

# Oregon Legislative Fiscal Office and State of Oregon Budget

January 2019

# Constitutional Responsibility of the Legislature: To balance the budget

Article IX, Section 2: Legislature to provide revenue to pay current state expenses and interest

The Legislative Assembly shall provide for raising revenue sufficiently to defray the expenses of the State for each fiscal year, and also a sufficient sum to pay the interest on the State debt, if there be any.

Article IX, Section 4: Appropriation necessary for withdrawal from treasury

No money shall be drawn from the treasury, but in pursuance of appropriations made by law.

Article IX, Section 6: Deficiency of funds; tax levy to pay

Whenever the expenses, of any fiscal year, shall exceed the income, the Legislative Assembly shall provide for levying a tax, for the ensuing fiscal year, sufficient, with other sources of income, to pay the deficiency, as well as the estimated expense of the ensuing fiscal year.

# Oregon's Budget Policy

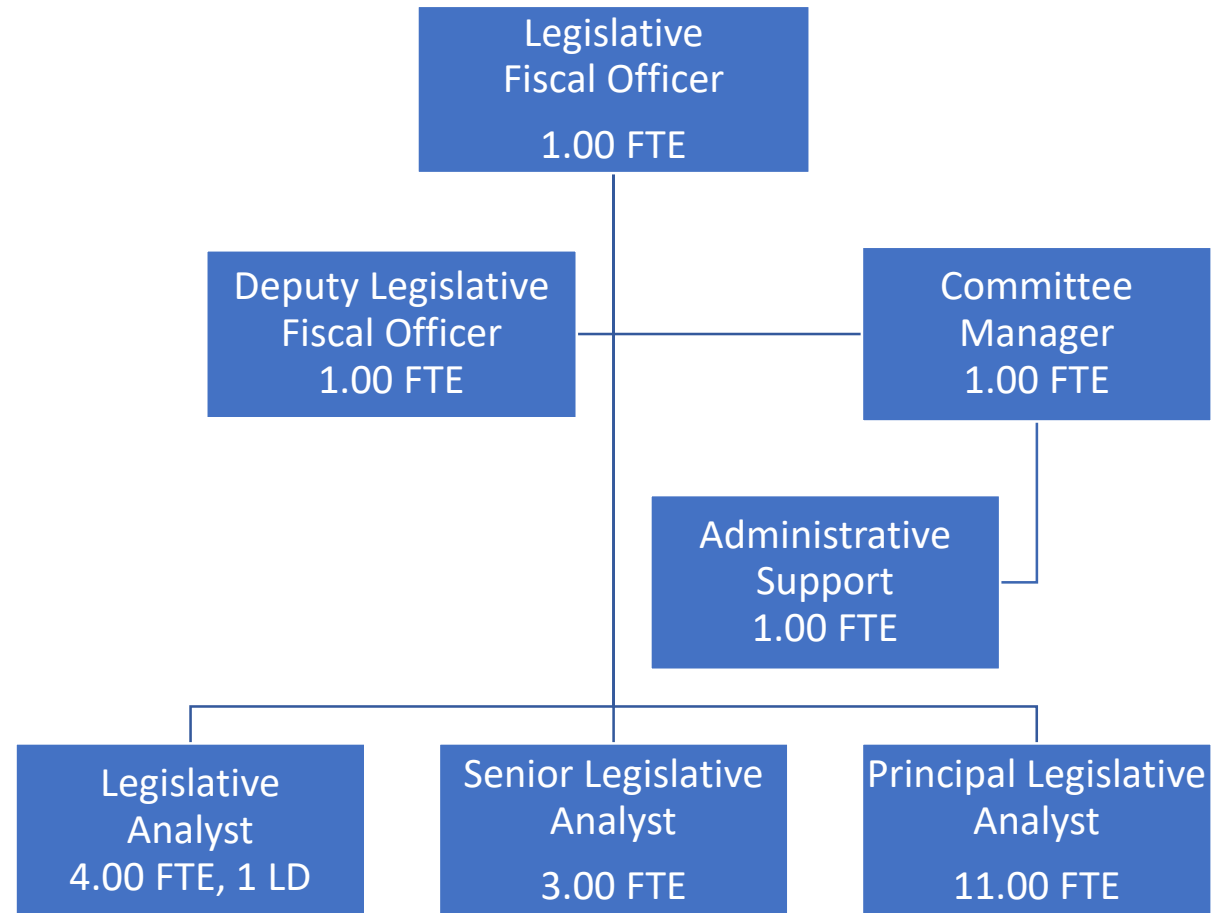
Based on principles of:

- Balancing estimated revenues and proposed expenditures
- Allocating resources to achieve desired outcomes
- Measuring program outcomes and progress toward desired outcomes
- Encouraging savings and investments that reduce or avoid future costs
- Planning for the short term and the long term, using consistent assumptions on demographics and trends
- Providing accountability at all levels for meeting program outcomes

# What is the Legislative Fiscal Office (LFO)?

- Non-partisan, independent, permanent professional support staff office to the Legislature that was created in 1959
- Mission is to provide objective research, analysis, and evaluation of state expenditures, financial affairs, program administration, and agency operations; LFO also provides staffing to several legislative committees
- Staff consists of a director, a deputy, 18 analysts, a committee manager, and an administrative support
- Each analyst has a portfolio of agencies with which they work

# LFO Organization Chart



# LFO Analyst Responsibilities During Session

- Review agency budgets for accuracy
- Analyze fiscal and policy issues
- Examine revenue sources, expenditure limitations, expenditure patterns, staffing levels, and proposed law changes
- Review impact of budget reductions or enhancements
- Make recommendations to the Legislature related to agency budgets
- Prepare fiscal impact statements
- Respond to questions and collect information requested by legislators
- Facilitate bill amendments, budget note and budget report finalization, and presentation of Ways and Means Subcommittee decisions for the Full Ways and Means Committee
- Assist bill carriers on the House and Senate floors

# Other Staffing Responsibilities

- Emergency Board is a constitutional body responsible for making certain allowable budget adjustments when the Legislature is not in session
- Joint Legislative Audit Committee is responsible for reviewing audits, conducting evaluations, and making recommendations for change based on audit findings
- Joint Legislative Committee on Information Management and Technology is responsible for establishing statewide policy on information systems and technology and making recommendations on information resource management programs and information technology acquisitions
- Transparency Oregon Advisory Commission is responsible for making recommendations to the Department of Administrative Services on the creation, contents, operations, and enhancements to the state's transparency website

# Staff Responsibilities During the Interim

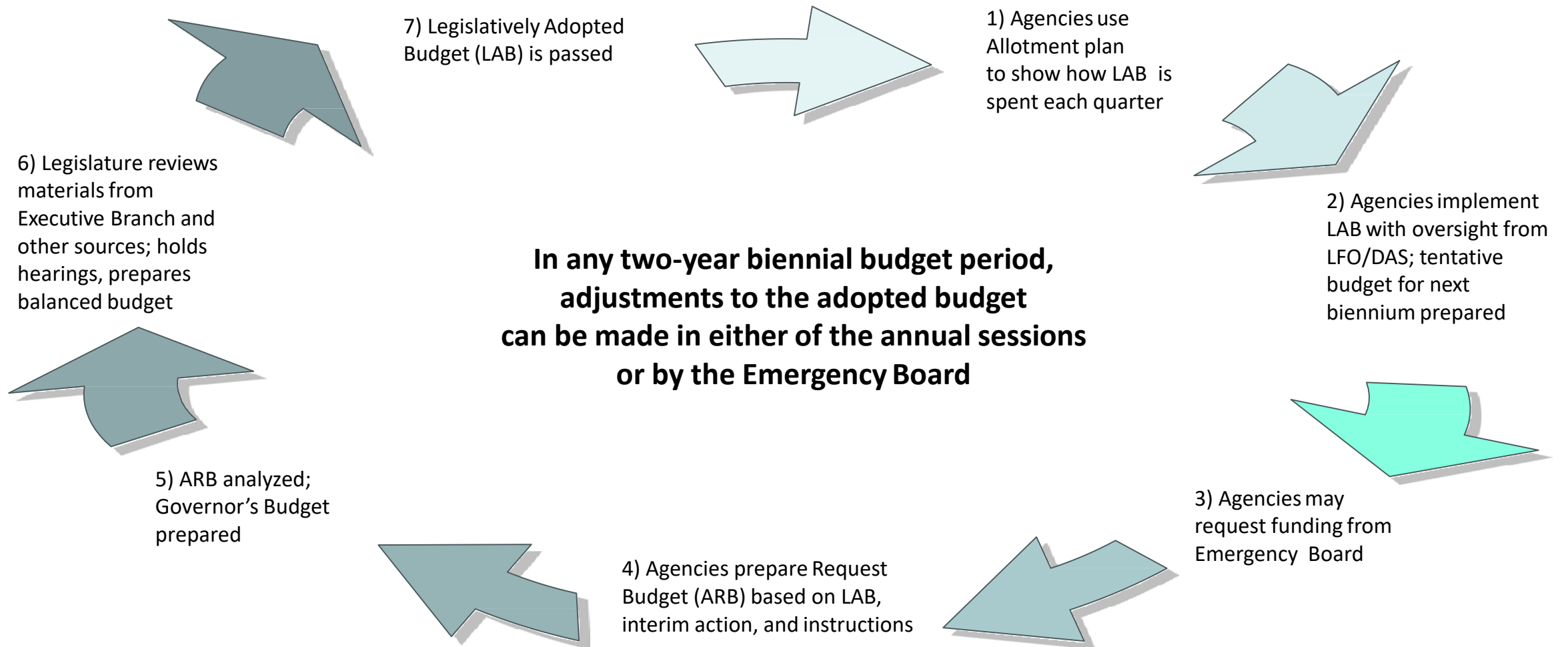
- Publish highlights report of session budgetary actions and detailed analysis reports of the legislatively adopted budget by agency and program
- Publish briefs and reports on budget-related topics and issues of interest to the Legislature
- Produce analysis and recommendations on agency requests for Emergency Board action
- Review state agency budget execution and operations
- Monitor agency expenditures and program implementation
- Respond to inquiries from legislators, press, agencies, citizens, NCSL, etc.



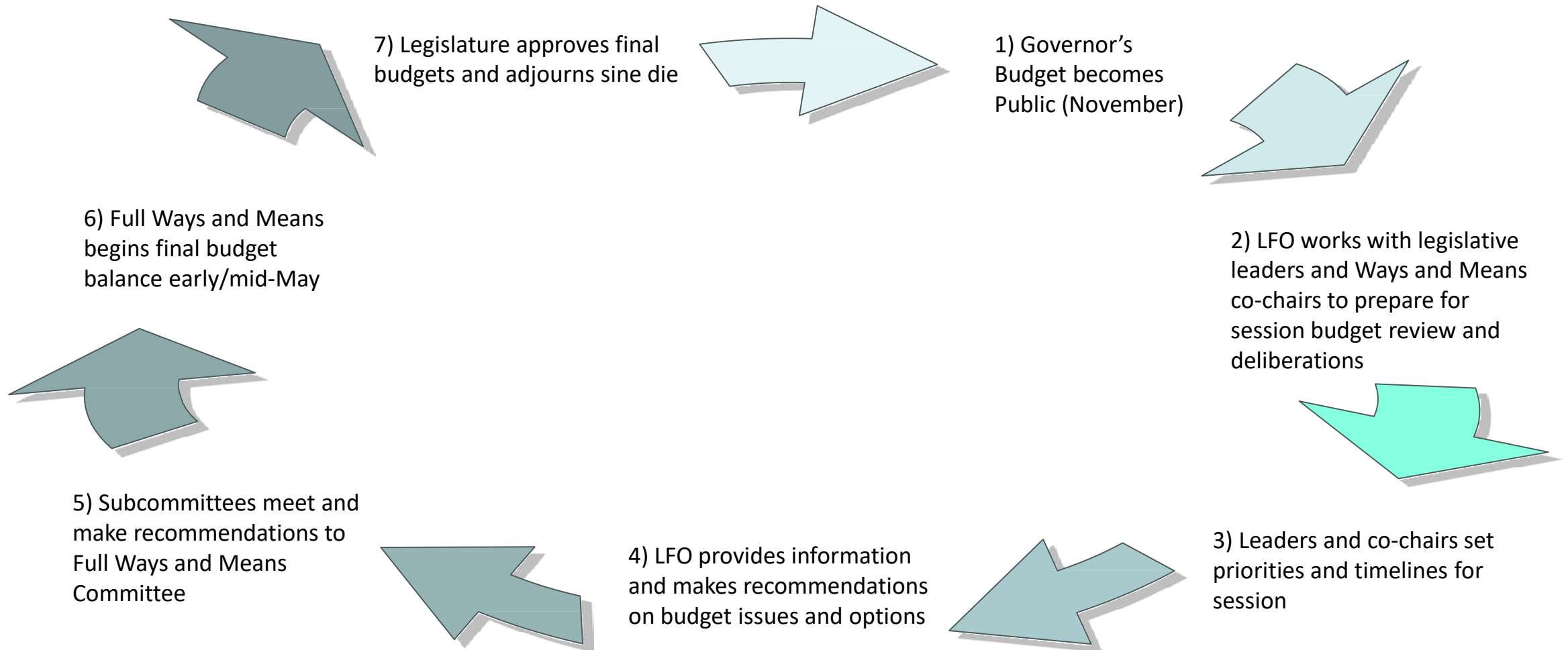
# Oregon's Two-Year Budget Cycle

- Oregon budgets on a biennial basis
  - July 1<sup>st</sup> of odd-numbered year to June 30<sup>th</sup> of next odd-numbered year
  - Currently 19 months into the 2017-19 biennium; started creating the 2019-21 biennium budget in March 2018
- 2019 Legislative Session (January to June)
- 2019 Short Interim (July to January)
  - Interim Joint Ways and Means only makes recommendations
- 2020 Legislative Session (February)
  - Recommendations from Interim Joint Ways and Means or new items
- 2020 Long Interim (March to December)
  - Emergency Board
  - Budget development for next biennium

# Oregon's Two-Year Budget Cycle



# Oregon Budget Process – Long Legislative Session



# Budget Basics – Fund Types

## 1) General Fund – appropriation

- Primarily personal and corporate income taxes, estate and inheritance taxes, corporate excise taxes; 7% other (i.e., liquor revenue)
- “Fungible”

## 2) Lottery Funds – allocation

- Sale of tickets and video lottery gaming proceeds, associated interest and penalties
- Dedicated to economic development, education, parks/salmon habitat, veterans

## 3) Other Funds – limitation

- Fees, interest earnings, excise taxes, dedicated fee or tax revenue (9-1-1 tax, lodging tax, forest harvest tax, vehicle and gas tax, etc.), bond proceeds
- Dedicated by law for specific purposes
- Limited and Nonlimited
  - Nonlimited: debt service, cost of issuance, Unemployment Insurance benefit payments

## 4) Federal Funds – limitation

- Grants, formula funds from federal agencies such as HUD, HHS
- Dedicated by law for specific purposes
- Limited and Nonlimited
  - Nonlimited: federally funded food and housing vouchers

# Budget Basics – Expenditure Categories

- Personal Services includes personnel costs (wages, PERS, benefits, social security, etc.)
- Services and Supplies includes operation costs (travel, office supplies, rent, legal expenses, expendable property, contracts, etc.)
- Capital Outlay includes products with value of more than \$5,000, life of more than two years, used more than once
- Capital Improvement includes construction, remodel, improvement costs of less than \$1 million
- Major Construction/Acquisition (or Capital Construction) includes construction, remodel, improvement costs of more than \$1 million; established for a six-year period
- Debt Service includes principal and interest payments on bonds and certificates of participation

Budget also tracks positions and FTE (full-time equivalent)

# Budget Basics – Appropriation Bills

- Appropriation bills are the budgetary control
- Appropriation bills are session law (Oregon Laws)
- Appropriation bills are by fund type and may be total agency or detailed to program within agency
- Appropriation bills are not detailed to the expenditure category level
- Budget reports accompany appropriation bills or policy bills with appropriation amendments

# Budget Basics – Budget Bills

- Appropriation bills are generally agency specific (House bills = 5000 series, Senate bills = 5500 series)
- Oregon has approximately 80 agencies under budgetary control
- Range from small (\$300,000 biennial budget) to large (\$22 billion biennial budget)
- Budget for bonding and capital construction are in bills separate from agency budget bills
- Article IX, Section 7, Oregon Constitution limits appropriation bills to state current expenses (no other subject allowed)
- Final bills of session are commonly known as the Program Change bill and the Omnibus Budget Reconciliation (a.k.a. Emergency Fund) bill

# Budget Basics: “Budget Math”

Agency Budget Bill

+ Policy Bills

+ Omnibus Budget Reconciliation (a.k.a. Emergency Fund) Bill

+ Capital Construction Bill

= Legislatively Adopted Budget



# Budget Reports

- LFO Work Session Recommendations become the basis for the budget report
  - Key Performance Measures are reviewed and approved as part of the LFO recommendation
- Accompany appropriation bills or policy bills with appropriation amendments
- Provide details on legislative action and intent for a budget bill or a policy bill with a budgetary impact (will have expenditure category detail)
- Contain detailed information on approved Policy Option Packages
- Include position authorization and full-time equivalents

# Subcommittee Role and Responsibilities

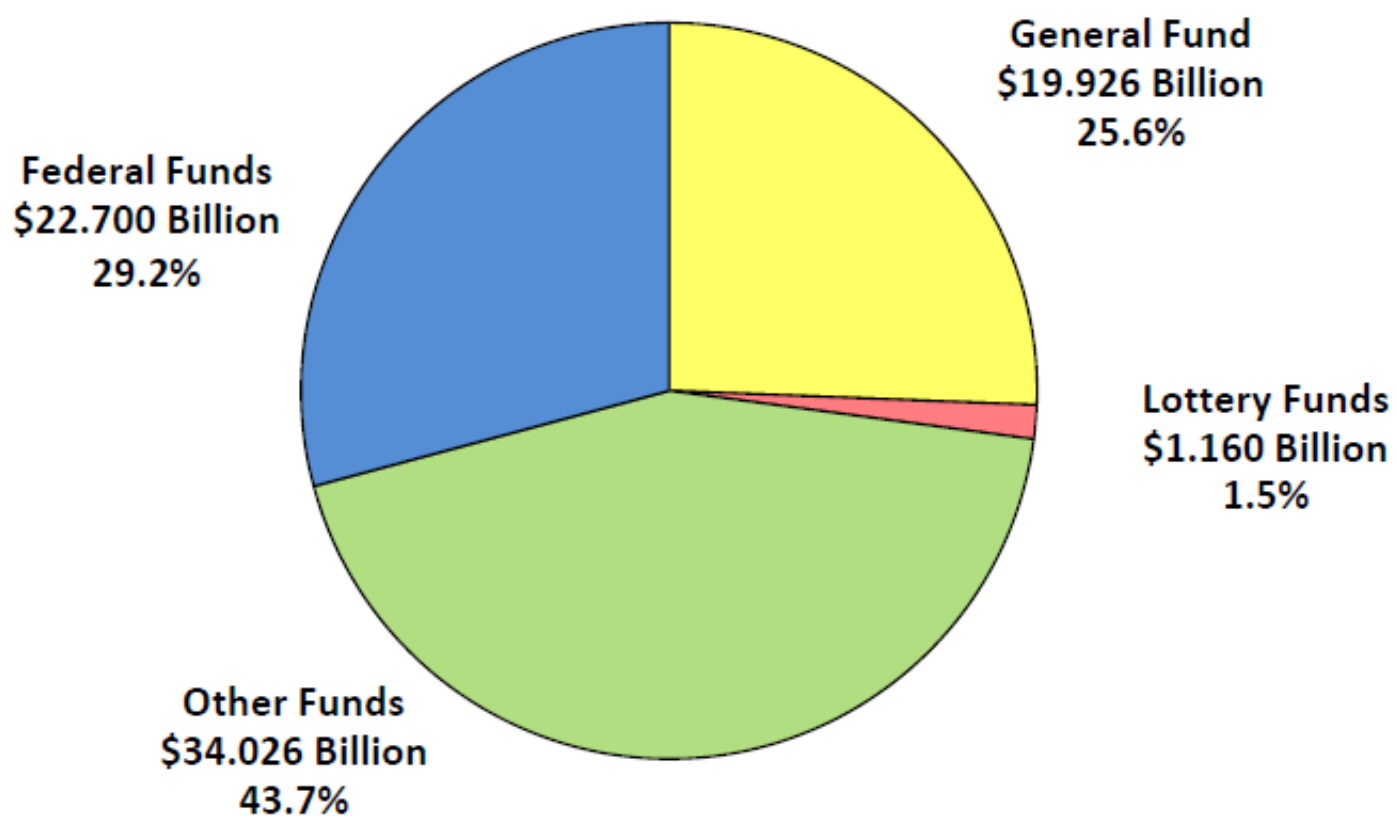
- Budget (Appropriation) Bills
- Agency Budget Presentations: Consist of Phase 1/Phase 2 (Agency Profile/Discussion of Issues) and Phase 3 (Work Session)
- Budget Notes: Included in a budget report to provide budget execution direction to agency
  - Cannot be used in lieu of legislation
  - Does not have the force of law
- Federal Grant Applications: Statute requires approval from either Joint Committee on Ways and Means or Emergency Board

# Subcommittee Role and Responsibilities (cont.)

- Reports: When required by budget report, subcommittee instructions, or statute
- Fee-Related Bills: Generally tied to an agency's budget request
- Policy Bills: Directly referred to Ways and Means or subsequently referred after being heard in a policy committee; often have a financial impact or may be tied to assumptions in an agency budget

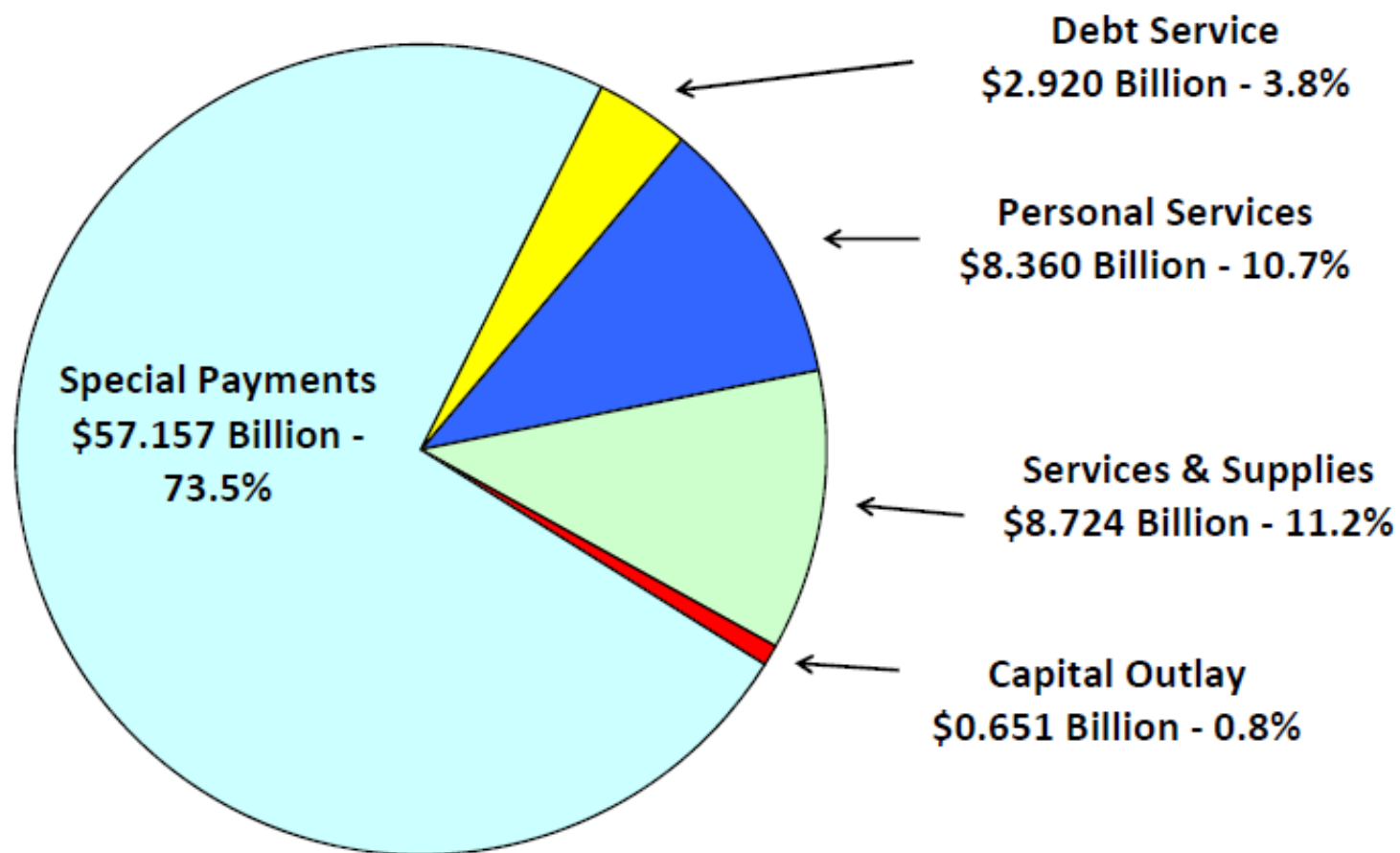
## 2017-19 Legislatively Approved Budget Totals \$77.812 Billion

8.3% Increase from 2015-17 Approved



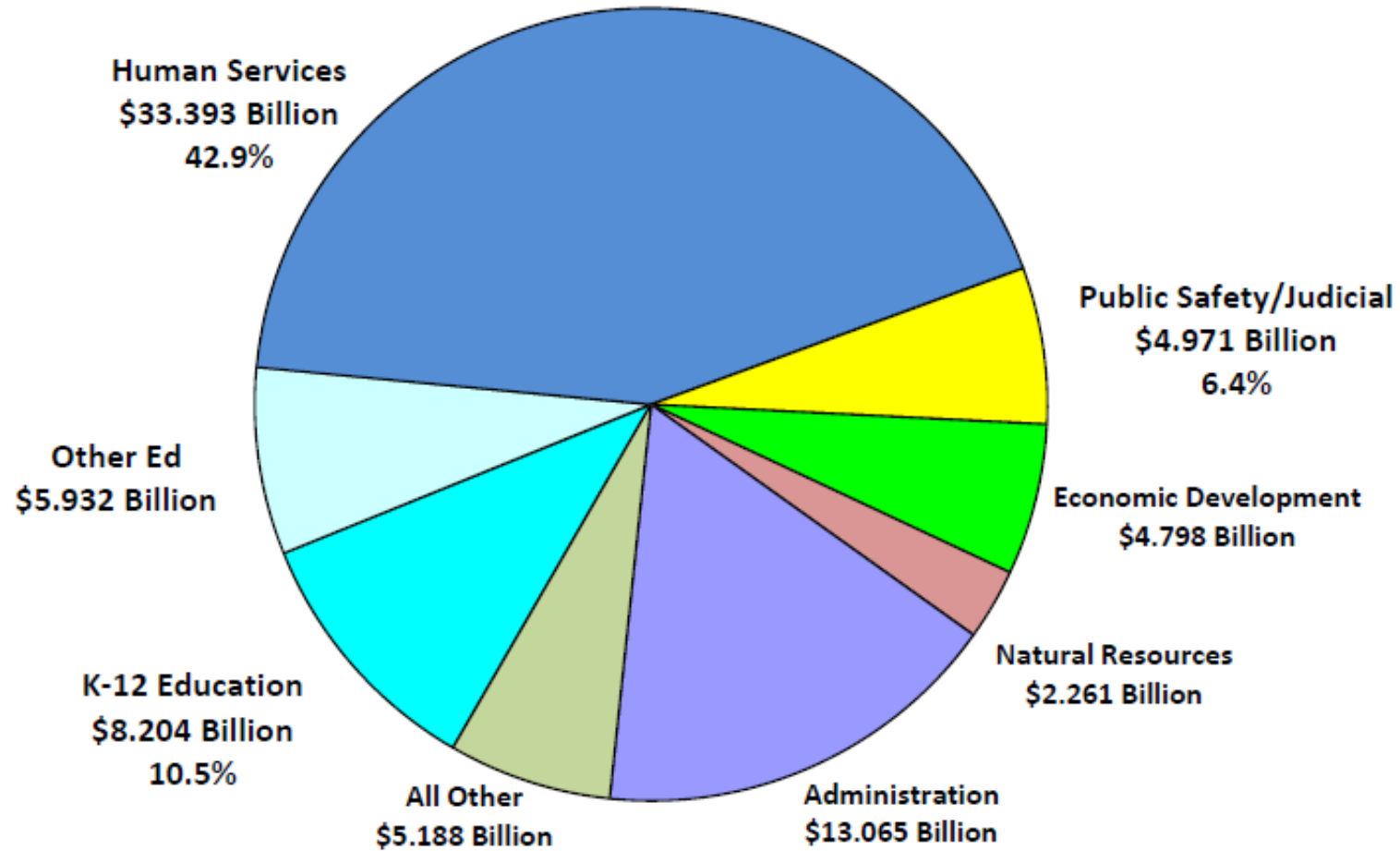
## Expenditures by Category

Total Funds - 2017-19 Legislatively Approved Budget  
(through December 2018; \$77.8 Billion)



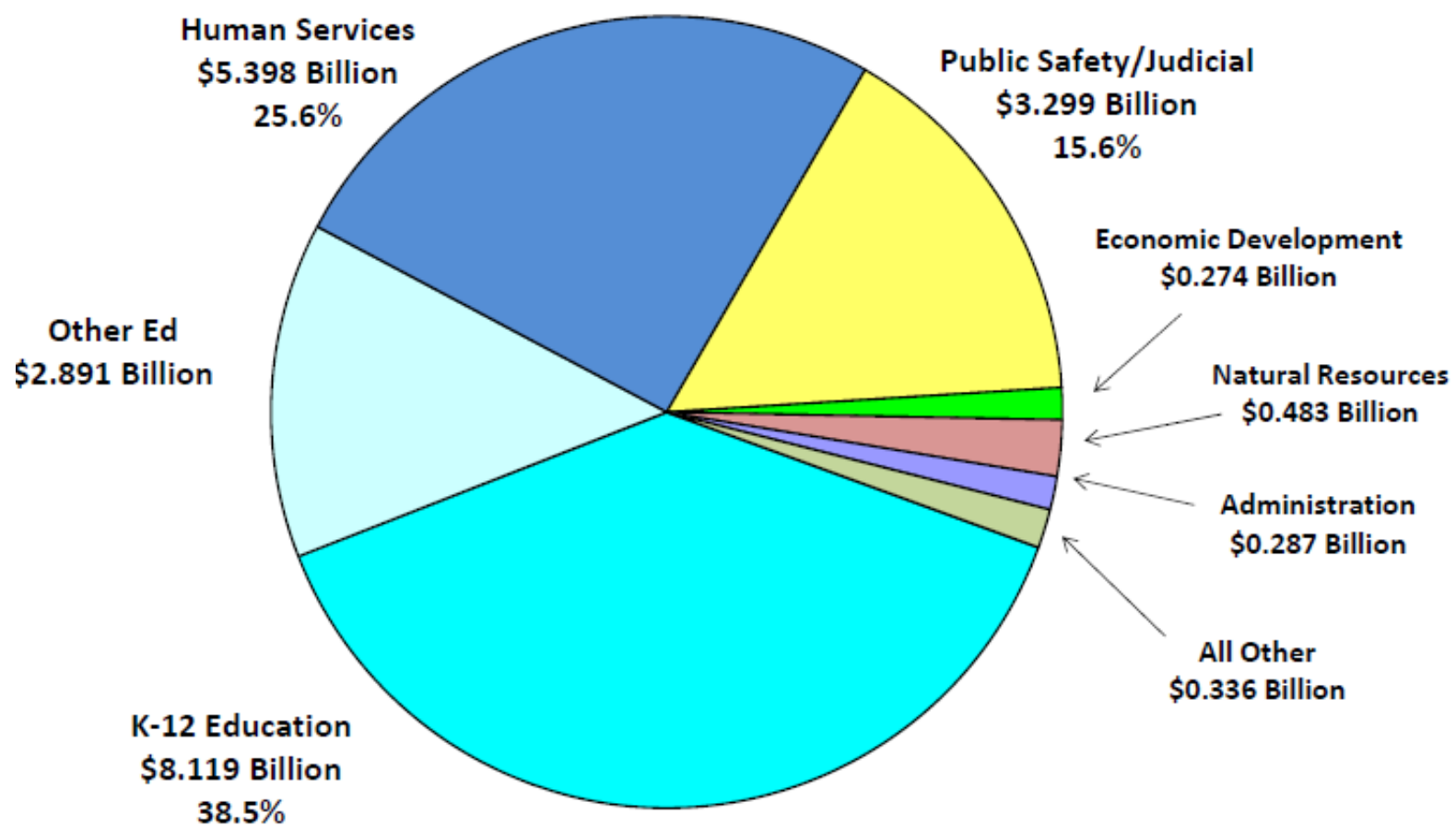
## 2017-19 Legislatively Approved Budget - Total Funds \$77.812 Billion

8.3% Increase from 2015-17 Approved  
(through the Dec. 2018 Emergency Board Meeting)

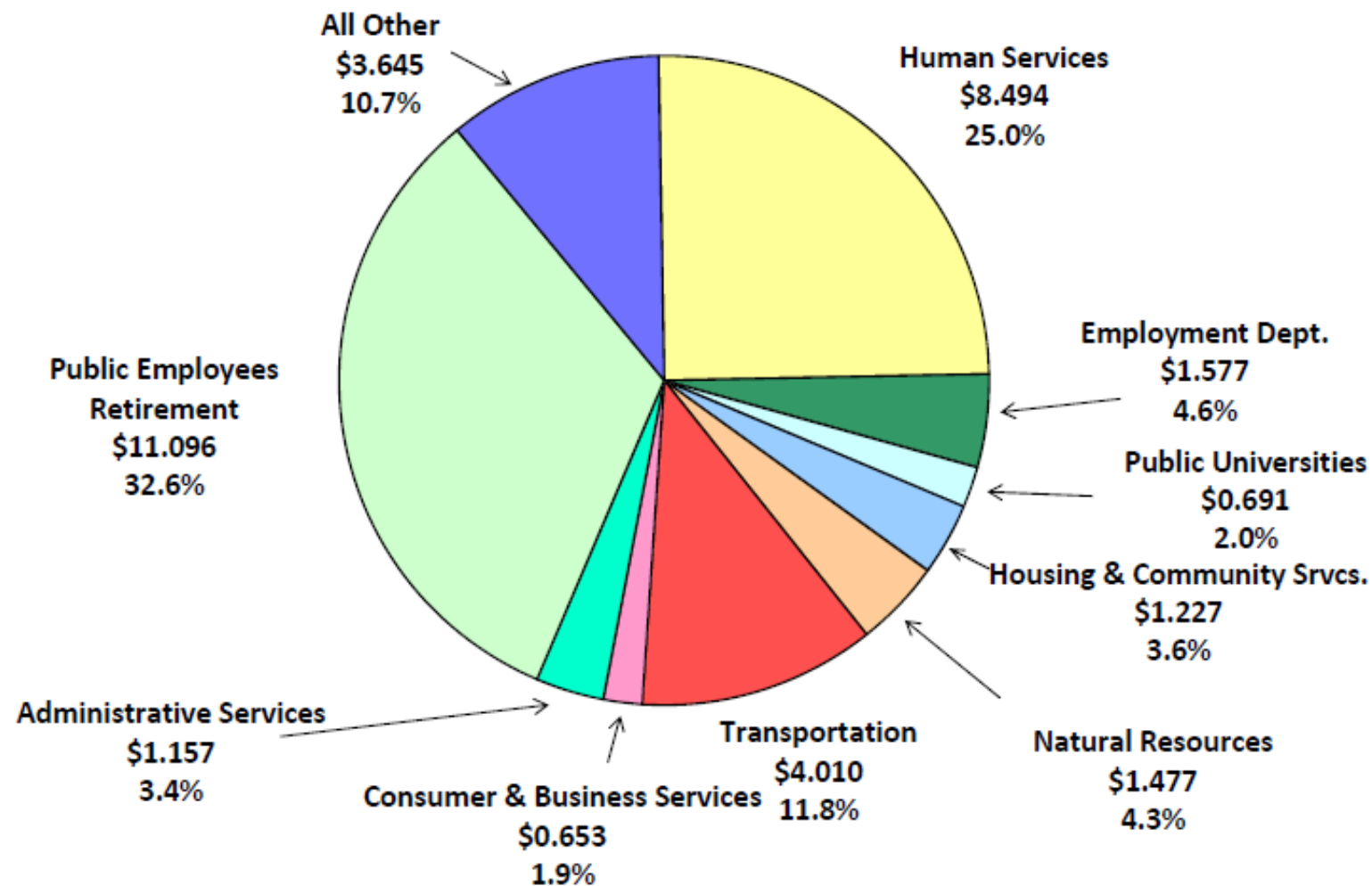


## 2017-19 General Fund & Lottery Funds Approved Total \$21.086 Billion

11.2% Increase from 2015-17 Approved  
(through the Dec. 2018 Emergency Board Meeting)

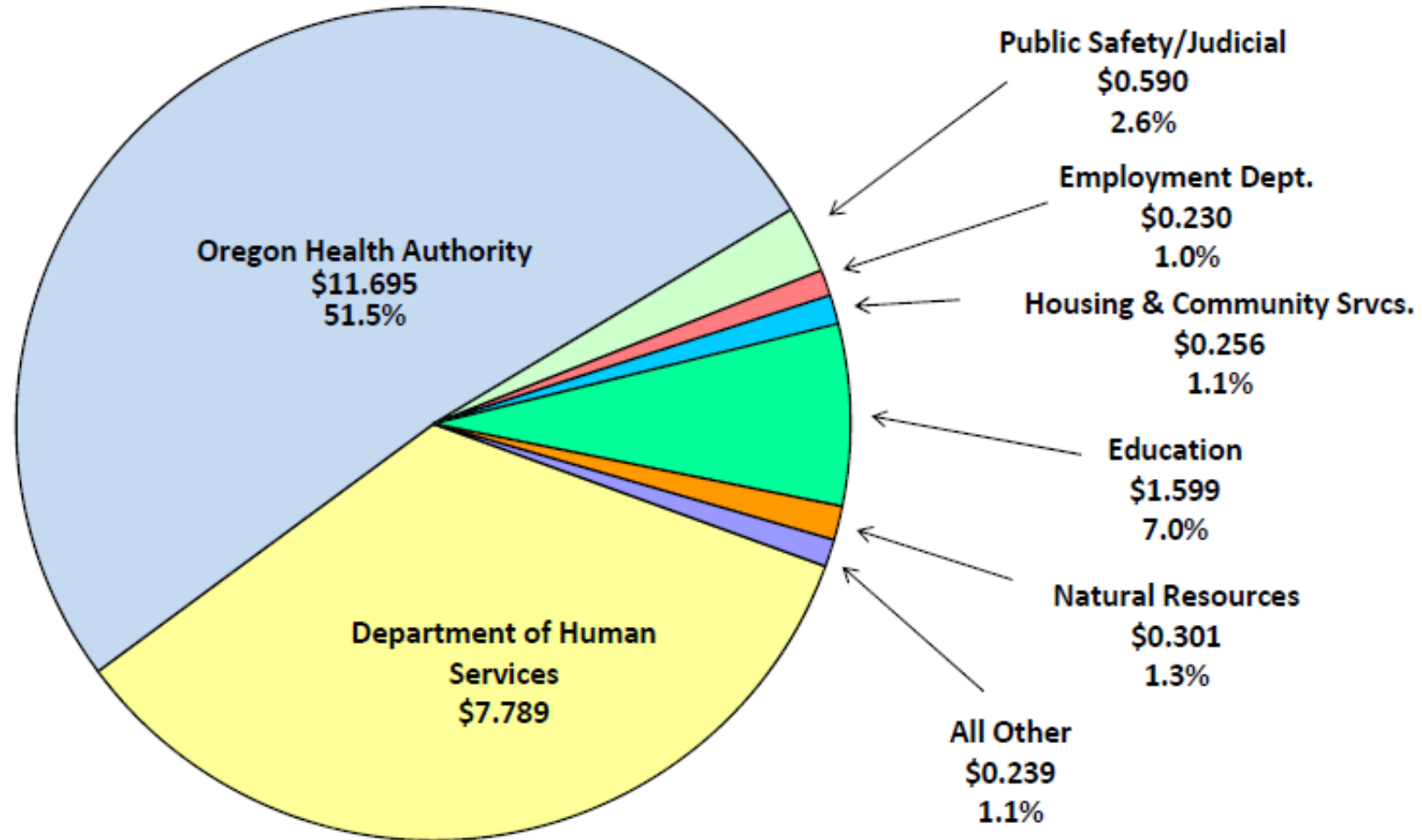


**2017-19 Other Funds Total \$34.026 Billion**  
**10.4% Increase from 2015-17 Approved Expenditures**  
(Billions of Dollars/Percent of Total; through Dec. 2018 Emergency Board Meeting)

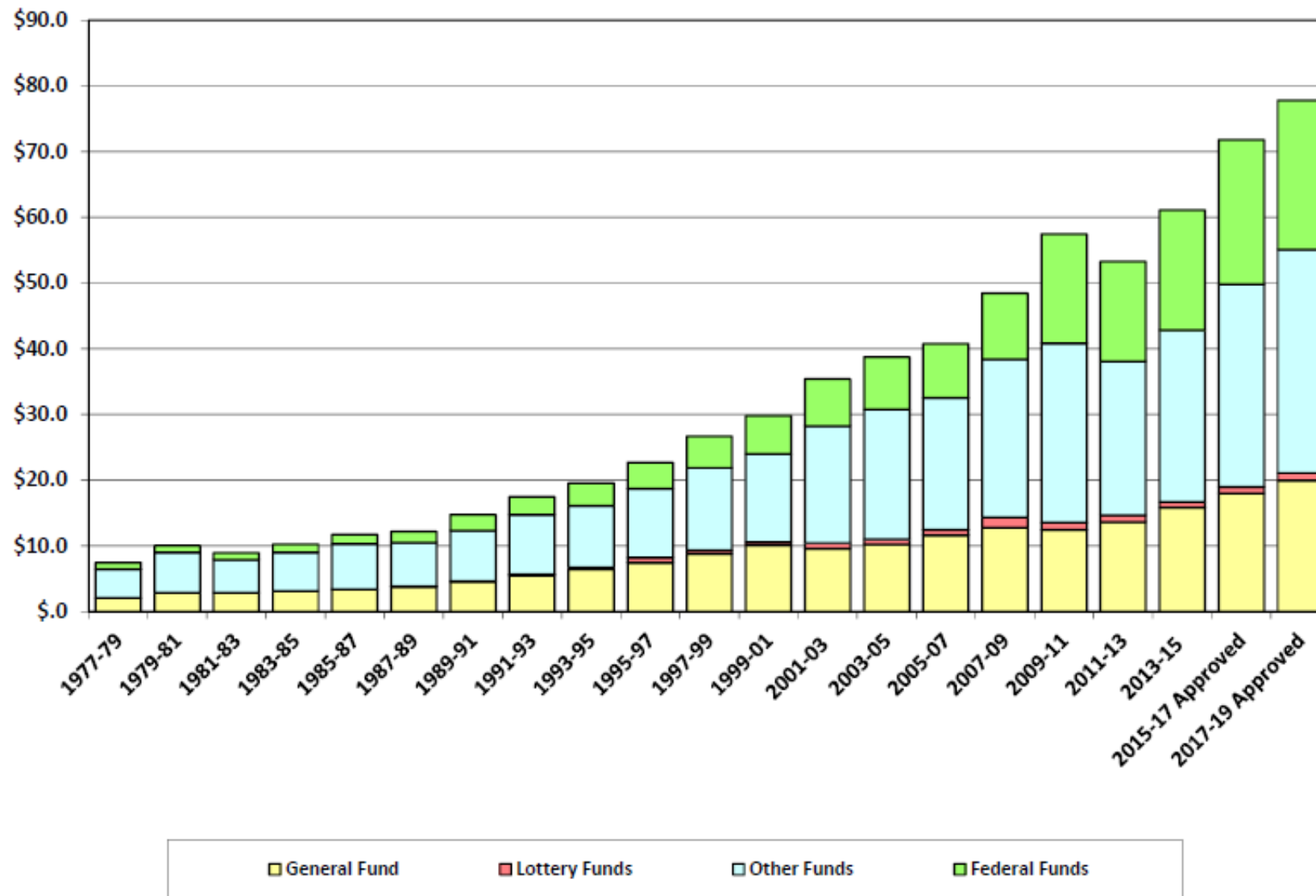




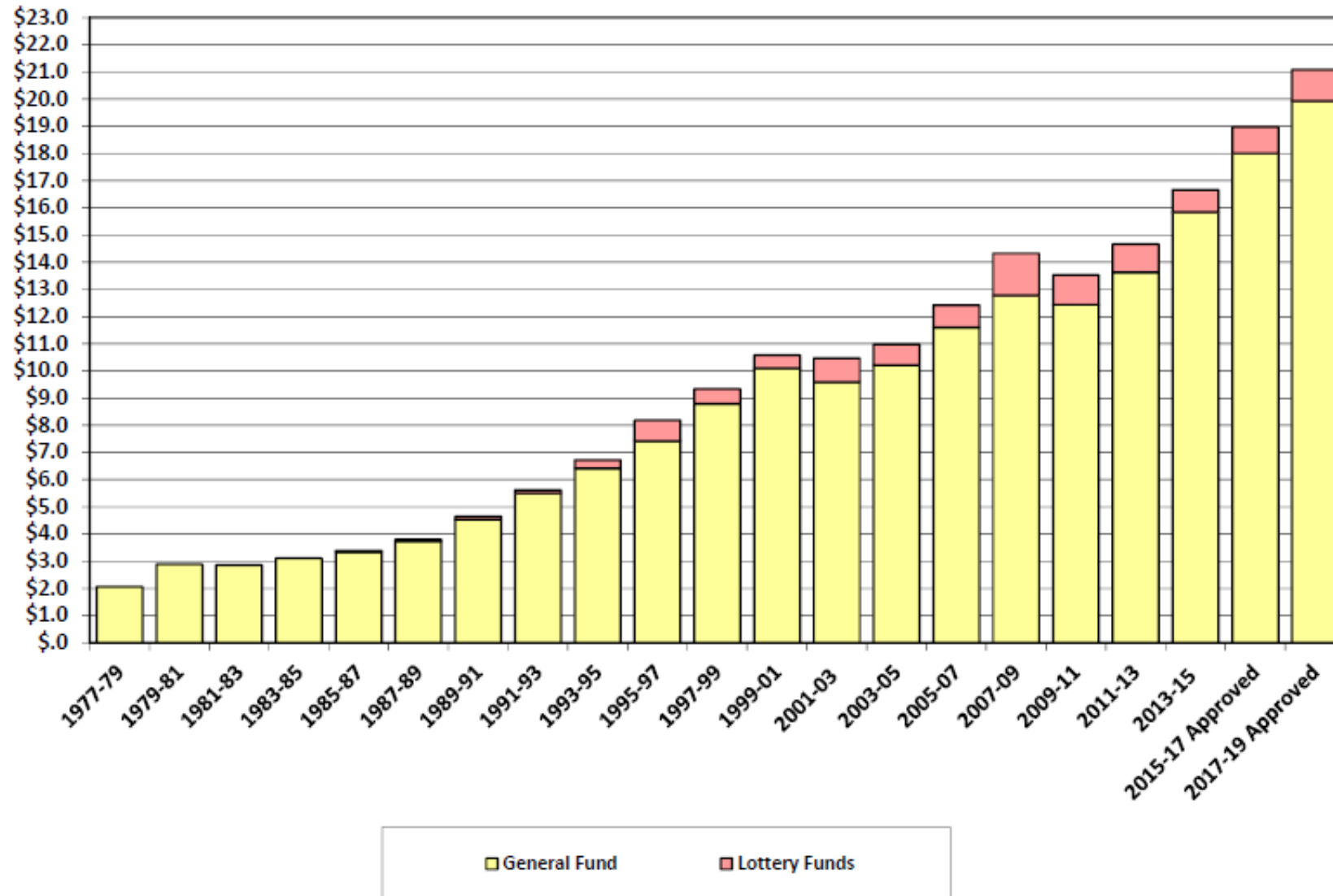
**2017-19 Federal Funds Total \$22.700 Billion**  
**3.0% Increase from 2015-15 Approved Expenditures**  
(Billions of Dollars/Percent of Total; through Dec. 2018 Emergency Board Meeting)



Oregon Budget History -- All Funds  
(Billions \$)



Oregon Budget History -- General Fund and Lottery Funds  
(Billions \$)



# Oregon 2019-21 Budget Information

# Budget Issues

## Key Drivers of Budget Change:

- Population Growth
- Demographics
- Inflation
- Health Care Costs
- Mandated Caseloads
- Federal Policy Changes
- Lawsuits
- Initiatives
- Rollup Costs
- Public Employees Retirement System
- Replacement of One-Time Revenues
- State Policy Decisions

# Budget Issues Facing 2019 Legislature

- Rebalancing the 2017-19 budget
- Revenue forecast changes
- Potential difficulty continuing current General Fund programs and services
- Governor and other stakeholder budget proposals
- Potential Issues (e.g., lawsuits, decreased federal funding)
- State employee and non-state employee compensation
- Responding to successful ballot initiatives
- 2021-23 tentative budget and revenue forecast

# Current Service Level Budget Adjustments

- Personal Service adjustments for 2019-21
- Debt Service adjustments
- Program phase-in costs for new programs that did not operate for the entire biennium
- Program phase-out savings for programs that will be discontinued or were one-time
- Inflation for most services, supplies, capital outlay, professional services
- Mandated caseload increases or decreases
- Fund shifts – replace one-time funds

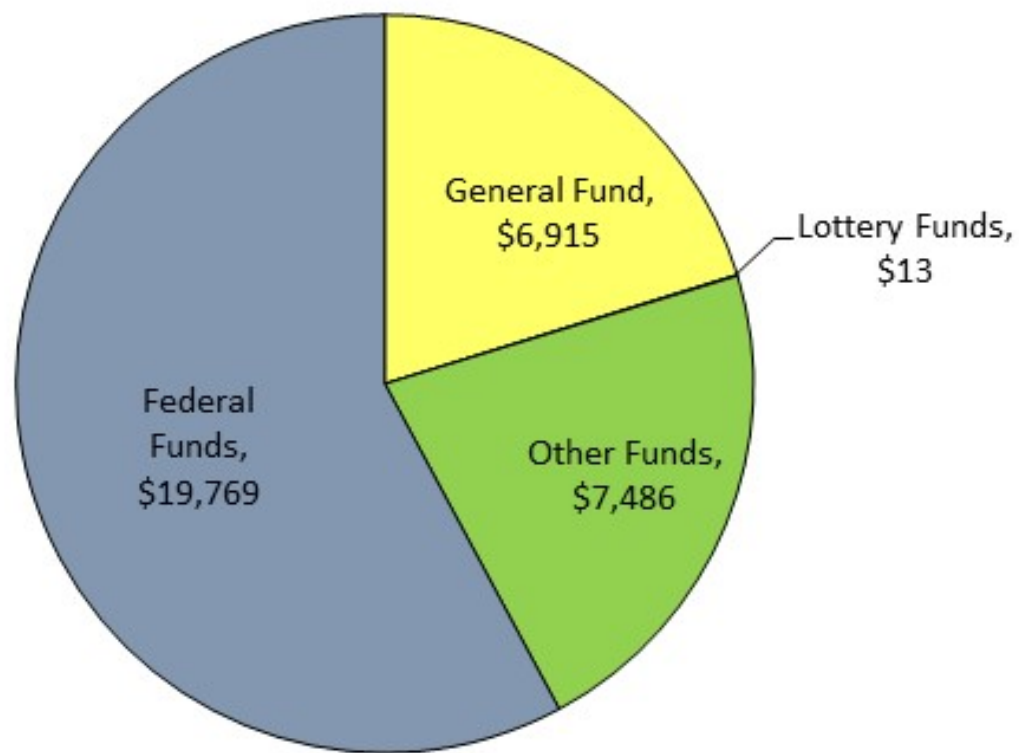
# Human Services Subcommittee/Program Area Budget Information



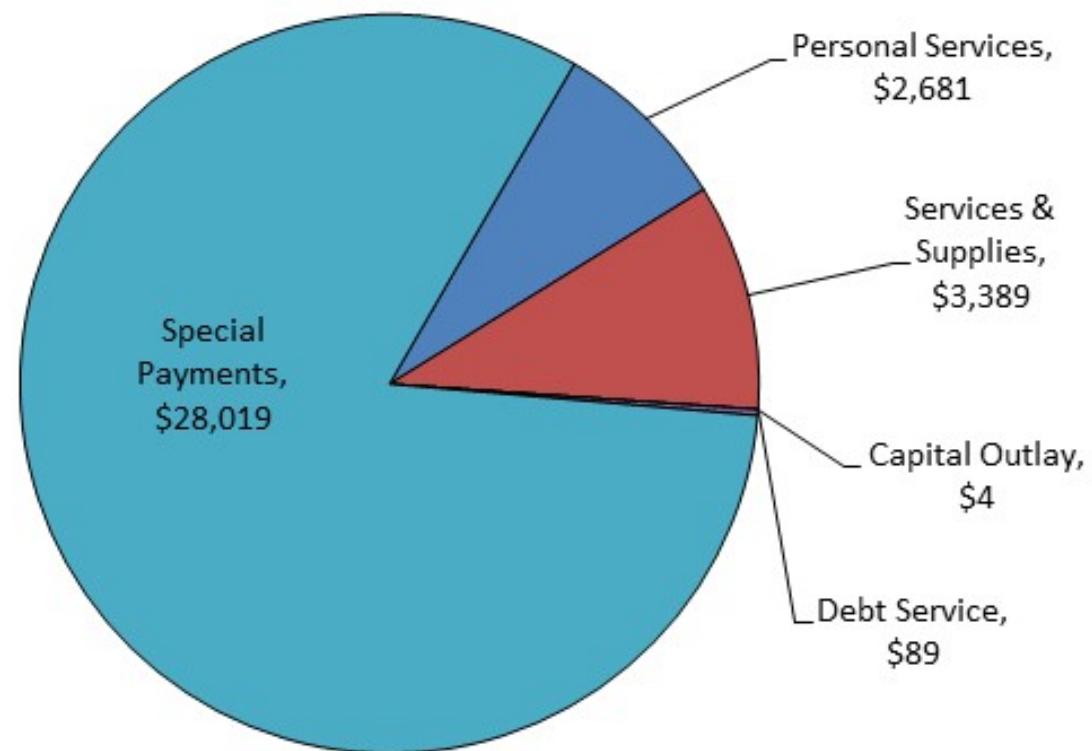
# Agency Budget History: 2015-17 Actual to 2019-21 Governor's Budget (Dollars in Millions)

	2015-17 Actual			2017-19 Legislatively Approved Budget at December 2018			2019-21 Current Service Level			2019-21 Governor's Budget		
	General Fund	Total Funds	FTE	General Fund	Total Funds	FTE	General Fund	Total Funds	FTE	General Fund	Total Funds	FTE
<b>HUMAN SERVICES</b>												
<b>PROGRAM AREA AGENCIES</b>												
Dept of Human Services (DHS)												
--Vocational Rehabilitation	25.0	110.8	258.09	29.5	117.5	258.25	35.6	121.1	257.04	35.3	122.3	260.04
--Intell/Developmental Disabilities	750.6	2,383.3	893.69	880.5	2,719.0	909.70	997.4	2,910.2	912.42	988.6	2,916.0	895.94
--Self-Sufficiency	437.7	2,969.1	2,034.49	395.2	3,252.7	2,358.29	457.9	3,335.3	2,519.10	445.9	3,349.8	2,517.10
--Child Welfare	396.0	913.0	2,544.82	601.1	1,175.0	2,761.73	705.5	1,337.2	3,081.46	761.9	1,327.2	3,045.70
--Aging and People with Disabilities	866.7	3,011.9	1,337.90	1,019.0	3,540.5	1,407.26	1,207.6	3,861.2	1,447.97	1,232.0	3,900.4	1,489.22
--Central, Shared Services, SAEC	238.0	541.6	808.91	281.2	858.0	921.69	319.0	766.4	866.51	333.5	935.1	914.81
<b>Total DHS</b>	<b>2,714.0</b>	<b>9,929.6</b>	<b>7,877.90</b>	<b>3,206.5</b>	<b>11,662.8</b>	<b>8,616.92</b>	<b>3,723.1</b>	<b>12,331.3</b>	<b>9,084.50</b>	<b>3,797.2</b>	<b>12,550.8</b>	<b>9,122.81</b>
Oregon Health Authority (OHA)												
--Health Systems Division	1,429.5	14,269.5	609.97	1,335.8	16,050.5	458.20	2,317.9	16,008.6	289.63	1,568.5	16,183.3	321.53
--Health Policy and Analytics	22.2	112.4	130.04	46.3	193.8	129.57	48.1	197.5	147.30	51.3	195.3	150.60
--Public Employees' Benefit Board	0.0	1,846.2	18.50	-	2,046.8	18.50	-	2,098.8	18.50	-	2,099.7	20.50
--Oregon Educators Benefit Board	0.0	1,507.3	22.00	-	1,709.9	19.00	-	1,739.5	19.00	-	1,740.4	21.00
--Public Health	39.8	512.6	760.59	65.3	640.5	741.37	73.3	671.0	731.11	83.3	725.4	751.11
--Oregon State Hospital	453.7	516.8	2,268.82	491.2	573.7	2,279.45	494.3	603.4	2,282.82	500.8	608.1	2,314.32
--Central, Shared Services, SAEC	207.1	569.5	584.48	227.0	483.2	635.71	243.4	499.2	608.11	237.7	496.1	642.11
<b>Total OHA</b>	<b>2,152.4</b>	<b>19,334.3</b>	<b>4,394.40</b>	<b>2,165.6</b>	<b>21,698.3</b>	<b>4,281.80</b>	<b>3,177.0</b>	<b>21,818.1</b>	<b>4,096.47</b>	<b>2,441.5</b>	<b>22,048.2</b>	<b>4,221.17</b>
Commission for the Blind	3.7	18.8	52.21	3.5	21.7	62.53	4.3	22.0	65.00	6.6	24.2	66.00
Psychiatric Security Review Board	2.7	2.7	11.00	3.0	3.1	11.00	3.2	3.2	11.00	3.2	3.2	11.00
Long Term Care Ombudsman	4.9	5.6	24.50	6.4	7.3	25.50	7.2	8.2	26.50	7.6	8.4	28.00
<b>Program Area Total</b>	<b>4,877.6</b>	<b>29,291.0</b>	<b>12,360.01</b>	<b>5,385.1</b>	<b>33,393.1</b>	<b>12,997.75</b>	<b>6,914.8</b>	<b>34,182.8</b>	<b>13,283.47</b>	<b>6,256.1</b>	<b>34,634.8</b>	<b>13,448.98</b>
<b>OTHER AGENCIES</b>												
Board of Nursing	-	15.4	48.49	-	16.8	48.90	-	17.9	48.90	-	19.3	53.90
Oregon Medical Board	-	10.2	39.00	-	12.8	40.00	-	13.3	40.00	-	13.6	41.00

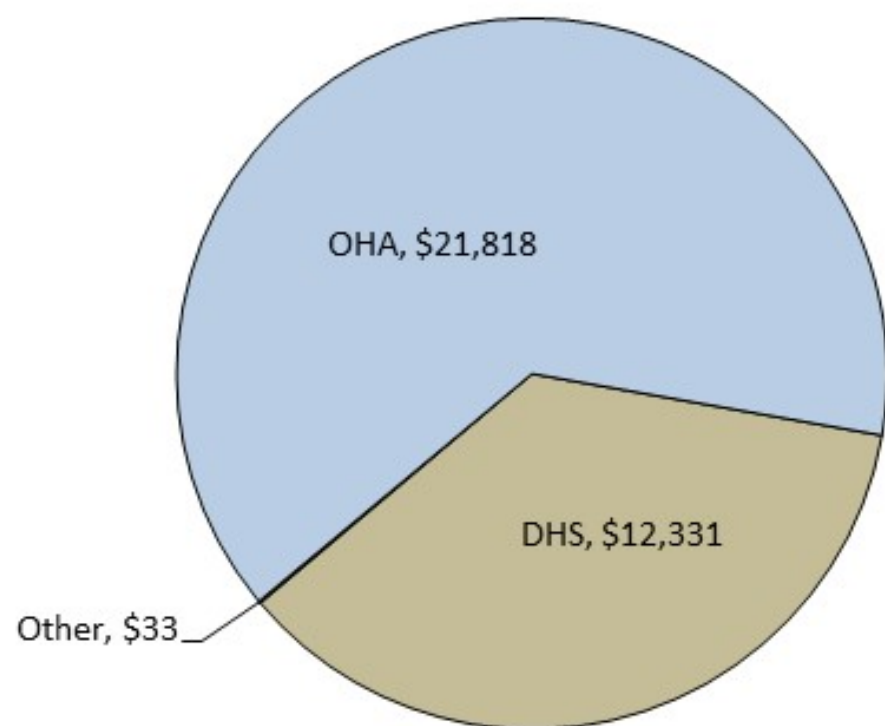
**Human Services Program Area**  
**2019-21 Current Service Level - Total Funds**  
**\$34,183 Million**



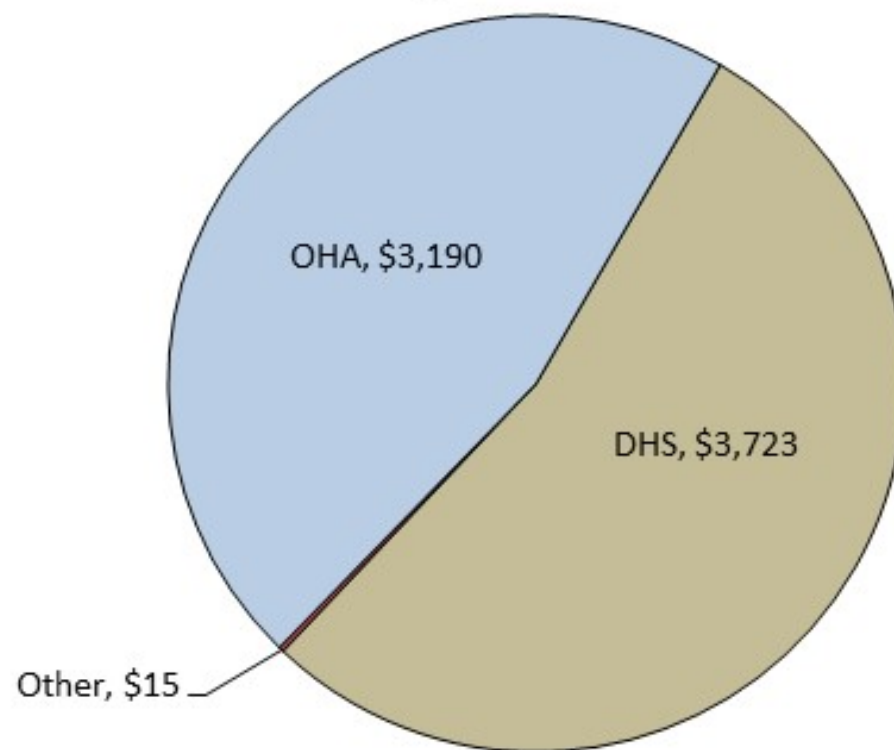
**Human Services Program Area**  
**2019-21 Current Service Level - Total Funds**  
**\$34,183 Million**



**Human Services Program Area**  
**2019-21 Current Service Level - Total Funds**  
**\$34,183 Million**

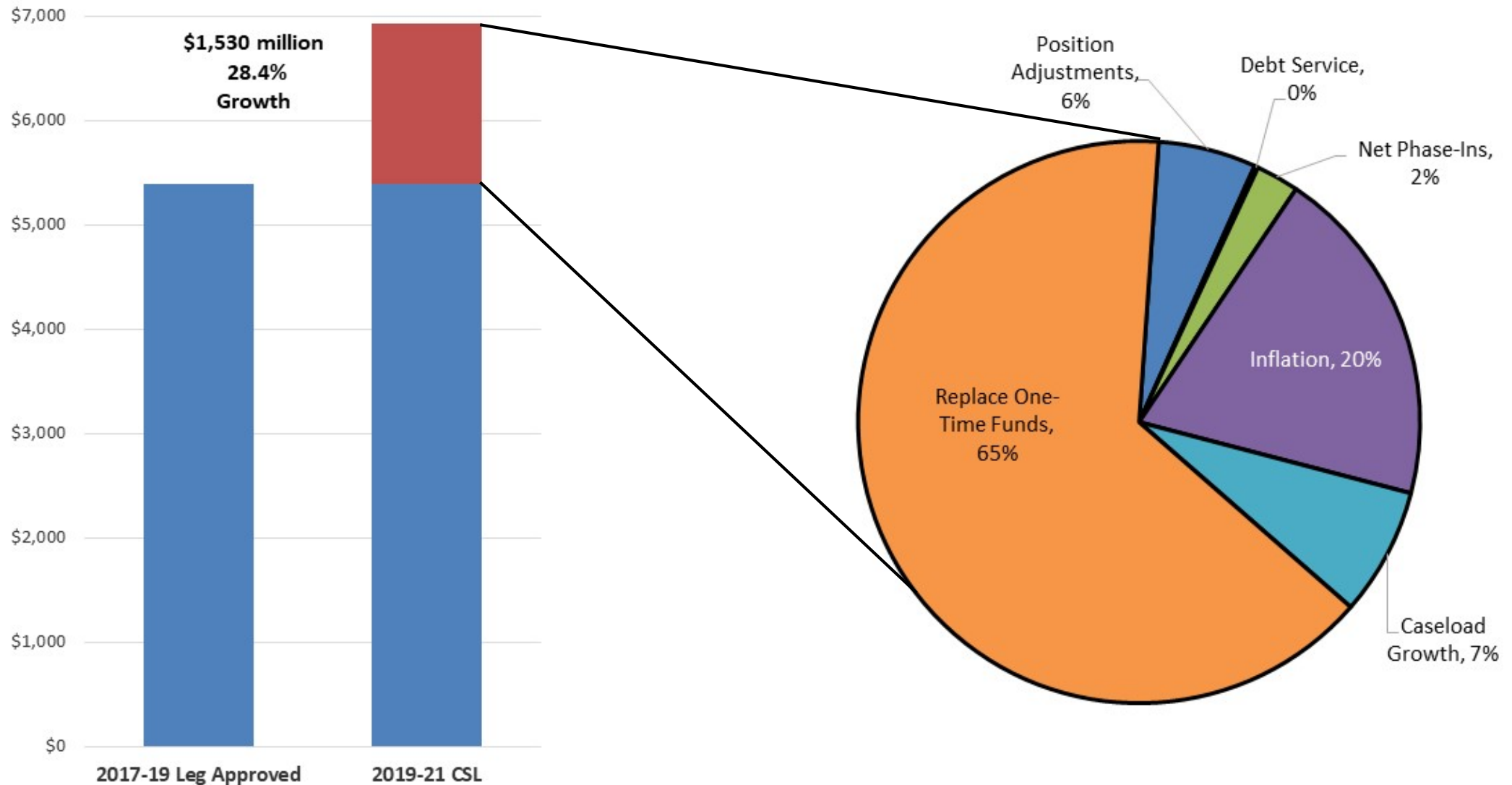


**Human Services Program Area**  
**2019-21 Current Service Level - GF/LF -**  
**\$6,928 Million**



# 2019-21 Human Services Program Area

Current Service Level Budget Growth – GF/LF (Dollars in Millions)



Appropriation Bill  
Example

Enrolled  
**House Bill 5021**

Introduced and printed pursuant to House Rule 12.00. Pre-session filed (at the request of Oregon Department of Administrative Services)

CHAPTER .....

AN ACT

Relating to the financial administration of the Long Term Care Ombudsman; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

**SECTION 1.** There are appropriated to the Long Term Care Ombudsman, for the biennium beginning July 1, 2017, out of the General Fund, the following amounts for the following purposes:

- (1) General program and services provided to care facility residents ..... \$ 4,807,617
- (2) Public guardian and conservator program ..... \$ 1,552,515

**SECTION 2.** Notwithstanding any other law limiting expenditures, the amount of \$896,835 is established for the biennium beginning July 1, 2017, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, and including federal Older Americans Act funds received from the Department of Human Services, but excluding lottery funds and federal funds not described in this section, collected or received by the Long Term Care Ombudsman.

**SECTION 3.** (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Emergency Board, for the biennium beginning July 1, 2017, out of the General Fund, the amount of \$200,000, to be allocated to the Long Term Care Ombudsman for costs associated with the public guardian and conservator program.

(2) If any of the moneys appropriated by subsection (1) of this section are not allocated by the Emergency Board prior to December 1, 2018, the moneys remaining on that date become available for any purpose for which the Emergency Board lawfully may allocate funds.

**SECTION 4.** This 2017 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2017 Act takes effect July 1, 2017.



## Work Session Memo Example

**To:** Human Services Subcommittee

**From:** Laurie Byerly, Legislative Fiscal Office

**Date:** June 12, 2017

**Subject:** HB 5021 – Long Term Care Ombudsman  
Work Session Recommendations

### Long Term Care Ombudsman – Agency Totals

	2013-15 Actual	2015-17 Legislatively Approved	2017-19 Current Service Level	2017-19 LFO Recommended
General Fund	2,510,888	6,306,755	6,960,132	6,360,132
Other Funds	670,166	737,916	779,795	896,835
<b>Total Funds</b>	<b>\$3,181,054</b>	<b>\$7,044,671</b>	<b>\$7,739,927</b>	<b>\$7,256,967</b>
Positions	24	25	25	25
FTE	16.81	24.50	24.50	24.50

Attached are the recommendations for the Legislative Fiscal Office for the Long Term Care Ombudsman. The total funds budget is a \$212,296 or 3.0% increase from the 2015-17 legislatively approved budget and a \$482,960 or 6.2% decrease from the 2017-19 current service level.

The recommendations include the following:

- A package adding \$117,040 Other Funds expenditure limitation to allow the Residential Facilities Ombudsman program to spend civil penalty revenues.
- A package reducing the Oregon Public Guardian and Conservator program by \$600,000. A related budget note and \$200,000 special purpose appropriation to the Emergency Board provides an opportunity for the legislature to review the program and potentially restore some funding during the interim.

### Adjustments to Current Service Level

See attached "Work Session Presentation Report."

# Work Session Presentation Report Example

## Long Term Care Ombudsman

## LFO Analyst Recommended

Agency Number: 11400

LFO102 - Work Session Presentation Report  
2017-19 Biennium

Version: L - 01 - LFO Analyst Recommended

Cross Reference: 11400-000-00-00-00000

Long Term Care Ombudsman

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2015-17 Agy. Leg. Adopted	6,172,203	-	719,522	-	-	-	6,891,725	25	24.50
2015-17 Ebds, SS & Admin Act	134,552	-	18,394	-	-	-	152,946	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2015-17 Leg Approved Budget	6,306,755	-	737,916	-	-	-	7,044,671	25	24.50
2015-17 Leg Approved Budget (Base)	6,303,638	-	737,480	-	-	-	7,041,118	25	24.50
Summary of Base Adjustments	487,299	-	38,235	-	-	-	525,534	-	-
2017-19 Base Budget	6,790,937	-	775,715	-	-	-	7,566,652	25	24.50
010: Non-PICS Pers Svc/Vacancy Factor	35,900	-	1,120	-	-	-	37,020	-	-
020: Phase In / Out Pgm & One-time Cost	(100,000)	-	-	-	-	-	(100,000)	-	-
030: Inflation & Price List Adjustments	233,295	-	2,960	-	-	-	236,255	-	-
2017-19 Current Service Level	6,960,132	-	779,795	-	-	-	7,739,927	25	24.50
Adjusted 2017-19 Current Service Level	6,960,132	-	779,795	-	-	-	7,739,927	25	24.50
Total LFO Recommended Packages	(600,000)	-	117,040	-	-	-	(482,960)	-	-
2017-19 Legislative Actions	6,360,132	-	896,835	-	-	-	7,256,967	25	24.50
Net change from 2015-17 Leg Approved Budget	53,377	-	158,919	-	-	-	212,296	-	-
Percent change from 2015-17 Leg Approved Budget	0.9%	0.0%	21.5%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%
Net change from 2017-19 Adj Current Service Level	(600,000)	-	117,040	-	-	-	(482,960)	-	-
Percent change from 2017-19 Adj Current Service Level	(8.6%)	0.0%	15.0%	0.0%	0.0%	0.0%	(6.2%)	0.0%	0.0%

## Budget Report Narrative Example

### Summary of Human Services Subcommittee Action

The LTCO's mission is to protect individual's rights, enhance quality of life, improve care and promote dignity for residents living in Oregon's licensed long-term care facilities. LTCO is comprised of the following three programs: (1) Long Term Care Ombudsman; (2) Residential Facilities Ombudsman (RFO); and (3) the Oregon Public Guardian Program (OPG). The agency has a staff of 24.50 full-time equivalent positions for three programs.

The LTCO program coordinates a network of trained and certified volunteer ombudsmen who regularly visit long-term care residents and monitor the facilities in which they reside. As the volunteers receive complaints, they investigate and work to resolve them within the facility or, in the case of abuse, they refer the complaint to local adult protective services offices for investigation. LTCO professional staff provides technical support and training for these volunteers. They also monitor facilities and respond to complex resident problems. In addition, LTCO provides guardian and conservator services for persons without relatives or friends willing or able to serve as guardians and conservators and are lacking the financial resources to obtain a private guardian or conservator.

The RFO program (added to the agency through Senate Bill 626 in 2013) advocates for persons with intellectual/developmental disabilities (I/DD) and/or a mental health (MH) diagnosis living in licensed or certified facilities. The OPG program (added to the agency through Senate Bill 1553 in 2014) allows the state to serve as a statewide court-appointed guardian and/or conservator, trustee and payee for incapacitated Oregonians who have no other resources to serve in such capacity.

The Human Services Subcommittee approved a budget of \$7,256,967 total funds, consisting of \$6,360,132 General Fund, \$896,835 Other Funds expenditure limitation and 25 positions (24.50 FTE). The total funds approved budget is three percent above the 2015-17 legislatively approved budget.

#### Long Term Care Ombudsman

The Subcommittee approved Package 101, RFO Quality Care Fund Exception. This package increases Other Funds limitation by \$117,040. The revenue is derived through civil penalties and fines assessed against residential facilities serving individuals with intellectual/developmental disabilities and/or a diagnosed mental health condition. The limitation provides the RFO program with resources necessary to continue developing the program for full implementation, including volunteer recruitment activities, training, and ongoing support.

#### Oregon Public Guardian and Conservator Program

The Subcommittee approved Package 801, LFO Analyst Adjustments. This package removes \$600,000 General Fund from the budget. This action is due to both statewide General Fund constraints and legislative concerns about program sustainability. While the Oregon Public Guardian and Conservator program was approved in Senate Bill 1553 (2014) and effective July 1, 2014, the program got off to a slow start because it took several months to find and hire the program lead. This has led to caseloads being lower than anticipated and a delay in establishing contracts to help deliver services. In addition, legal expenses and the amount of time spent on diversion activities have been higher than expected. More recently the program head resigned, which again leaves a leadership void. Even at the reduced level, the budget retains all program staff,



# Budget Report Spreadsheet Example

## DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

Long Term Care Ombudsman  
Tamara Brickman -- 503-378-4709

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
2015-17 Legislatively Approved Budget at Dec 2016 *	\$ 6,306,755	\$ -	\$ 737,916	\$ -	\$ -	\$ -	7,044,671	25	24.50
2017-19 Current Service Level (CSL)*	\$ 6,960,132	\$ -	\$ 779,795	\$ -	\$ -	\$ -	7,739,927	25	24.50
<u>SUBCOMMITTEE ADJUSTMENTS (from CSL)</u>									
<b>SCR 010 - Long Term Care Ombudsman</b>									
Package 101: RFO Quality Care Fund Exception									
Services and Supplies	\$ -	\$ -	\$ 117,040	\$ -	\$ -	\$ -	117,040		
<b>SCR 020 - Public Guardian and Conservator Program</b>									
Package 801: LFO analyst Adjustments									
Services and Supplies	\$ (758,000)	\$ -	\$ -	\$ -	\$ -	\$ -	(758,000)		
Special Payments	\$ 158,000	\$ -	\$ -	\$ -	\$ -	\$ -	158,000		
TOTAL ADJUSTMENTS	\$ (600,000)	\$ -	\$ 117,040	\$ -	\$ -	\$ -	(482,960)	0	0.00
SUBCOMMITTEE RECOMMENDATION *	\$ 6,360,132	\$ -	\$ 896,835	\$ -	\$ -	\$ -	7,256,967	25	24.50
% Change from 2015-17 Leg Approved Budget	0.9%	0.0%	21.5%	0.0%	0.0%	0.0%	3.0%		
% Change from 2017-19 Current Service Level	(8.6%)	0.0%	15.0%	0.0%	0.0%	0.0%	(6.2%)		

\*Excludes Capital Construction Expenditures

### EMERGENCY BOARD

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS
			LIMITED	NONLIMITED	LIMITED	NONLIMITED	
Special Purpose Appropriation for Public Guardian and Conservator Program	\$ 200,000	\$ -	\$ -	\$ -	\$ -	\$ -	200,000

## Approved KPMs Report Example

# Legislatively Approved 2017 - 2019 Key Performance Measures

Published: 6/14/2017 2:38:24 PM

**Agency:** Long Term Care Ombudsman, Office of

**Mission Statement:**

To Enhance The Quality Of Life, Improve The Level Of Care, Protect The Rights Of The Individual And Promote The Dignity Of Each Oregon Citizen Living In A Nursing Facility, Residential Care Facility, Assisted Living Facility Or Adult Foster Care Home.

Legislatively Approved KPMs	Metrics	Agency Request	Last Reported Result	Target 2018	Target 2019
1. Percentage of non-referred complaints where action is needed that are partially or fully resolved.		Approved	91%	98%	98%
2. Average initial response time to non-referred cases.		Approved	2.14	1.50	1.50
3. Average time to close non-referred cases.		Approved	28	25	25
4. Percentage of nursing facilities visited at least once annually.		Approved	95%	100%	100%
5. Percentage of assisted living and residential care facilities visited at least once annually.		Approved	87%	98%	98%
6. Percentage of adult foster care homes visited at least once annually.		Approved	72%	80%	80%
7. Number of requests for assistance from consumers, the public, facility staff and agencies.		Approved	6,340	6,000	6,000
8. Participation in system-wide advocacy meetings at the local, regional, state and national levels.		Approved	310	800	800
9. Total number of certified ombudsmen volunteer hours annually.		Approved	28,431	28,000	28,000
10. Customer Service - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information.	Accuracy	Approved	76%	90%	90%
	Helpfulness		88%	90%	90%
	Expertise		87%	90%	90%
	Overall		85%	90%	90%
	Timeliness		86%	90%	90%
	Availability of Information		83%	90%	90%

**LFO Recommendation:**

Approve the KPMs as proposed. Approve the targets for 2018 and 2019 as shown. For KPMs 7 and 8, direct the agency to review data and seek out a more precise or meaningful metric to help identify trends, focus agency efforts, and potentially revise targets. In conjunction with the assessment required under the budget note and legislative feedback on that work, develop at least two proposed key performance measures for the Oregon Public Guardian and Conservator program for the 2019-21 biennium.

**SubCommittee Action:**

Approved the LFO Recommendation.