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MONTANA SECRETARY OF STATE



Annual Plan

January 1, 2025

MISSION

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

AGENCY STRUCTURE

The Office of the Secretary of State has a long history in Montana. It is mentioned in the Organic Act (13 Stat. 85, Chapter 95) that was passed by the United States Congress on May 24, 1864, that created the Territory of Montana. The Office is listed as an Executive Department in the Montana Constitutions of 1884 and 1889, as well as the current Montana Constitution, originally passed in 1972. The duties and functions of the Secretary of State are outlined in the [Montana Constitution](#) and Title 2, Chapter 15, Part 4 of the Montana Code Annotated ([2-15-401, MCA](#)).

Divisions

- **Business Services Division**
 - The Business Services Division offers an extensive range of services to Montana businesses, including corporations, limited liability companies, and nonprofits. The Division assists businesses with the filing of their registration, articles of organization, assumed business name, and trademarks. Additionally, the division is responsible for filing and maintaining records under the Uniformed Commercial Code (UCC).
- **Elections and Voter Services Division**
 - The Elections and Voter Services Division assists Montana voters, candidates, and election officials. The Division interprets election laws and provides guidance to ensure uniformity across Montana elections.
- **Operations Division**
 - The Operations Division provides a variety of services both internally to the Office and externally to the public. The Division's primary functions include Human Resources, Communications, Fiscal Management, Information Technology and Security, Official Records, Records Management, Administrative Rules, and Notary.

INITIATIVES

- **Implement a fresh visual appeal with enhanced usability in alignment with the evolving needs of our customers.**
 - Objectives:
 - Enhance the Secretary of State's website to ensure the ease of use and availability of relevant information.
 - Review all forms for format, plain language, and accessibility, and refresh as needed.
 - Enhance relevance by taking a fresh look at recurring correspondence before sending it again.

- Prioritize enhancements of the Business Enterprise system to support the system's ease of use for Montana businesses.
 - Monitor trends, customer needs and expectations.
- Measurements:
 - A usability study of the SOS website is completed.
 - SOS forms are updated.
 - Development tasks are completed within scheduled timeline.
 - Customer feedback is positive.
- **Retain a highly engaged workforce to serve the citizens of Montana.**
 - Objectives:
 - Maintain our culture of community for employees.
 - Provide opportunities for employees to grow and develop.
 - Provide meaningful feedback through regular performance appraisals.
 - Provide cross-training opportunities and build a succession plan.
 - Conduct employee engagement surveys and stay interviews.
 - Measurements:
 - Utilize employee engagement surveys and stay interviews to assess engagement levels and develop future strategies.
 - Review appraisals to assess performance level.
 - Solicit and review customer feedback.
 - Analyze HR statistics to address human resource decisions.
- **Enhance training and materials to grow the expertise of external stakeholders.**
 - Objectives:
 - Utilize partnerships to create and disseminate relevant information and materials.
 - Provide meaningful in-person or electronic training by strategically developing the agenda topics, presenters, etc.
 - Create educational videos.
 - Visit stakeholders across Montana to share information, provide training, and enhance relationships.
 - Measurements:
 - Utilization of partnerships.
 - Training surveys provide positive feedback.
 - Development of educational video and other resource materials.
 - Productive Montana stakeholder visits.
- **Improve procedures through technology services and process re-engineering.**
 - Objectives:
 - Enhance accessibility of records through electronic storage.

- Utilize technology platforms that allow paper-based services to be performed electronically.
 - Explore technology solutions that assist with customer service through the accessibility of information.
- Measurements:
 - Improved searchability and accessibility of records.
 - Services are offered electronically.
 - Reduced call volume due to customer ability to find information on their own.
- **Conduct public outreach to communicate relevant information to the voters, business community, and all SOS customers.**
 - Objectives:
 - Use various mediums to expand reach, including social media, emails, post cards, mailings, public service announcements, etc.
 - Attend events around the state in which the attendees would benefit from information from the Secretary of State's Office such as Montana business activity, election information, voter registration, notary services, the Montana Constitution, etc.
 - Distribute MT and US Constitutions to schools, individuals, and organizations as a public service.
 - Utilize a Media Center to communicate information to the press and public.
 - Measurements:
 - Track the reach of the various outreach opportunities through website clicks, views, mailings, attendance, etc.