

**State of Oregon
Legislative Fiscal Office**

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To: Agency Directors and Budget Officers

From: Laurie Byerly, Interim Legislative Fiscal Officer

Subject: Additional Instructions for Presentations to Ways and Means Subcommittees

In December, you received instructions regarding information that needs to be prepared for Subcommittees of the Joint Committee on Ways and Means for the 2021 session. We noted then that we would send additional information regarding Subcommittee presentations; that information is provided below. After further discussion with the Co-Chairs of the Joint Committee on Ways and Means and considering that there will be fewer Subcommittee meetings, agency presentations need to be as focused as possible.

In addition, agencies are encouraged to meet with Subcommittee members in advance of Subcommittee hearings if possible.

Ways and Means PowerPoint Presentation

Following are the items that should compose an agency's PowerPoint and oral presentation:

- A high-level summary of programs, services, and organizational structure
- Any significant, outstanding issues that still need to be resolved for 2019-21 (if you are showing 2019-21 budget values on presentation slides, please use 2019-21 legislatively approved through the January 2021 meeting of the Emergency Board)
- Major agency changes, budget drivers, budget risks, and information technology projects affecting the 2021-23 budget (including caseload, fees, revenue changes, cost per case, policy option packages, etc.)
- Budget issues related to the 2020 COVID-19 and/or wildfire emergencies
- Agency-proposed legislation affecting an agency's budget
- 10% Reduction options and impact of any reductions included in the Governor's Budget
- Additional actions that can be taken to contain and/or reduce costs without affecting programs/services
- Requested Key Performance Measure (KPM) changes or any KPM that the agency is not achieving

Agency PowerPoint presentations, written reference materials, and list of agency presenters are due to your Legislative Fiscal Office (LFO) analyst 10 days prior to your Subcommittee hearing. (Please send both .ppt and .pdf versions of the presentation document; for the written reference materials please provide a single .pdf containing all requested components. The .pdf files should not exceed 20MB in size.)

For those agencies scheduled in the first two weeks of session, please contact your LFO analyst to discuss an adjusted deadline. If an agency believes they need an adjustment to a deadline or to the information to be provided in either the PowerPoint presentation or the additional written reference materials, you must contact your LFO analyst. In addition, LFO analysts will be sending a form to agency budget contacts that is to be used by agencies to provide contact information for staff that will participate in the agency budget presentation/meetings.

Agencies are still expected to prepare written materials as noted in the earlier memo from our office regarding presentations and also listed below. These written reference materials will be made available to all Subcommittee members for their use in learning about agencies and being prepared for Subcommittee discussions. A hyperlink/URL to the agency's Governor's Budget published on its website should also be included in the written reference materials. If the agency's Governor's Budget document is not completed prior to the deadline for submitting materials, the link/URL should be provided to your LFO analyst as soon as available.

Given the unique issues facing us this session, it is more important than ever to follow the instructions regarding presentations and materials. Again, if your agency believes an adjustment in content or deadline is needed, contact your LFO analyst.

Ways and Means Written Reference Materials

The agency written reference materials should include the following information in the order listed (large agencies should prepare the content for the entire agency and for each major division/program area; small agencies may cover the entire agency at the summary level):

- Agency mission, goals, and historical perspective; how the requested budget will achieve desired program results;
- Overview of agency performance and outcome measures, how measures are used by the agency, and progress toward achieving performance goals;
- Summary of programs, including who is served and how many people are served;
- Agency organizational information, including an organizational chart and description of how services are delivered;
- Major budget drivers, budget risks (including pending lawsuits, disputes over existing contracts, audit findings), and environmental factors (for large agencies, specific detail should be provided in the program discussion);
- Major changes to the agency in the past 6 years, broken down by biennia, including program changes (additions or reductions) and the effect of changes on service and program delivery, with an emphasis on programs that were initiated in 2019-21;
- Specific actions the agency has taken or plans to take to contain costs and improve programs and service, including realigning/consolidating programs; eliminating or

reducing duplication of services or unnecessary processes; and/or proposed statutory, rule, or process changes (supporting data, including estimated savings, should be included);

- Major budget information, including caseloads, fees, construction, unique cost increases/decreases, summary of revenues, proposed changes in revenue sources or fees, and historical and projected spending for programs;
- Description of programs that are shared with or dependent on other agencies, including both existing programs and new initiatives that require cooperation between affected agencies for effective implementation;
- Summary of proposed legislation affecting agency operations, the status of the legislation, and the budgetary impact;
- Discussion of program or service reductions included in the Governor's budget, 10% reduction options requested by LFO, and information on vacant positions;
- Discussion of pandemic/Coronavirus Relief Fund issues and effect of 2019-21 actions on the 2021-23 budget;
- A hyperlink/URL to the agency's Governor's Budget published on its website should also be included in the written reference materials. If the agency's Governor's Budget document is not completed prior to the deadline for submitting materials, the link/URL should be provided to your LFO analyst as soon as available.
- Provide the following (if applicable):
 - Results of, and agency responses to, all audits on the agency conducted by the Secretary of State under ORS 297.070 during the current biennium;
 - Description of how recent changes to agency budget and/or management flexibility affected agency operations;
 - Supervisory Span of Control Report from the Department of Administrative Services, Chief Human Resources Office, for agencies with more than 100 employees located at:
<https://www.oregon.gov/das/HR/Pages/Span.aspx>;
 - Summary of proposed technology and capital construction projects;
 - Program prioritization for 2021-23 (form 107BF23)
 - Other Funds ending balance form.