with a functional area. As necessary, they facilitate arrangements, transfer information, and perform follow-up activities.



## Research Methods

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The research methods section supports teams in developing and carrying out evaluations of State programs and agencies. The staff methodologist consults with project teams concerning individual project needs and trains staff members in the use of research techniques.

### GOALS AND OBJECTIVES

- Support the conceptualization, design, and implementation of research methods and techniques that produce valid results for the General Assembly.
- Develop and implement training activities to enhance staff members' capability to conduct applied research.
- Advise team members on research design, statistical methods, and data processing techniques to be used in the research process.
- Develop processes for providing technical assistance and consultation on JLARC studies.
- Provide technical assistance to the fiscal analysis section.

### WORK ACTIVITIES FOR 2008

The research methods section actively participates in team-based projects, training, and special projects.

#### Team Support

The staff methodologist frequently consults with project teams to explore alternative design concepts for studies and to assist in implementation of the designs. In 2008, the staff methodologist will also provide direct support for the study of Higher Education Management Agreements.

#### Training

Training offers an opportunity to enhance the capability of analysts to conduct research. The staff methodologist assesses the need for methods training and works with the deputy director to develop appropriate courses. Training activities include multiple-

session courses, workshops, individual tutorials, and informal discussions.

### **Extended Review**

The staff methodologist serves as a member of the extended review team. In addition to a general review of team projects, the staff methodologist is responsible for assessing the sufficiency of methods and analysis. The methodologist also verifies major analytic findings of reports.

### **Research Guide**

The staff methodologist works with the deputy director to update the *JLARC Research Guide*. The *Research Guide* is an evolving reference that is intended to operationally define, formalize, and enhance research activities at JLARC.

# Information Systems Support

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Information systems support is provided by a number of resources within JLARC to assist teams in developing and carrying out increasingly sophisticated analyses of State programs. Support activities include consulting with project teams concerning individual project needs as well as training staff members in the use of computers. In addition, JLARC research products are made available to the public through maintenance of a primary website (<http://jlarc.state.va.us>) and the *Legislator's Guide to the Virginia Retirement System* website (<http://vrsguide.state.va.us>).

Currently, most in-house information systems support is provided by the deputy director and the publications analyst. Other staff also support this function primarily as in-house experts on applications or tools for which they have been specially trained. For example, several staff have received training on Microsoft Access, ArcView GIS, and SAS, and provide assistance to other staff members on those applications.

## GOALS AND OBJECTIVES

- Advise team members on information processing techniques to be used in the research process.
- Provide technical assistance and consultation.
- Enhance the efficient use of available information processing resources, including personal computers.
- Support the availability and accessibility of computer resources used by the research staff.
- Make the *Legislator's Guide to the Virginia Retirement System* available to the General Assembly and the public on the JLARC website.
- Make JLARC research products available to the General Assembly and the public on the JLARC website.

## WORK ACTIVITIES FOR 2008

IT support for the teams and administrative functions in 2008 will focus on development of surveys, use of Microsoft Office applications by research staff, managing in-house applications such as the

time allocation system, development of PDF forms for personnel evaluations and other administrative processes, and hardware support as necessary.

Maintenance of the JLARC website during 2008 will involve adding new reports, updating publications lists, and ensuring the accuracy of other information. The websites for JLARC's *Legislator's Guide to the Virginia Retirement System* and the *JLARC Style Guide* (writing manual) will also be updated.

# Section 10

## Publications and Graphics

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The purpose of the publications and graphics section is to assist staff in developing research reports and briefings and in producing high-quality publications for use by the General Assembly and executive agencies. The publications analyst carries out the responsibilities of this program area.

### GOALS AND OBJECTIVES

- Produce high-quality JLARC publications on a timely basis at a reasonable cost.
- Create high-quality informational graphics to enhance the communication of research findings in reports and briefings.
- Serve as a resource to staff concerning audiovisuals (including film and digital photography), sound and video recording, presentation technology, and general communications.
- Consult with team members, team leaders, and division chiefs on formatting, writing, editing, and the use of graphics in research reports and other materials.
- Through self-training and systems development activities, maintain an in-house, state-of-the-art desktop publishing and presentation system to meet the organization's publications, presentation, and graphics needs.
- Contribute to the development of publishable research reports through participation in each report's extended review.
- Develop and implement training programs such as style guides, workshops, and tutorials to increase staff skills in writing, presentations, word processing, and graphics.
- Orient new staff to the agency's writing style and templates for reports and presentations.
- Update and maintain the online JLARC *Style Guide* and assist the computer resources manager as necessary with maintenance of other JLARC web pages.
- Explore audiovisual and computer resources available for use in training, professional development, graphics, presentation techniques, report production, and other areas.
- Lead special projects as required by the director.

- Participate in research studies as requested by the director.

## **WORK ACTIVITIES FOR 2008**

Report production is the primary function of the publications section. The section meets JLARC's needs for graphics, prepares reports for printing, and carries out other activities related to JLARC's reporting responsibilities.

### **Report Production**

The publications section prepares reports for printing as organizational products. The process has four main phases:

- *Graphic and Editorial Consultation.* From the time the project is assigned until the report goes into extended review, the research team works directly with the publications section as necessary on the preparation of graphics for report drafts and the briefing. Team leaders also consult with the publications analyst concerning composition, format, and editing.
- *Extended Review.* The publications analyst participates in every report's extended review process to critique organization, tone, format, effectiveness of the writing, general content, and graphics.
- *Editing.* The publications analyst reviews and marks or edits report drafts for grammar, coherence, clarity, stylistic consistency, and format. Consultations are arranged as necessary with the project team members.
- *Preparation for Printing.* After the team has received the agency responses and made necessary changes to the report, it is given a final review by the publications analyst. The graphics are finalized, and final format decisions are made. The document is then converted to a print-quality pdf. A camera-ready copy also is prepared, which is reviewed by the team leader and division chief and approved by the director. For the final disposition of legislative documents, the publications analyst coordinates with the Division of Legislative Automated Systems and/or the printer under State contract. The publications analyst also contracts with a bookbinder to bind three sets of the reports produced by JLARC each year.

### **Other Products and Responsibilities**

Besides producing final reports, the publications section prepares other final informational products for the organization.

- *Briefings.* Commission briefings in Senate Room A utilize a state-of-the-art digital projection system. The publications analyst manages and applies this technology according to the agency's needs and trains analysts on its use. The publications analyst also coordinates, provides graphic support for, and acts as stage manager for the monthly staff briefings to the Commission.
- *Special Reports.* The publications analyst consults with the appropriate staff members to produce special JLARC publications such as the *VRS Oversight Report*, *Virginia Compared to the Other States*, and special studies conducted by the fiscal analysis section. Once each biennium, the publications analyst is also responsible for producing the *Report to the General Assembly*, which combines general information about JLARC's role with follow-up of recent studies.
- *General Communications.* The publications section frequently participates in the review and preparation of agency correspondence, award submissions, surveys, informational briefings about the agency, internal forms and documents, and signage.

### **Publications Training**

The publications analyst provides training to impart knowledge and improve skills of JLARC staff. Private writing tutorials and reviews of analysts' early drafts are also available upon request. New staff are trained in JLARC style, report formatting, and use of JLARC templates. Additional training areas may include informational graphics, advanced word processing, and presentation software and hardware.

### **General Computer Responsibilities**

The publications analyst serves as backup to the deputy director regarding problems with the agency's personal computers and printers, the formatting of documents for use on the website, maintenance of selected web pages, and system coordination with the Division of Legislative Automated Systems.

### **Follow-Up and Reporting Activities**

Biennially, the publications analyst coordinates efforts to track implementation of study recommendations made in the past four years. Agencies use an online questionnaire to report any actions taken in response to recommendations, as well as savings resulting from those actions. Agency responses are maintained in an Access database. Consulting with the director and project leaders,

the publications analyst prepares JLARC's biennial *Report to the General Assembly*. This report summarizes recent studies, provides follow-up information on selected older studies, and reports the number of recommendations that have been implemented and the resulting savings to the Commonwealth. The next edition of this biennial report is due in September 2009.

# Business Management and Office Services

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The business management and office services section is responsible for the administrative functions of the office. It is under the general supervision of the deputy director. The business management function includes budgeting, fiscal, personnel and human resource activities, along with general administrative management of the office. The fiscal and human resources manager (business manager) oversees the daily operations of the section.

## GOALS AND OBJECTIVES

- Provide a responsive, service-oriented function for the office's research mission.
- Ensure an effective system of internal control to provide accountability, promote operational efficiency, strengthen compliance, and reduce the risk of financial or other asset losses due to fraud, waste, or abuse.
- Execute the budget plan and monitor expenses and receipts for compliance, as well as monitor and control expenditures for the current year for appropriateness, accuracy, and timely processing.
- Administer the payroll, oversee the timely completion of staff evaluations, monitor payroll deductions, and activate salary adjustments.
- Conduct all administrative preparation and follow-up for Commission meetings, including polling of members, copying and organizing documents, and drafting meeting minutes.
- Monitor and manage employee leave balances and track project hours and other staff activities through the time allocation system.
- Monitor and control fixed assets and inventory.
- Coordinate human resources and personnel services for the office.
- Assist in preparation for and orientation of new staff members.
- Administer employee benefit programs and assist staff in their efforts to access current information.

- Maintain the *JLARC Administrative Manual* and inform staff of policy and procedural changes or developments.
- Carry out responsibilities as outlined in the records management policies and procedures, including maintenance of agency archives.
- Ensure that the research staff is provided with accurate and timely document reproduction, word processing, and data entry support.
- Coordinate travel arrangements for research teams in the conduct of field work.
- Organize legislative tracking activities.
- Coordinate parking for agency staff.
- Provide opportunities for the support staff to receive training to enhance current skills and capabilities.
- Integrate office logistics and office activities.
- Provide quality phone and reception coverage.

## **WORK ACTIVITIES FOR 2008**

### **Budgeting**

Budgeting activities include establishing and monitoring the budget plan and processing and controlling agency expenditures. The current budget year's expenditures are monitored and controlled to ensure that prompt payment, reporting, and other established guidelines are met. Appropriate budget worksheets are prepared annually to ensure expenditures are maintained within the budget limits.

### **Payroll/Personnel**

Required reconciliations are completed and leave balances are monitored to ensure accurate payment to employees and proper withholding. The preparation of personnel evaluations is monitored to ensure timely completion and processing.

### **Benefits**

There have been many changes in the past several years with regard to employee benefits, particularly in the area of health care. In order to keep abreast of health care issues and to provide staff with accurate and current information, the section manager will continue to attend benefit administrator meetings. In addition, the section manager provides information to and assists employees

with flexible reimbursement accounts, optional life insurance, long-term care insurance, deferred compensation, savings bonds, and retirement benefits. Throughout the year, the section manager also assists employees with updating or changing their health care memberships or plans when qualifying conditions occur. The section will continue to assist with and inform employees about benefit changes related to the Virginia Retirement System, the Virginia Sickness and Disability Program, the Long-Term Care plan, Optional Group Life coverage, and the Deferred Compensation Plan. As benefits continue to change, the section manager distributes accurate and timely information and answers staff questions.

### **Commission Meeting Preparation**

The administrative section prepares materials used for JLARC Commission meetings. These include generating a Commission meeting preparation list, mailing materials to Commission members prior to meeting dates, copying and organizing all meeting materials, distributing meeting materials to Commission members, and drafting meeting minutes. After the completion of Commission meetings, the section processes members' travel reimbursements and assists with preparing reports and other materials for posting on the agency website.

### **Records Management**

The records manager, with the assistance of the administrative section, will carry out the responsibilities as outlined in the records management policy.

### **Revision of *Administrative Manual***

The manager distributes revisions on an ongoing basis. As a result of converting the manual to the Adobe PDF format, making and distributing updates and changes to the manual has become a more timely and efficient process. In addition, online publication of the administrative manual has reduced labor and other costs associated with producing hard copies, and has provided staff with desktop access to the manual. By producing the manual in the Adobe PDF format and on the desktop, staff can easily access links to websites containing additional benefits information and other State and federal policies.

### **Document Processing**

There is regular involvement with the research staff to promote a steady workflow of material through word processing and data en-

try assistance. Further, support staff assists with document reproduction activities.

### **Phone/Receptionist Services**

The section provides quality phone and receptionist coverage.

# Training and Staff Development

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**T**raining and staff development are largely the responsibility of the individual, but JLARC offers an annual training program to ensure that staff have skills appropriate to work requirements. Each staff member, in conjunction with his or her supervisor, assesses personal strengths and weaknesses. Individual staff members can then pursue self-directed study (such as a reading program or computer tutorials), training, university courses, or other options. The training program is coordinated by the fiscal and human resources manager.

## GOALS AND OBJECTIVES

- Maintain an organizational training program that promotes the accomplishment of agency missions and goals.
- Orient new staff to JLARC processes and procedures.
- Provide staff with greater opportunities to grow and succeed.
- Strengthen JLARC's approach to organizational and team management.
- Provide staff with appropriate training opportunities to improve work performance and enhance their capacity for greater responsibility.
- Provide staff with training opportunities on presentation skills and techniques.

## TRAINING PROGRAM

Staff training activities are designed to improve job performance. Job performance can be enhanced through meaningful learning experiences that impart knowledge, improve skills, or change attitudes.

### Needs Assessment

An ongoing assessment of training needs will be conducted for the research and administrative staffs. This assessment will be routinely addressed in leadership planning meetings. This assessment may include consideration of staff requests for training, review of

education and training courses already taken by staff, and review of performance reports.

### **Training Activities**

Based on organizational and individual needs, a training program is designed and implemented annually. The program contains training and education courses aimed at meeting JLARC's overall training and staff development needs. While the organization will attempt to provide opportunities for staff to acquire the skills necessary for advancement, responsibility ultimately rests with the individual. Staff members are expected to be proactive in identifying and addressing their own needs. Opportunities for training include

- in-house classes and ongoing tutorials,
- programs conducted by other State agencies,
- limited university tuition reimbursement for pre-approved coursework,
- consultant-conducted classes or programs at JLARC,
- outside seminars and training sessions, including continuing education and skills development classes at State universities and community colleges,
- self-directed reading programs, and
- others as requested and approved.

Training courses will be designed to strengthen staff research, managerial, technical, and human relations skills.

### **2008 Training Activities**

Specific activities for the 2008 training program are included in Table 3 (next page). Other activities will be added as needed.

**Table 2**  
**2008 Training Program**

<b>Periodic or Special Training</b>	<b>Provider</b>
Legislative Staff Management Institute	NCSL
Fundamentals for Supervisors	VCU
Commonwealth Management Institute Training	VCU
Virginia Executive Institute	VCU
Health Care Benefits for 2007	DHRM/Selected Staff
Human Resource Leadership Conference	DHRM
Library of Virginia Orientation	Library of Virginia Staff
Agency Risk Management & Internal Control Systems	DOA
NCSL/NLPES Programs, Training	NCSL/NLPES Trainers
Microsoft Office® Applications Training	Selected Staff / Outside Trainers
Geographic Information Systems / Mapping Training	Selected Staff / Outside Trainers
Lexis-Nexis Training	Legislative Services Staff
Lobbyist-in-a-box Training	DLAS, Selected Staff
Certificate in Evaluation Practice	The Evaluator's Institute
Management Skills Training	University of Richmond
<b>Ongoing Training</b>	<b>Provider</b>
CARS, Payroll, Fiscal Management Training	DOA
Software Tutorials	Tittermary, Selected Staff, DLAS
New Employee Orientation	Bishop, Lambert, Other Staff
Writing and Graphics Tutorials	Erwin
CommonHealth Activities	Papps, DHRM
Retirement System Benefits Training	VRS
Benefits Administration Training	DHRM
Records Management Training	Irby
Worker's Compensation Training	DHRM

### **COMMONHEALTH PROGRAM**

CommonHealth is the Employee Wellness Program provided by the Department of Human Resource Management, with JLARC staff serving as the agency coordinator. In addition to serving JLARC staff and their families, the CommonHealth program is also available to staff of other legislative agencies, including the House Appropriations and Senate Finance Committees.

JLARC staff have been active participants in the statewide Healthy Virginians initiative, encouraging staff to increase physical activity and decrease caloric intake. As part of this initiative, staff are encouraged to take time-out and walk an additional 15 minutes each day and participate in local charity walks. For their ongoing support of this program, JLARC staff received a Gold

Level of participation and the agency was recognized as a Healthy Workplace.

The CommonHealth program operates on a quarterly system in which the program for each quarter is pre-determined. JLARC staff will continue to participate in the program offered each quarter, in addition to the other recurring CommonHealth-sponsored programs. These programs include Future Moms, blood drives, fitness center discounts, and seasonal immunizations. Another one of these programs, a 15 minute group walk for National Employee Health and Fitness Day, is scheduled for May.

# JLARC Staff

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## **Executive Staff**

Philip A. Leone, Director  
Glen S. Tittermary, Deputy Director

## **Division Chiefs**

Robert B. Rotz, Senior Division Chief  
Harold E. Greer III, Division Chief

## **Section Managers**

Patricia S. Bishop, Fiscal & Administrative Services  
Gregory J. Rest, Research Methods  
Walter L. Smiley, Fiscal Analysis

## **Project Team Leaders**

Aris W. Bearse  
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Kimberly A. Sarte

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