

**Legislative
Fiscal Office**

Oregon State Capitol
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**Joint Committee on
Ways and Means**

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Sen. Jackie Winters, Senate Co-Vice Chair
Rep. Dan Rayfield, House Co-Vice Chair
Rep. Greg Smith, House Co-Vice Chair

To: Human Services Subcommittee
From: Kim To, Legislative Fiscal Office
Date: May 21, 2018
Subject: SB 5503 – Oregon Commission for the Blind
Work Session Recommendations

Oregon Commission for the Blind (OCB) – Agency Totals

	2015-17 Actual	2017-19 Legislatively Approved	2019-21 Current Service Level	2019-21 LFO Recommended
General Fund	3,690,478	3,535,937	4,331,786	6,737,136
Other Funds	1,035,705	1,482,049	1,567,683	1,567,683
Federal Funds	14,088,099	16,645,593	16,071,581	16,071,581
Total Funds	\$18,814,282	\$21,663,579	\$21,971,050	\$24,376,400
Positions	56	68	67	68
FTE	52.21	62.53	65.00	66.00

The 2019-21 LFO recommended budget for the Oregon Commission for the Blind is 68 positions (66.00 FTE), and \$24,376,400 Total Funds. This is a 12.5% increase from 2017-19 Legislatively Approved Budget. The attached recommendations from the Legislative Fiscal Office for the Oregon Commission for the Blind contains the following:

Adjustments to Current Service Level

See attached “Work Session Presentation Report” dated May 2, 2019.

Note: Statewide adjustments are not included in these recommendations. Any needed adjustments will be made in end of session bills.

- Package 101 - Vocational Rehabilitation Case Management Modernization Project. This package approves a one-time appropriation of \$2,405,350 General Fund and the establishment of 1 position (1.00 FTE) to support the migration of the agency’s case management system to a new vendor because the current provider is planning to exit the market after December 31, 2020. In planning this project, the

Commission has been working closely with LFO and the Office of the State Chief Information Office (OSCIO) and has received Stage Gate 1 endorsement (July 2018) and State Gate 2 endorsement (January 219).

Accept LFO Recommendation:

MOTION: I move the LFO recommendation to SB 5503. (VOTE)

OR

Change LFO Recommendation:

MOTION: I move the LFO recommendation to SB 5503, with modifications. (VOTE)

Budget Notes

Budget Note: Vocational Rehabilitation Case Management Modernization Project

The Oregon Commission for the Blind has initiated a project to replace an aging vocational rehabilitation case management system used to record required data on all clients receiving services as well as to track all services provided. The system is mission critical to OCB operations because it is used to satisfy federal reporting requirements and must be replaced as the current system software vendor has notified OCB that it will discontinue software maintenance and support as of December 31, 2020. Because the project is in the planning phase of its lifecycle, the Legislative Fiscal Office (LFO) recommends that OCB be directed to:

- Continue to work closely with and regularly report project status to the Office of the State Chief Information Office (OSCIO) and the LFO throughout the lifecycle of the project.
- Follow the Joint State CIO/LFO Stage Gate Review Process.
- Obtain and retain qualified project management and business analyst services with experience in planning and managing projects of this type, scope and magnitude.
- Update the Business Case and foundational project management documents as required.
- Work with OSCIO to acquire Independent Quality Management Services as required to:
 - Conduct an initial and ongoing risk assessment(s).
 - Perform quality control (QC) reviews on the Business Case, solution vendor procurement documents, and foundational project management documents as appropriate.
 - Perform ongoing, independent quality management services as directed by OSCIO.
- Submit the updated Business Case, procurement and project management documents, initial risk assessment, and QC reviews to OSCIO and LFO for Stage Gate Review.
- Report back to the Legislature on project status during the 2020 Annual Legislative Session and/or to interim Legislative committees as required.

- Utilize the Office of the State CIO's Enterprise Project and Portfolio Management system for all project review, approval, and project status and closeout reporting activities throughout the life of the project.

Accept LFO Recommendation:

MOTION: I move the LFO recommendation on Budget Notes. (VOTE)

OR

Change LFO Recommendation (any changes must be approved by the co-chairs):

MOTION: I move the LFO recommendation on Budget Notes, with modifications. (VOTE)

Performance Measures

See attached "Legislatively Proposed 2019-21 Key Performance Measures."

Accept LFO Recommendation:

MOTION: I move the LFO recommendation on Key Performance Measures. (VOTE)

OR

Change LFO Recommendation:

MOTION: I move the LFO recommendation on Key Performance Measures, with modifications. (VOTE)

Recommended Changes

LFO recommends amending SB 5503 by the following changes as reflected in the -1 amendment:

Section 1, Line 6	Delete {\$6,598,039} and insert "\$6,737,136".
Section 2, Line 9	Delete {\$1,557,852} and insert "\$1,567,683".
Section 3, Line 14	Delete {\$15,994,599} and insert "\$16,071,581".

MOTION: I move adoption of the -1 amendment to SB 5503. (VOTE)

Final Subcommittee Action

LFO recommends that SB 5503, as amended by the -1 amendment, to be moved to the Ways and Means Full Committee.

MOTION: I move SB 5503, as amended, to the Full Committee with a do pass recommendation. (VOTE)

Carriers

Full Committee: _____

House Floor: _____

Senate Floor: _____

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2017-19 Agy. Leg. Adopted	3,426,922	-	1,475,033	16,372,609	-	-	21,274,564	68	62.53
2017-19 Ebds, SS & Admin Act	109,015	-	7,016	272,984	-	-	389,015	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2017-19 Leg Approved Budget	3,535,937	-	1,482,049	16,645,593	-	-	21,663,579	68	62.53
2017-19 Leg Approved Budget (Base)	3,535,937	-	1,482,049	16,645,593	-	-	21,663,579	68	62.53
Summary of Base Adjustments	510,793	-	5,816	505,246	-	-	1,021,855	(1)	2.47
2019-21 Base Budget	4,046,730	-	1,487,865	17,150,839	-	-	22,685,434	67	65.00
010: Non-PICS Pers Svc/Vacancy Factor	75,405	-	(29)	181,719	-	-	257,095	-	-
020: Phase In / Out Pgm & One-time Cost	(131,414)	-	-	(1,451,183)	-	-	(1,582,597)	-	-
030: Inflation & Price List Adjustments	341,065	-	41,678	228,375	-	-	611,118	-	-
050: Fundshifts and Revenue Reductions	-	-	38,169	(38,169)	-	-	-	-	-
2019-21 Current Service Level	4,331,786	-	1,567,683	16,071,581	-	-	21,971,050	67	65.00
Adjusted 2019-21 Current Service Level	4,331,786	-	1,567,683	16,071,581	-	-	21,971,050	67	65.00
Total LFO Recommended Packages	2,405,350	-	-	-	-	-	2,405,350	1	1.00
2019-21 Legislative Actions	6,737,136	-	1,567,683	16,071,581	-	-	24,376,400	68	66.00
Net change from 2017-19 Leg Approved Budget	3,201,199	-	85,634	(574,012)	-	-	2,712,821	-	3.47
Percent change from 2017-19 Leg Approved Budget	90.5%	0.0%	5.8%	(3.5%)	0.0%	0.0%	12.5%	0.0%	5.6%
Net change from 2019-21 Adj Current Service Level	2,405,350	-	-	-	-	-	2,405,350	1	1.00
Percent change from 2019-21 Adj Current Service Level	55.5%	0.0%	0.0%	0.0%	0.0%	0.0%	11.0%	1.5%	1.5%

Administrative Services

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2017-19 Agy. Leg. Adopted	1,100,823	-	15,552	2,667,462	-	-	3,783,837	17	15.21
2017-19 Ebds, SS & Admin Act	35,420	-	-	70,211	-	-	105,631	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2017-19 Leg Approved Budget	1,136,243	-	15,552	2,737,673	-	-	3,889,468	17	15.21
2017-19 Leg Approved Budget (Base)	1,136,243	-	15,552	2,737,673	-	-	3,889,468	17	15.21
Summary of Base Adjustments	155,907	-	-	319,034	-	-	474,941	-	1.79
2019-21 Base Budget	1,292,150	-	15,552	3,056,707	-	-	4,364,409	17	17.00
010: Non-PICS Pers Svc/Vacancy Factor	7,532	-	39	27,504	-	-	35,075	-	-
020: Phase In / Out Pgm & One-time Cost	(138,986)	-	-	(362,986)	-	-	(501,972)	-	-
030: Inflation & Price List Adjustments	91,172	-	543	23,290	-	-	115,005	-	-
2019-21 Current Service Level	1,251,868	-	16,134	2,744,515	-	-	4,012,517	17	17.00
Adjusted 2019-21 Current Service Level	1,251,868	-	16,134	2,744,515	-	-	4,012,517	17	17.00
Total LFO Recommended Packages	-	-	-	-	-	-	-	-	-
2019-21 Legislative Actions	1,251,868	-	16,134	2,744,515	-	-	4,012,517	17	17.00
Net change from 2017-19 Leg Approved Budget	115,625	-	582	6,842	-	-	123,049	-	1.79
Percent change from 2017-19 Leg Approved Budget	10.2%	0.0%	3.7%	0.3%	0.0%	0.0%	3.2%	0.0%	11.8%
Net change from 2019-21 Adj Current Service Level	-	-	-	-	-	-	-	-	-
Percent change from 2019-21 Adj Current Service Level	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2017-19 Agy. Leg. Adopted	928,390	-	1,030,270	7,572,468	-	-	9,531,128	22	22.22
2017-19 Ebds, SS & Admin Act	32,447	-	2,180	127,521	-	-	162,148	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2017-19 Leg Approved Budget	960,837	-	1,032,450	7,699,989	-	-	9,693,276	22	22.22
2017-19 Leg Approved Budget (Base)	960,837	-	1,032,450	7,699,989	-	-	9,693,276	22	22.22
Summary of Base Adjustments	232,147	-	(1,300)	863,317	-	-	1,094,164	3	4.03
2019-21 Base Budget	1,192,984	-	1,031,150	8,563,306	-	-	10,787,440	25	26.25
010: Non-PICS Pers Svc/Vacancy Factor	24,944	-	40	82,755	-	-	107,739	-	-
020: Phase In / Out Pgm & One-time Cost	7,572	-	-	27,916	-	-	35,488	-	-
030: Inflation & Price List Adjustments	115,186	-	37,054	163,991	-	-	316,231	-	-
2019-21 Current Service Level	1,340,686	-	1,068,244	8,837,968	-	-	11,246,898	25	26.25
Adjusted 2019-21 Current Service Level	1,340,686	-	1,068,244	8,837,968	-	-	11,246,898	25	26.25
Total LFO Recommended Packages	2,405,350	-	-	-	-	-	2,405,350	1	1.00
2019-21 Legislative Actions	3,746,036	-	1,068,244	8,837,968	-	-	13,652,248	26	27.25
Net change from 2017-19 Leg Approved Budget	2,785,199	-	35,794	1,137,979	-	-	3,958,972	4	5.03
Percent change from 2017-19 Leg Approved Budget	289.9%	0.0%	3.5%	14.8%	0.0%	0.0%	40.8%	18.2%	22.6%
Net change from 2019-21 Adj Current Service Level	2,405,350	-	-	-	-	-	2,405,350	1	1.00
Percent change from 2019-21 Adj Current Service Level	179.4%	0.0%	0.0%	0.0%	0.0%	0.0%	21.4%	4.0%	3.8%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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Package 101 Information Tech/Case Management Modernization

Package Description Approve a one-time appropriation of \$2,405,350 General Fund and establishment of one limited duration position (1.00 FTE) to support the migration of the agency's Case Management System to a new vendor because the current vendor is planning to exit the market after December 31, 2020.

LFO Recommendation

LFO Recommended	2,405,350	-	-	-	-	-	2,405,350	1	1.00
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	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2017-19 Agy. Leg. Adopted	119,549	-	428,147	2,498,572	-	-	3,046,268	5	5.00
2017-19 Ebds, SS & Admin Act	2,385	-	4,836	16,886	-	-	24,107	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2017-19 Leg Approved Budget	121,934	-	432,983	2,515,458	-	-	3,070,375	5	5.00
2017-19 Leg Approved Budget (Base)	121,934	-	432,983	2,515,458	-	-	3,070,375	5	5.00
Summary of Base Adjustments	147,838	-	7,119	(105,579)	-	-	49,378	-	-
2019-21 Base Budget	269,772	-	440,102	2,409,879	-	-	3,119,753	5	5.00
010: Non-PICS Pers Svc/Vacancy Factor	14,534	-	(146)	9,630	-	-	24,018	-	-
020: Phase In / Out Pgm & One-time Cost	-	-	-	(1,116,113)	-	-	(1,116,113)	-	-
030: Inflation & Price List Adjustments	25,449	-	3,032	9,002	-	-	37,483	-	-
2019-21 Current Service Level	309,755	-	442,988	1,312,398	-	-	2,065,141	5	5.00
Adjusted 2019-21 Current Service Level	309,755	-	442,988	1,312,398	-	-	2,065,141	5	5.00
Total LFO Recommended Packages	-	-	-	-	-	-	-	-	-
2019-21 Legislative Actions	309,755	-	442,988	1,312,398	-	-	2,065,141	5	5.00
Net change from 2017-19 Leg Approved Budget	187,821	-	10,005	(1,203,060)	-	-	(1,005,234)	-	-
Percent change from 2017-19 Leg Approved Budget	154.0%	0.0%	2.3%	(47.8%)	0.0%	0.0%	(32.7%)	0.0%	0.0%
Net change from 2019-21 Adj Current Service Level	-	-	-	-	-	-	-	-	-
Percent change from 2019-21 Adj Current Service Level	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2017-19 Agy. Leg. Adopted	675,826	-	1,064	2,506,495	-	-	3,183,385	14	12.60
2017-19 Ebds, SS & Admin Act	17,148	-	-	57,056	-	-	74,204	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2017-19 Leg Approved Budget	692,974	-	1,064	2,563,551	-	-	3,257,589	14	12.60
2017-19 Leg Approved Budget (Base)	692,974	-	1,064	2,563,551	-	-	3,257,589	14	12.60
Summary of Base Adjustments	(146,315)	-	(3)	(480,281)	-	-	(626,599)	(4)	(3.60)
2019-21 Base Budget	546,659	-	1,061	2,083,270	-	-	2,630,990	10	9.00
010: Non-PICS Pers Svc/Vacancy Factor	12,958	-	38	30,969	-	-	43,965	-	-
030: Inflation & Price List Adjustments	69,844	-	1,049	23,282	-	-	94,175	-	-
2019-21 Current Service Level	629,461	-	2,148	2,137,521	-	-	2,769,130	10	9.00
Adjusted 2019-21 Current Service Level	629,461	-	2,148	2,137,521	-	-	2,769,130	10	9.00
Total LFO Recommended Packages	-	-	-	-	-	-	-	-	-
2019-21 Legislative Actions	629,461	-	2,148	2,137,521	-	-	2,769,130	10	9.00
Net change from 2017-19 Leg Approved Budget	(63,513)	-	1,084	(426,030)	-	-	(488,459)	(4)	(3.60)
Percent change from 2017-19 Leg Approved Budget	(9.2%)	0.0%	101.9%	(16.6%)	0.0%	0.0%	(15.0%)	(28.6%)	(28.6%)
Net change from 2019-21 Adj Current Service Level	-	-	-	-	-	-	-	-	-
Percent change from 2019-21 Adj Current Service Level	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2017-19 Agy. Leg. Adopted	602,334	-	-	1,127,612	-	-	1,729,946	10	7.50
2017-19 Ebds, SS & Admin Act	21,615	-	-	1,310	-	-	22,925	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2017-19 Leg Approved Budget	623,949	-	-	1,128,922	-	-	1,752,871	10	7.50
2017-19 Leg Approved Budget (Base)	623,949	-	-	1,128,922	-	-	1,752,871	10	7.50
Summary of Base Adjustments	121,216	-	-	(91,245)	-	-	29,971	-	0.25
2019-21 Base Budget	745,165	-	-	1,037,677	-	-	1,782,842	10	7.75
010: Non-PICS Pers Svc/Vacancy Factor	15,437	-	-	30,861	-	-	46,298	-	-
030: Inflation & Price List Adjustments	39,414	-	-	8,810	-	-	48,224	-	-
050: Fundshifts and Revenue Reductions	-	-	38,169	(38,169)	-	-	-	-	-
2019-21 Current Service Level	800,016	-	38,169	1,039,179	-	-	1,877,364	10	7.75
Adjusted 2019-21 Current Service Level	800,016	-	38,169	1,039,179	-	-	1,877,364	10	7.75
Total LFO Recommended Packages	-	-	-	-	-	-	-	-	-
2019-21 Legislative Actions	800,016	-	38,169	1,039,179	-	-	1,877,364	10	7.75
Net change from 2017-19 Leg Approved Budget	176,067	-	38,169	(89,743)	-	-	124,493	-	0.25
Percent change from 2017-19 Leg Approved Budget	28.2%	0.0%	100.0%	(8.0%)	0.0%	0.0%	7.1%	0.0%	3.3%
Net change from 2019-21 Adj Current Service Level	-	-	-	-	-	-	-	-	-
Percent change from 2019-21 Adj Current Service Level	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

SB 5503-1
(LC 9503)
5/3/19 (DFY/ps)

Requested by JOINT COMMITTEE ON WAYS AND MEANS

**PROPOSED AMENDMENTS TO
SENATE BILL 5503**

- 1 In line 6 of the printed bill, delete "\$6,598,039" and insert "\$6,737,136".
- 2 In line 9, delete "\$1,557,852" and insert "\$1,567,683".
- 3 In line 14, delete "\$15,994,599" and insert "\$16,071,581".

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Legislatively Proposed 2019 - 2021 Key Performance Measures

Published: 5/2/2019 12:05:18 PM

Agency: Blind Commission

Mission Statement:

To empower Oregonians who are blind to fully engage in life.

Legislatively Proposed KPMs	Metrics	Agency Request	Last Reported Result	Target 2020	Target 2021
1. EMPLOYMENT - Percentage of Vocational Rehabilitation participants who are employed in unsubsidized, competitive, integrated settings the second quarter after exiting the program.		Approved	No Data	TBD	TBD
2. INDEPENDENT LIVING - Percentage of eligible individuals closed successfully and unsuccessfully in the Older Blind Independent Living Program who reported feeling that they are in greater control and are more confident in their ability to maintain their current living situation as a result of services received.		Approved	93	93	93
3. CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Expertise	Approved	92.30	96.50	96.50
	Availability of Information		86.50	96.50	96.50
	Helpfulness		94.20	96.50	96.50
	Accuracy		86.50	96.50	96.50
	Overall		88.50	96.50	96.50
	Timeliness		78.80	96.50	96.50
4. BEST PRACTICES - Percent of total best practices met by the Commission.		Approved	96.20%	100%	100%

LFO Recommendation:

LFO recommends approval of measures and targets as presented.

SubCommittee Action: