

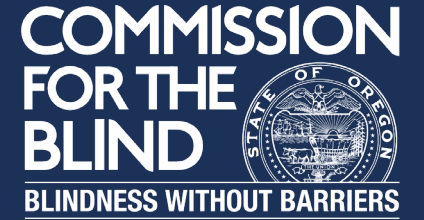
Presentation to the 2025 Joint Ways and Means Subcommittee on Human Services

## REFERENCE MATERIALS

# Oregon Commission for the Blind

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Dacia Johnson, MS, CRC  
Executive Director  
February 26, 2025



[Link to OCB's Governor's Recommended Budget 2025-27](#)

# AGENCY OPERATIONAL FRAMEWORK



Shared Services -  
Human Resources  
and Information  
Technology Data  
Storage



Data/Performance  
Outcome  
Management  
System



Employee and  
Stakeholder  
Engagement



Strategic Planning  
-  
Succession  
Planning



Internal Auditing  
and Risk  
Management



# AGENCY OUTREACH STRATEGIES

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Strengthen relationships with community-based organizations and medical providers in non-urban and rural communities.



Expand partnerships with Worksource Centers and business community throughout Oregon to improve access to training services, safety net supports and career opportunities.



Rehabilitation counseling and teaching staff travel and spend time in the communities they serve to form relationships and trust.



Increase capacity for delivering rehabilitation services and expanding remote service delivery options.

# AGENCY PROCESS & PERFORMANCE MEASURES

## OPERATING PROCESSES

## SUPPORTING PROCESSES

CORE PROCESSES	Conducting Public Education and Outreach	Determining Client Eligibility	Assessing Needs and Developing Plans	Delivering Independent Living Services	Delivering Employment Services	Developing and Supporting Staff	Managing Finances and Physical Assets	Managing Information Technology	Managing Compliance and Risk	Managing Agency Performance			
SUB PROCESSES	OP1	OP2	OP3	OP4	OP5	SP1	SP2	SP3	SP4	SP5			
	<ol style="list-style-type: none"> <li>1. Representing the Governor's policies.</li> <li>2. Taking strategic direction from the Commission.</li> <li>3. Educating the legislature.</li> <li>4. Engaging stakeholders and staff.</li> <li>5. Facilitating and participating in community events.</li> <li>6. Soliciting program referrals.</li> <li>7. Collaborating with consumer groups.</li> <li>8. Partnering with businesses, agencies, organizations.</li> <li>9. Advocating for accessibility and inclusion.</li> </ol>	<ol style="list-style-type: none"> <li>1. Identifying client interests and needs.</li> <li>2. Explaining agency services &amp; processes.</li> <li>3. Matching client to correct program.</li> <li>4. Obtaining required eye/diagnostics &amp; application signature.</li> <li>5. Confirming referral meets program requirements.</li> <li>6. Identifying client functional limitations &amp; appropriate agency services.</li> <li>7. Determining eligibility</li> <li>8. Notifying client of eligibility status &amp; resources.</li> </ol>	<ol style="list-style-type: none"> <li>1. Assessing client needs, abilities, &amp; strengths.</li> <li>2. Identifying appropriate equipment and services.</li> <li>3. Developing services plan.</li> <li>4. Obtaining client agreement.</li> <li>5. Initiating service delivery.</li> </ol>	<ol style="list-style-type: none"> <li>1. Authorizing equipment purchase.</li> <li>2. Teaching in-home techniques of daily living.</li> <li>3. Teaching community access skills.</li> <li>4. Connecting to appropriate resources.</li> <li>5. Monitoring progress.</li> <li>6. Adjusting plan as needed.</li> <li>7. Verifying goals are met.</li> <li>8. Closing cases.</li> </ol>	<ol style="list-style-type: none"> <li>1. Identifying services and equipment providers.</li> <li>2. Authorizing services and equipment purchases.</li> <li>3. Initiating training referrals.</li> <li>4. Delivering training and equipment.</li> <li>5. Monitoring progress</li> <li>6. Amending plan as needed.</li> <li>7. Obtaining client approval.</li> <li>8. Verifying goals are met.</li> <li>9. Closing vocational rehabilitation cases.</li> <li>10. Supporting BE client success.</li> </ol>	<ol style="list-style-type: none"> <li>1. Evaluating and identifying staffing needs.</li> <li>2. Recruiting for vacant positions.</li> <li>3. Hiring qualified applicants.</li> <li>4. Orienting new employees.</li> <li>5. Training and developing staff.</li> <li>6. Managing employee performance.</li> <li>7. Recognizing performance.</li> <li>8. Retaining quality staff.</li> <li>9. Maintaining a positive and professional work-place.</li> </ol>	<ol style="list-style-type: none"> <li>1. Managing agency budget.</li> <li>2. Managing revenue.</li> <li>3. Managing payroll.</li> <li>4. Paying invoices.</li> <li>5. Managing receivables.</li> <li>6. Purchasing goods and services.</li> <li>7. Compiling and submitting reports.</li> <li>8. Managing office facilities.</li> <li>9. Managing assets.</li> </ol>	<ol style="list-style-type: none"> <li>1. Monitoring Systems.</li> <li>2. Enhancing Performance.</li> <li>3. Responding to Help Desk Tickets.</li> <li>4. Ensuring System Uptime.</li> <li>5. Managing Resources &amp; Licenses.</li> <li>6. Ensuring System Security.</li> <li>7. Planning for Future Needs.</li> <li>8. Coordinating IT Disaster Recovery.</li> </ol>	<ol style="list-style-type: none"> <li>1. Ensuring employee safety.</li> <li>2. Developing policies and procedures.</li> <li>3. Monitoring policy and procedure compliance.</li> <li>4. Assessing risk.</li> <li>5. Conducting audits.</li> <li>6. Evaluating audit findings.</li> <li>7. Taking corrective action.</li> <li>8. Monitoring effectiveness.</li> </ol>	<ol style="list-style-type: none"> <li>1. Developing strategic plan.</li> <li>2. Implementing strategic initiatives.</li> <li>3. Creating measures.</li> <li>4. Measuring agency progress.</li> <li>5. Evaluating agency performance.</li> <li>6. Prioritizing improvement opportunities.</li> <li>7. Identifying constraints.</li> <li>8. Making program improvements.</li> </ol>			
PROCESS OWNERS	Jonathan	Jim	Ron	Malinda	Angel	Dacia/Kat	Kat	Kat	Michael	Dacia			
PROCESS MEASURES	<ol style="list-style-type: none"> <li>1. OP1a. Urban outreach and education activities – all programs.</li> <li>2. OP1b. Rural outreach and education activities – all programs.</li> <li>3. OP1c. Client referrals.</li> <li>4. OP1d. Successful client referrals.</li> </ol>	<ol style="list-style-type: none"> <li>1. OP2a. Number of applicants determined eligible for VR.</li> <li>2. OP2a(1). Number of Part B referrals to application.</li> <li>3. OP2b. Time from referral to application, all programs.</li> <li>4. OP2c. VR application to eligibility.</li> </ol>	<ol style="list-style-type: none"> <li>1. OP3a. Signed VR plans.</li> <li>2. OP3b. Timely assessments.</li> <li>3. OP3c. VR eligibility to plan.</li> </ol>	<ol style="list-style-type: none"> <li>1. OP4b(1). OB any increase in IL skills.</li> <li>2. OP4b(2). Part B any increase in IL skills.</li> <li>3. OP4c. OB/Part B successful closures.</li> <li>4. OP4d. Increase VR Client independent living skills</li> </ol>	<ol style="list-style-type: none"> <li>1. OP5a. Signed VR plan amendments.</li> <li>2. OP5b. VR Internal training request to service delivery.</li> <li>3. OP5c. Number of successful VR closures.</li> </ol>	<ol style="list-style-type: none"> <li>1. SP1a. Performance recognition.</li> <li>2. SP1b(1). Days to hire.</li> <li>3. SP1b(2). Number of failed recruitments.</li> <li>4. SP1c. Staff engagement.</li> <li>5. SP1d. Staff orientation.</li> <li>6. SP1d. Timely performance check-ins.</li> </ol>	<ol style="list-style-type: none"> <li>1. SP2a. Revenue plan to actual.</li> <li>2. SP2b. Timely federal reports.</li> <li>3. SP2c. Monthly Cascading Measure performance.</li> </ol>	<ol style="list-style-type: none"> <li>1. SP3a. Customer satisfaction.</li> <li>2. SP3b. System uptime.</li> </ol>	<ol style="list-style-type: none"> <li>1. SP4a. Business practice reviews.</li> <li>2. SP4b. Client safety incidents.</li> <li>3. SP4c. Staff safety incidents.</li> <li>4. SP4d. Material findings.</li> </ol>	<ol style="list-style-type: none"> <li>1. SP5a. Measures improvement.</li> <li>2. SP5b. Outcome performance.</li> <li>3. SP5c. Active problem-solving teams.</li> <li>4. SP5d. Process performance.</li> <li>5. SP5e. QTR Timeliness.</li> </ol>			
OUTCOME MEASURES AND OWNER	OM 1 Staff Engagement Dacia	OM 2 Team Member Proficiency Ron	OM 3 Number of Clients Served Malinda	OM 4 Business Partnerships Jonathan	OM 5 Team Utilization Jim	OM 6 Accessibility Compliance Jim	OM 7 Spending to Budget Kat	OM 8 Strong Internal Controls Clay	OM 9 Timely Service Delivery Angel	OM 10 Client Satisfaction Angel	OM 11 BE Client Performance Ron	OM 12 Client Employment Angel	OM 13 Client Independence Malinda

# MANAGING AGENCY PERFORMANCE

Agency monitors process measures to ensure Oregonians who are blind are getting services they need at the time they need them.

Time from application to eligibility in the Vocational Rehabilitation Program for FFY 2024 was an average of 18.49 days, 41.5 days below the 60 days allowed by federal law.

Time from eligibility to plan development was an average of 26.3 days in FFY 2024, 63.7 days below the 90 days allowed by federal law.

Conducting Public Education and Outreach	Determining Client Eligibility	Assessing Needs and Developing Plans	Delivering Independent Living Services	Delivering Employment Services
OP1	OP2	OP3	OP4	OP5
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Time from referral to application for Older Blind Independent Living Program was at 46.64 days last quarter.

# MANAGING AGENCY PERFORMANCE

## Initiatives to increase performance:

Measure	Purpose	Target Group	Technical Support Provider
<ul style="list-style-type: none"><li>• Increase Measurable Skills Gain - Client progress made in pursuit of educational goals or accredited training programs</li></ul>	<ul style="list-style-type: none"><li>• Assure quarterly 911 reports are accurately reporting Measurable Skill Gains and supporting documentation is in the case file, accurate, and complete.</li></ul>	<ul style="list-style-type: none"><li>• All Vocational Rehabilitation clients.</li></ul>	<ul style="list-style-type: none"><li>• The Interwork Institute at San Diego State University's Research Foundation.</li></ul>
<ul style="list-style-type: none"><li>• Increase Accuracy in Capturing Pre-ETS Services</li></ul>	<ul style="list-style-type: none"><li>• Assure quarterly 911 reports are accurately reporting Pre-ETS Services (including all Pre-ETS internal and external services.</li></ul>	<ul style="list-style-type: none"><li>• Pre-ETS (including Potentially Eligible) clients ages 14-21.</li></ul>	<ul style="list-style-type: none"><li>• The George Washington University Center for Rehabilitation Counseling Research and Education.</li></ul>

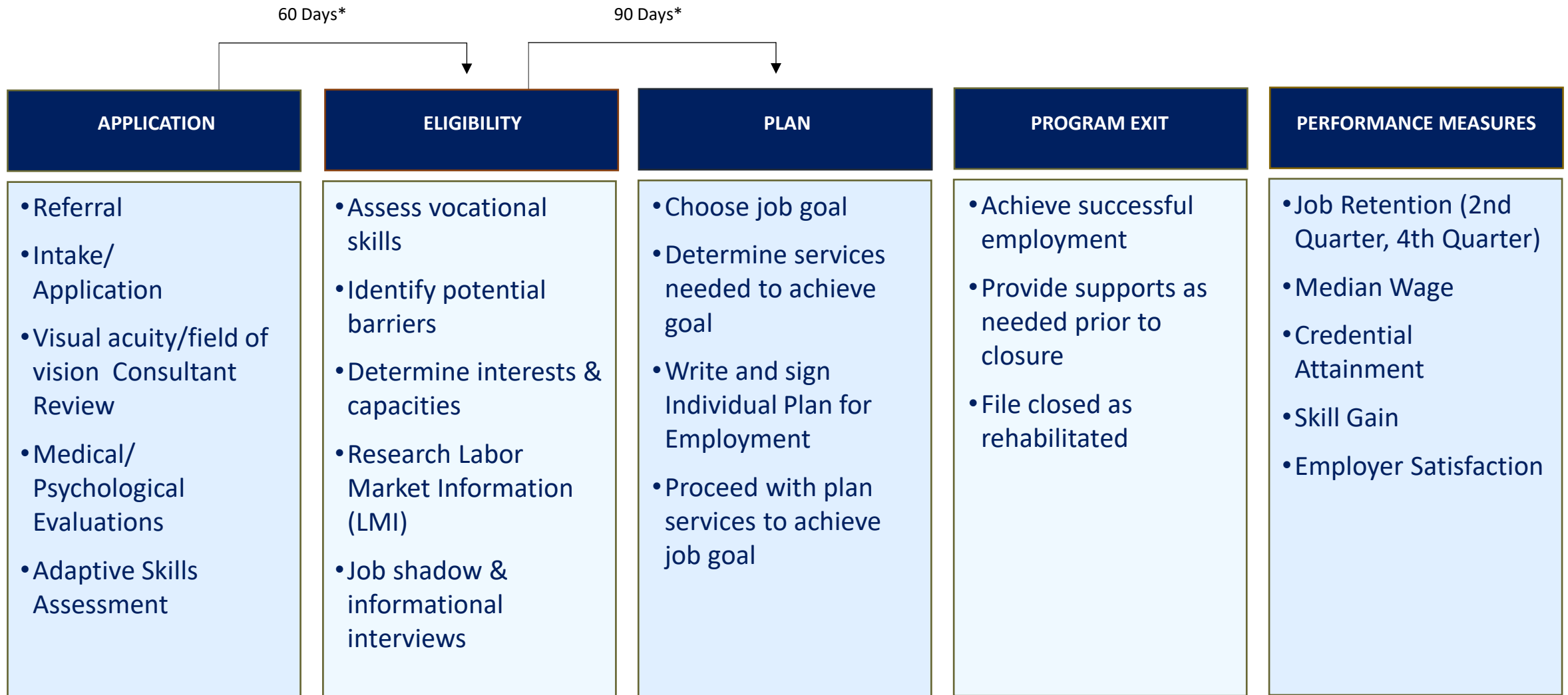
# WORKFORCE CHALLENGES

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- **Recruitment of specialized staff** (cane travel, technology, braille) requires extensive, national recruitment efforts to fill key positions.
- There are a **small number of educational institutions nationwide** with programs to prepare the future workforce in specialized disciplines.
- **Workforce has shifted** – No longer the norm to work in the same job for many years; the younger workforce values flexibility, work-life balance.
- Turnover in key positions impacts all areas due to being a small agency where **staff perform multiple roles**.
- Statewide Systems designed for Enterprise/large agencies are **not easily adapted** for small agencies with fewer staff.
- **Staff at maximum capacity** to take on additional workload in all areas of the agency.

# VOCATIONAL REHABILITATION CLIENT PROCESS



\* Number of days allowed by federal law



# VOCATIONAL REHABILITATION EXPECTED BIENNIUM OUTCOMES



Achieve competitive, integrated and employment outcomes for 120 Oregonians who are blind.



Monitor and track expenditures and workload and determine whether Order of Selection is warranted consistent with federal law.



Maintain an average hourly wage at closure that is at least 25% above minimum wage.



Provide VR services to approximately 850 clients with an average time of service of three years.



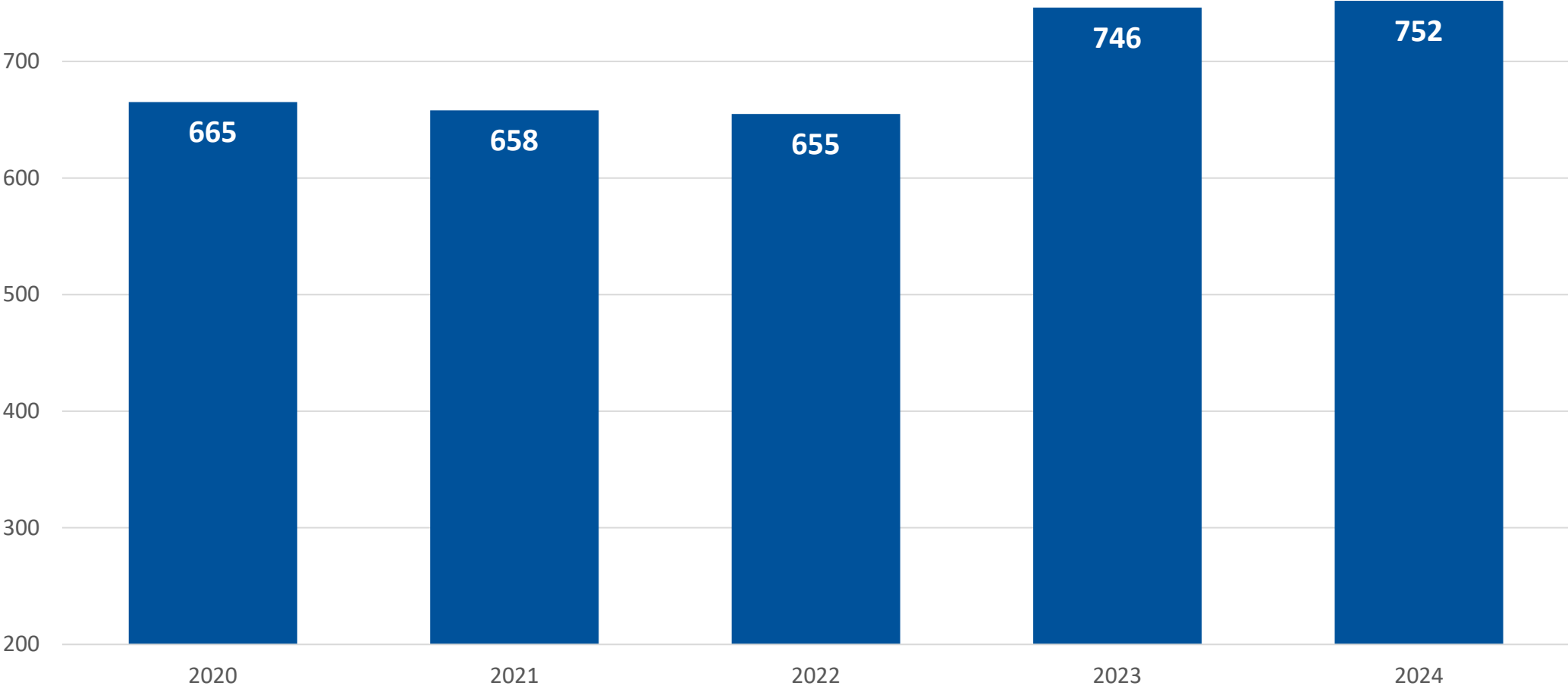
Expend at least 15% of VR budget on Pre-Employment Transition Services (as required under the Workforce Innovation and Opportunity Act).



Identify potential strategies within existing resources to increase job retention of individuals post exit.

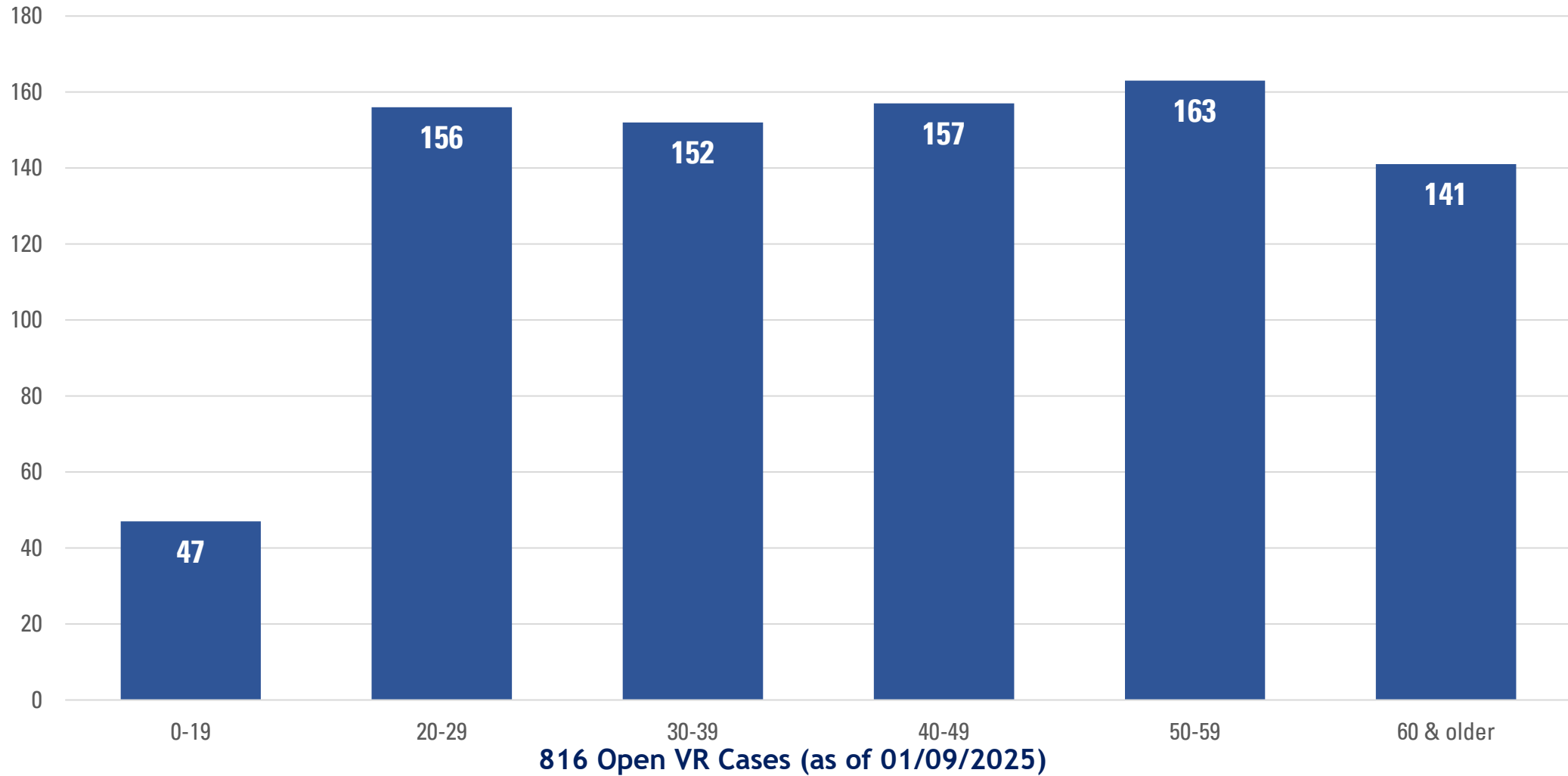
# VR CASELOAD DATA - # OF CLIENTS SERVED BY FFY

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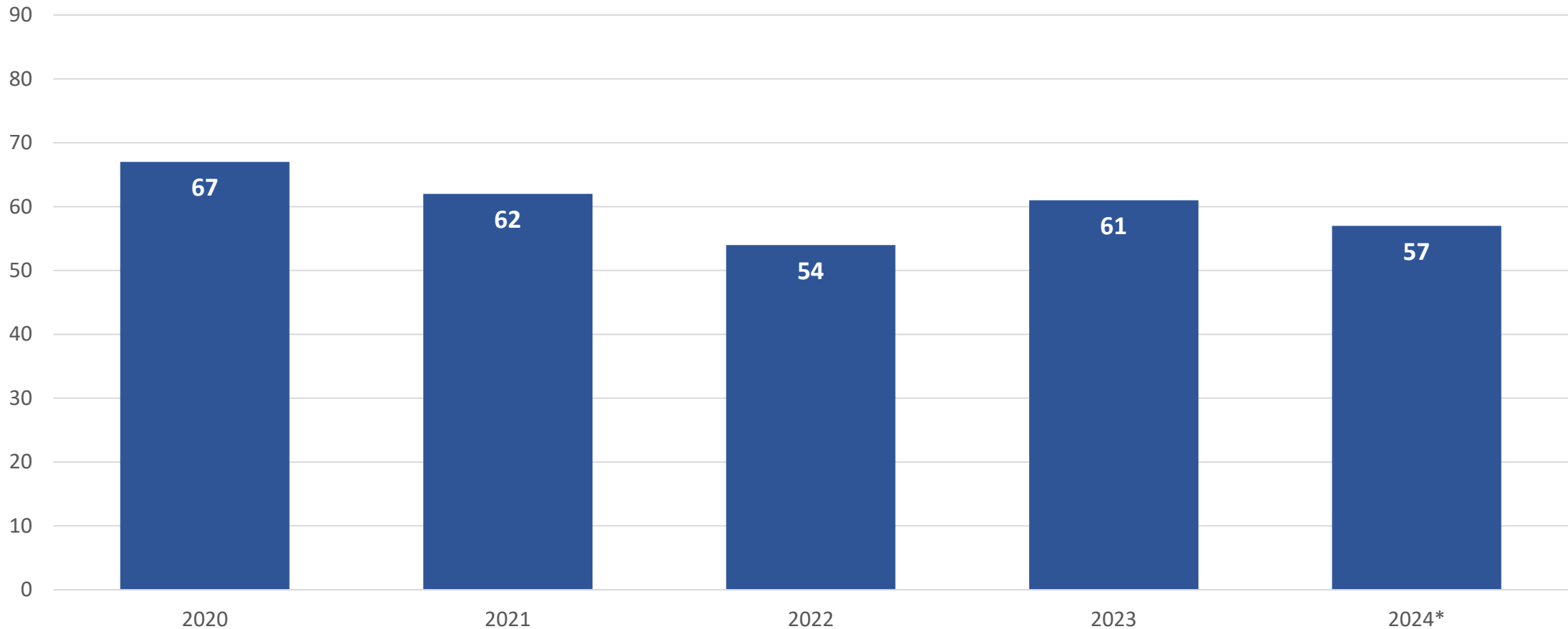
# VR CASELOAD DATA- OPEN CASES BY AGE GROUP

Including Pre-ETS and Potentially Eligible Clients



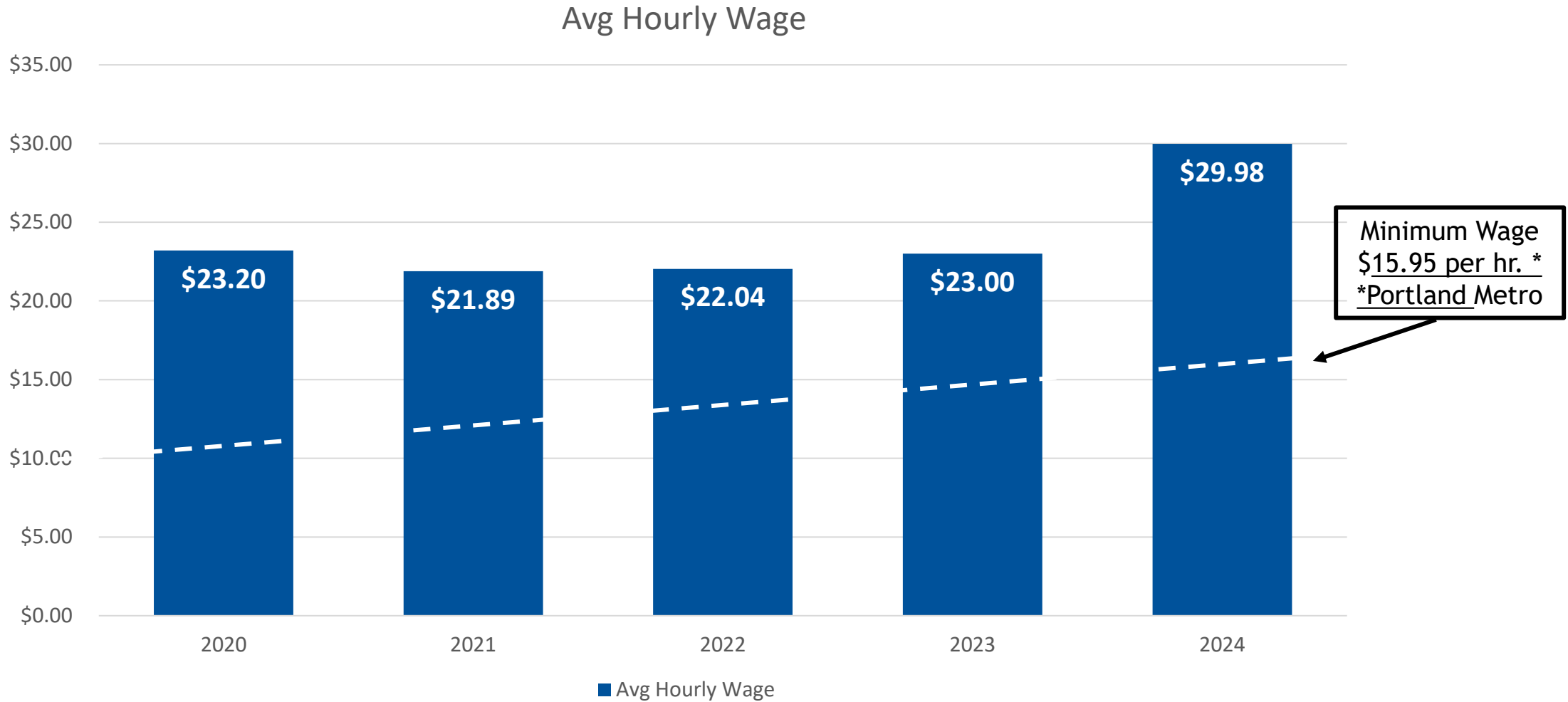
# VR CASELOAD DATA – EMPLOYMENT OUTCOMES

Defined as maintaining employment for a minimum of 90 days as a result of a comprehensive rehabilitation plan. This measure was eliminated under WIOA.



\*As of January 2025, have 73 clients in employment status, not yet able to close due to instability in work environment/VR supports still needed.

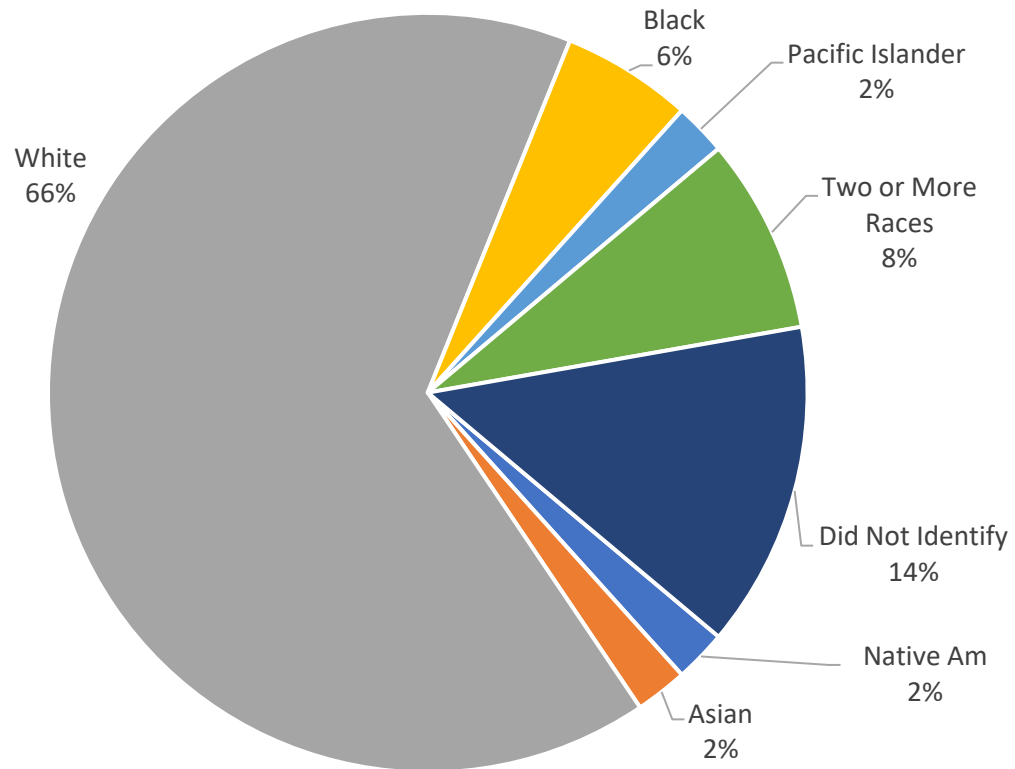
# VR CASELOAD DATA – AVG. HOURLY WAGE AT CLOSURE



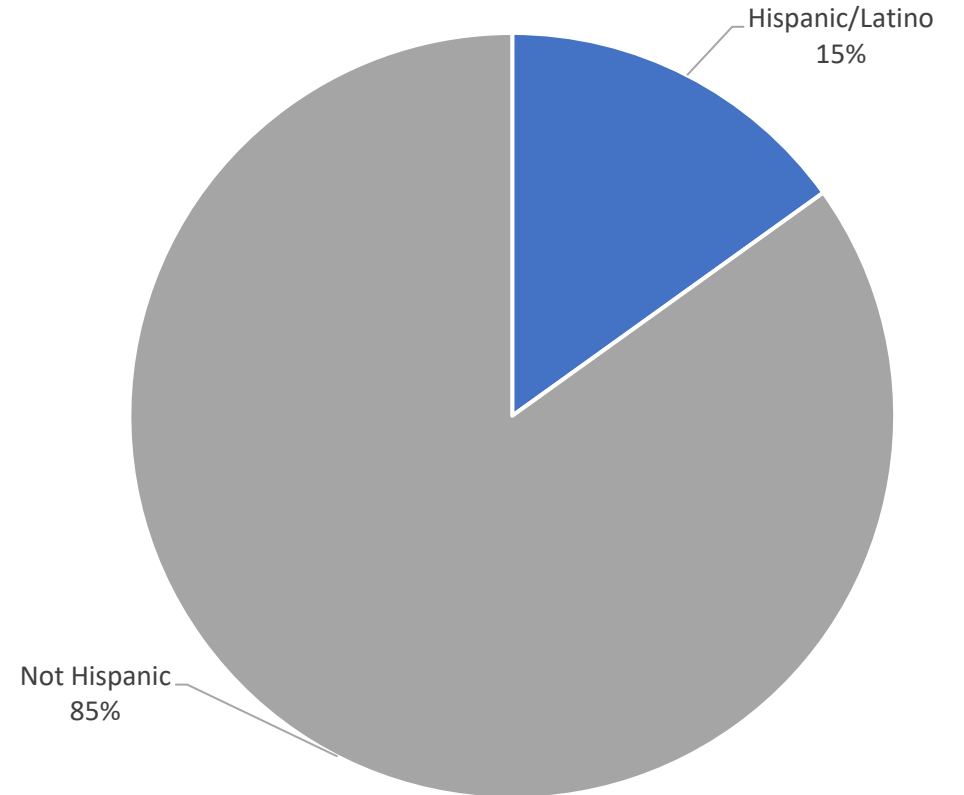
**Target:** Maintain average hourly wage at closure above 25% of highest minimum wage in the state.

# VR CASELOAD DATA: RACE & ETHNICITY

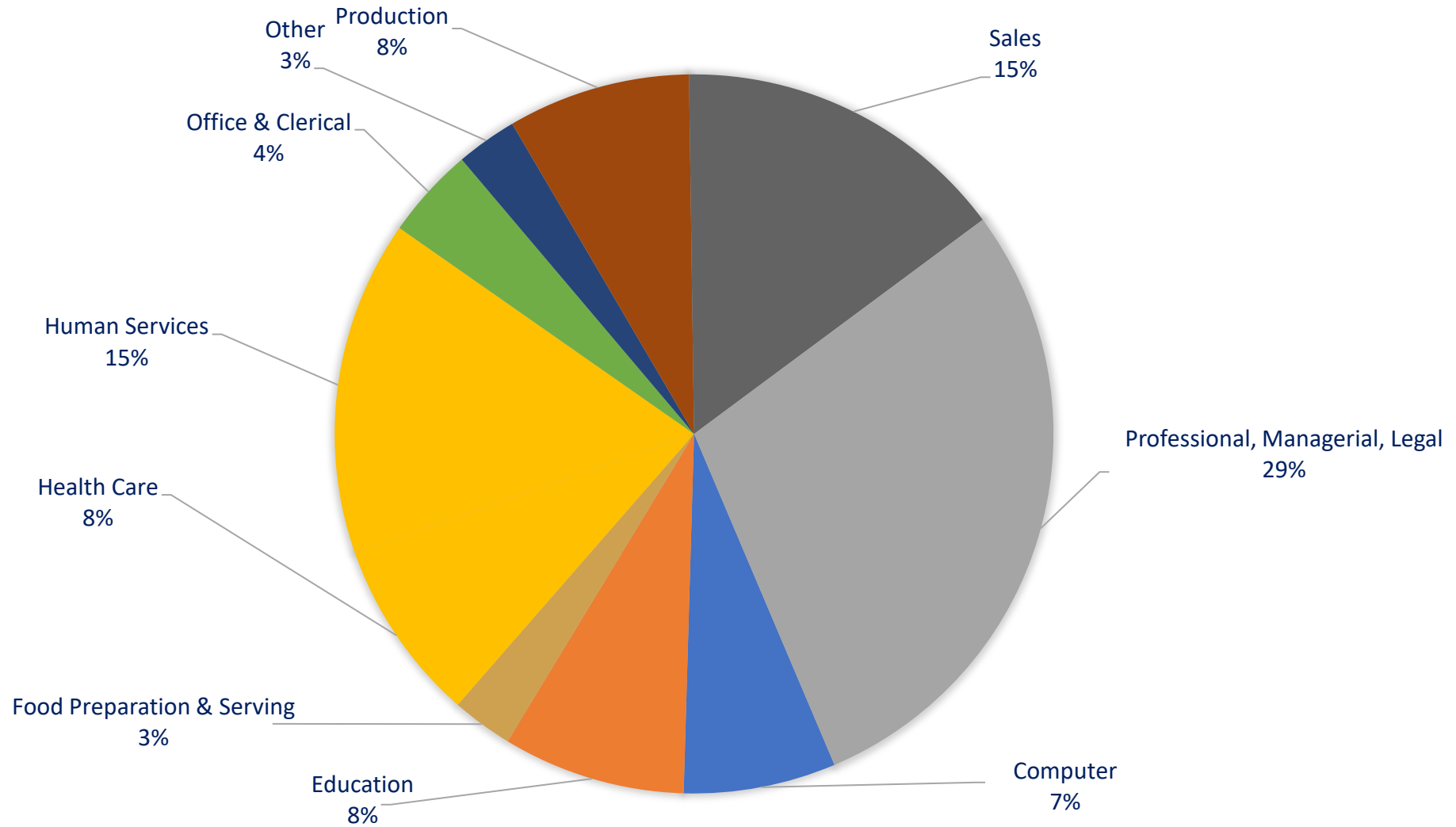
Race VR Caseload Data FFY 2024



Ethnicity VR Caseload Data FFY 2024



# VR CASELOAD DATA – JOB PLACEMENT BY OCCUPATION



Note: BE Managers included in 'Professional, Managerial, Legal'

# Summer Work Experience Program (SWEP)

## VOCATIONAL REHABILITATION

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### PURPOSE

- Provide community-based summer jobs for youth who are legally blind.
- Instruction in independent living and alternative skills in applied learning environments
- Assist youth in transitioning from school to work or post-secondary education.
- Partner with Department of Education, Department of Human Services, and schools to enhance student preparedness for post-graduation.

### TARGET GROUP

Youth who are blind or visually impaired, aged 16-21.

### INDIVIDUALIZED EMPLOYMENT SERVICES

- Work experience in community-based jobs.
- Job search/interviewing skills
- Career Exploration
- Self Advocacy skill development
- Exposure to living on a college campus.
- Competitive work experiences with supports.
- Mentoring.
- Independent living skills training.
- Training on use of public transportation.
- Development of leadership and problem-solving skills.

### SERVICE DELIVERY SYSTEM

- Residential program at Portland State University.
- Community-based work experiences.



# SUPPORTED EMPLOYMENT PROGRAM

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## PURPOSE

Assist individuals with significant disabilities, including Intellectual and Developmental Disabilities (I/DD), find community-based, competitive, integrated employment opportunities.

## TARGET GROUP

Individuals with significant disabilities, including intellectual and Developmental Disabilities (I/DD).

## INDIVIDUALIZED EMPLOYMENT SERVICES

OCB is currently serving 48 clients who receive Supported Employment services.

- 31 clients are age 25 or older.
- 17 clients are age 24 or younger.
- Clients with recent successful case closures work in diverse fields, including:
  - Customer Service Representatives.
  - Proofreaders and Copy Markers.
  - Shipping and Receiving.

Production and Assembly.

OCB is also involved with groups leading policy advancement in Oregon, including:

- Oregon's state-wide Employment First Advisory Group.
- Employment First regional stakeholder meetings.

# Customer Feedback:

## VOCATIONAL REHABILITATION SURVEY RESULTS

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96%

of clients surveyed that they **collaborated with their counselor** in developing their plan and worked together on the steps necessary to reach their goal.

90%

of clients surveyed indicated that the **services received** help them prepare for and obtain the type of **employment** on their plan.

100%

of clients surveyed indicated their **interests, skills, and abilities** were taken into account during the pre-employment process.

96%

of clients surveyed indicated that the **communication** with their Vocational Rehabilitation Counselor was **respectful, timely and productive**.

# ORIENTATION & CAREER CENTER BIENNIUM OBJECTIVES

Provide training to 250 Oregonians who are blind. Of that number, we will provide the following:



- 350 assessments and training in technology.
- 435 assessments and training in Techniques of Daily Living.
- 175 assessments and training in cane travel skills.



Ensure individuals who complete training have measurable improvement in daily living, orientation & mobility, communication, and technology skills.



Provide each client with pre- and post-training assessments to measure impact of instruction.

# BUSINESS ENTERPRISE PROGRAM BIENNIUM OBJECTIVES



**Assist BE managers to increase profitability of facilities.**

Maximize locations to meet the customer needs and maintain profitability standards.

Increase facility earnings for vending facility managers below program target.



**Pursue and obtain new contracts with local, state, and federal agencies.**

Pursue additional business opportunities and partnerships

Provide training for new BE Managers and continuing education for existing BE Managers.



**Explore New Business Models.**

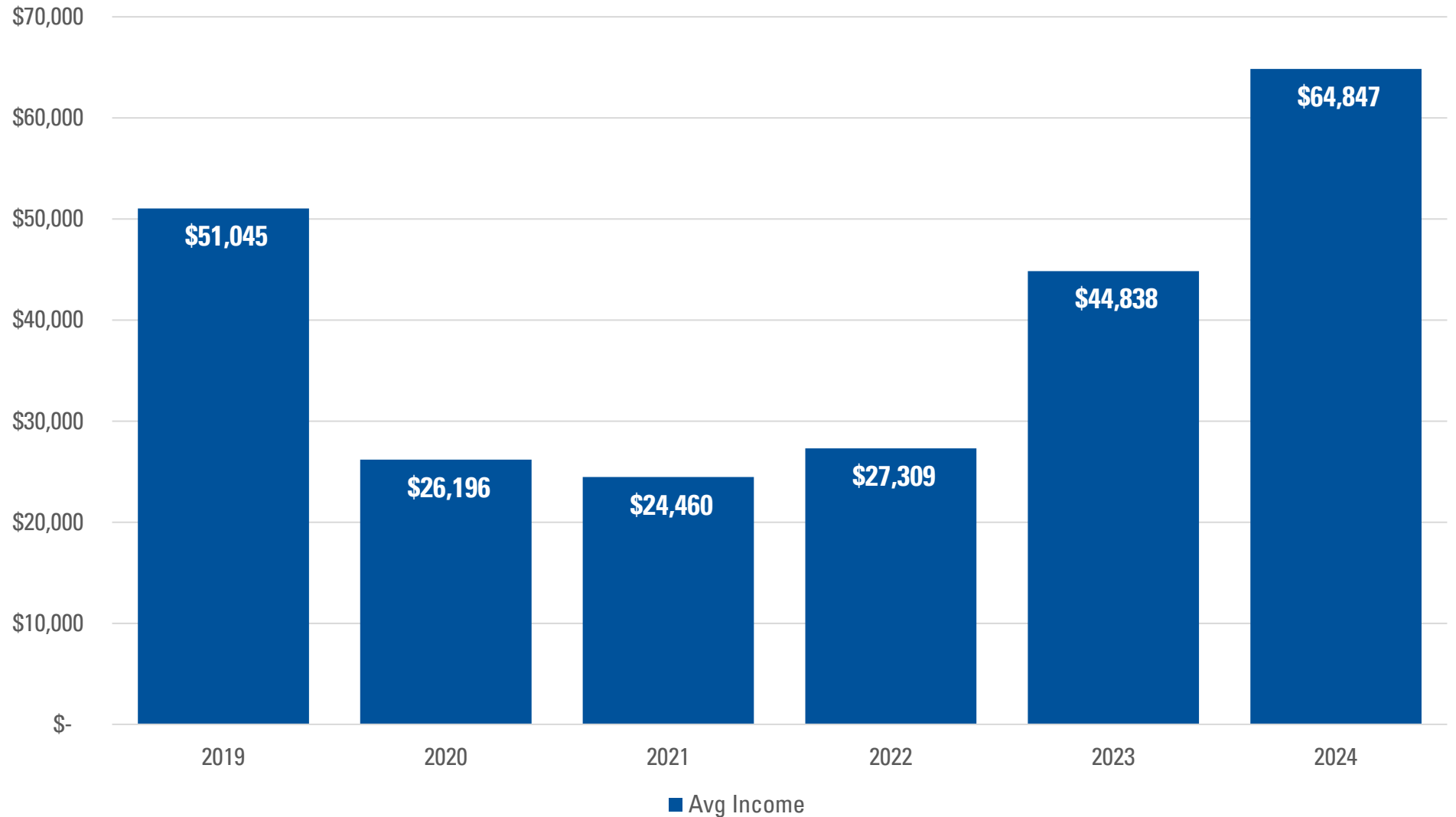
Invest in innovative i.e.; vending machines, micro market/smart store coolers, food carts.

# BUSINESS ENTERPRISE PROGRAM EARNINGS

PERCENTAGE OF REPORTS RECEIVED ON TIME

2022	91.5%
2023	97.3%
2024	97.1%

**95%**  
Target



# INDEPENDENT LIVING CLIENT PROCESS



\* Agency performance measure target

# INDEPENDENT LIVING BIENNIUM OBJECTIVES



Retain specialized staff who are trained in the field of blindness and have a strong passion to serve Oregonians with a visual impairment.



Provide every referred older blind Oregonian with timely and comprehensive services from well-prepared and knowledgeable staff.



Continue to strengthen partnerships with eye care providers to ensure all Oregonians over the age of 55 with vision loss are referred to our program.

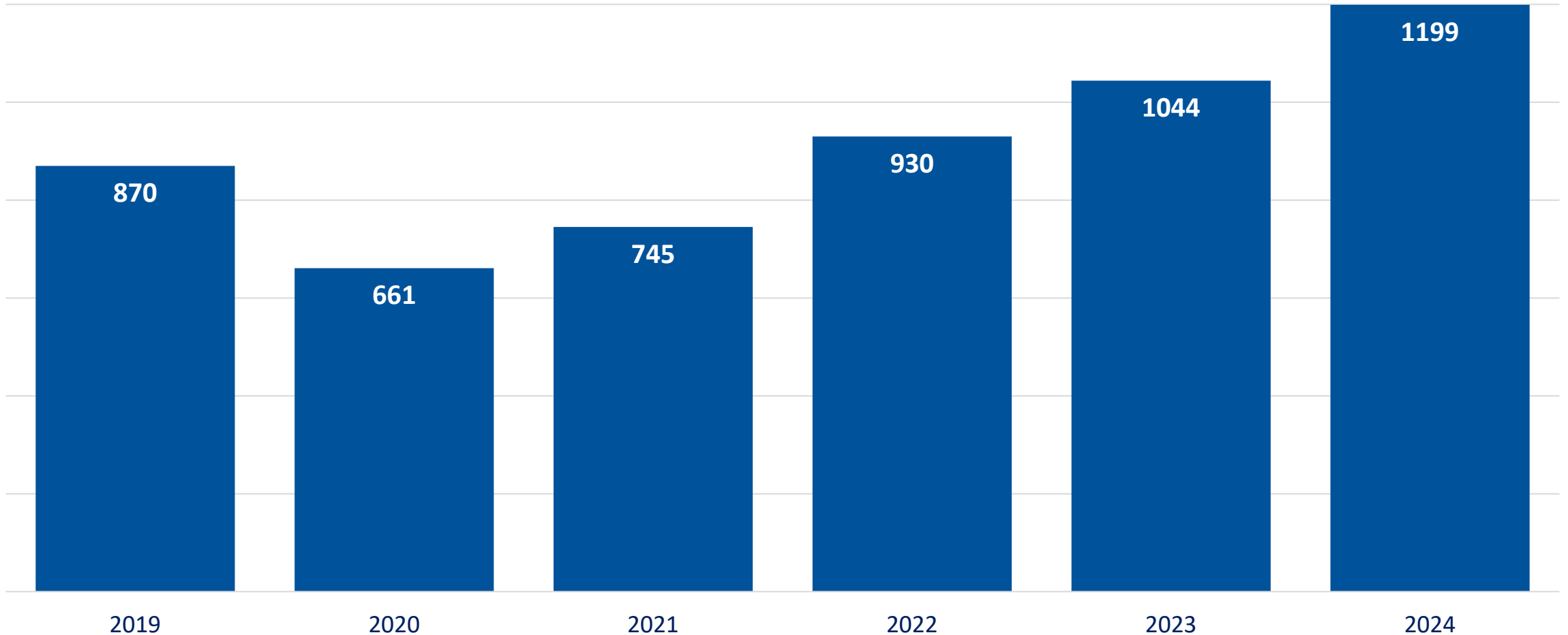


Consistently achieve performance target to initiate services within 15 days from date of referral.

# INDEPENDENT LIVING – CASELOAD DATA

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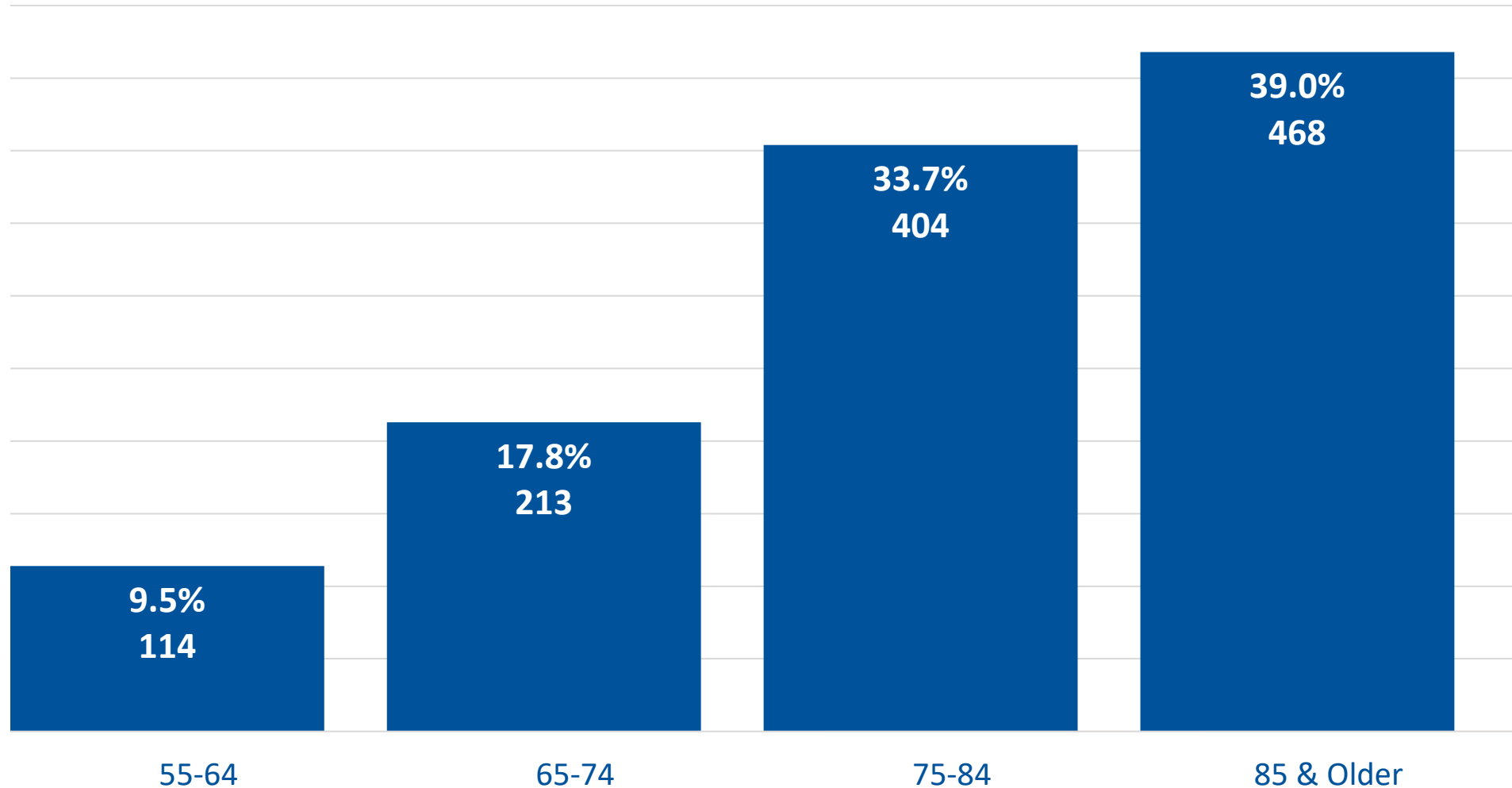
Number of Clients Served in Older Blind Program





# INDEPENDENT LIVING – OLDER BLIND CLIENT CHARACTERISTICS FFY 2024

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# Customer Feedback:

## INDEPENDENT LIVING PROGRAM

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**“Keep doing what I experienced!”**

**“You have great service and communication.”**

**“The individual home training was essential. I wouldn’t have learned it without being home and getting a one-to-one demo.”**

**“You were very helpful and knowledgeable and helped me get tools to make my life easier.”**

**“I felt more confident that there is help as my eyesight gets worse.”**

**“Training at home is great! I was able to stay in my book group.”**

**“Having a vision specialist show up in my home with aids is a wonderful service.”**

**“Excellent communication and timely completion of commitments.”**

**“You made me feel I could cope with my vision loss.”**

**“I feel I can take care of myself now!”**

**“It’s a whole new world to me!”**

# ADMINISTRATIVE SERVICES

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## PURPOSE

- Overall agency direction and supervision
- Board Administration
- Executive Directors Office
- Financial and accounting management
- Federal reporting and accountability
- Information technology management and security
- Internal audit
- Administrative support for programs

## SUPPORT TO PROGRAMS

- Financial Reporting and Analysis
- Procurement and Purchasing
- Travel
- Grant Management
- Federal and State Reporting
- Timekeeping and Payroll
- Administrative Support
- Reception
- Customer Service and Sales of Specialty Equipment
- Case Management Data Entry
- Quality Assurance
- Internal Controls/Business Monitoring

## CORE SERVICES

- Budgeting
- Accounting
- Finance
- Facilities
- Human Resources
- Commission Board Administration and Support
- Information Technology and Security

# ADMINISTRATIVE SERVICES EXPECTED BIENNIUM OUTCOMES

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**Maintain compliance with all applicable federal and state regulations and policy in areas of responsibility.**

**Effective budget development and monitoring.**

**Timely and accurate transactional processing, maintenance of employee records.**

**Internal auditing and controls, measurement of business processes.**

**Manage operations using a continuous improvement cycle review process.**

**Information Technology Services and Security.**

**Accurate and timely year-end financial reporting.**

# SFY 2023 Federal Compliance Audit Status

Finding	Management Response
<p><b>Finding 2023-031:</b> Improve controls over compliance reporting</p>	<p>We agree with this recommendation.</p> <p>The agency is committed to ensuring the RSA-911 client case information report is accurate and well supported. The agency's practice is to maintain documentation that supports information contained in the case management system. This practice includes requesting information from clients regarding the start date of employment in the primary occupation and the hourly wage at exit. This information can be difficult to locate due to the numerous case notes in the case management system.</p> <p>Due to the difficulty locating this documentation in the tight timelines of the audit, the agency spent some additional time attempting to locate it after the audit testing period had closed. The agency did find the supporting documentation for one of the two clients that was not located during the audit. For the other client, the agency identified documentation showing that we had requested this information from the client through multiple methods, but it was never received.</p> <p>The agency has created a new case-note category for documenting client employment start date and wages at exit. The agency will provide training to staff on the use of this case note category to ensure this documentation is able to be located more easily and to reinforce the importance of maintaining documentation to support information contained in the case management system.</p> <p>Anticipated Completion Date: August 1, 2024 Completed: August 1, 2024</p>
<p><b>Finding 2023-032:</b> Seek clarification from federal awarding agency on appropriateness of legal fees</p>	<p>We agree with this recommendation.</p> <p>The agency believes it is allowable to use VR funds for legal fees based upon the guidance provided by 2 CFR § 200.459, which allows for professional service costs. The agency has previously asked for clarification regarding this issue from the Rehabilitation Services Administration, and we are awaiting their response. We will contact them again requesting clarification.</p> <p>The completion date for this finding is dependent upon receipt of clarification and guidance from the Rehabilitation Services Administration.</p> <p>Anticipated Completion Date: December 31, 2024 Completed: November 19, 2024</p>

# AGENCY BUDGET ISSUES FOR 2023-25



**Budget issues that  
affect agency  
operations through  
6/30/25**

Case service costs have increased; including technology and job training

Federal limitation for services to clients will not be adequate to meet projected client needs

Increased personnel costs due to cost of living and pay equity adjustments for employees

Administrative positions not aligned with approved federal indirect cost requirements

# PROGRAM PRIORITIZATION

## Program Prioritization for 2025-27

Agency Name: Commission for the Blind																			Agency Number: 58500		
2025-27 Biennium																					
Program 1																					
Program/Division Priorities for 2025-27 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program-Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL included in Agency Request	
Agcy	Prgm/Div																				
1	1	CFB	VR	Vocational Rehabilitation Services	1,2,3,4	7	3,473,699		608,591		11,818,044	\$ 15,900,334			N	Y	FM	PL 113-128	Maintain Vocational Rehabilitation Program	Expanded capacity for service delivery and provide outreach to underserved / underserved communities while investing in current employees	
1	1	CFB	OCCB	Vocational Rehabilitation - Orientation and Career Center for the Blind	1,2,3,4	7	1,069,469		2,385		3,009,649	\$ 4,081,503			N	Y	FM	PL 113-128	Maintain Vocational Rehabilitation Program	Expanded capacity for service delivery and provide outreach to underserved / underserved communities while investing in current employees	
2	1	CFB	IL-OB	Independent Living - Older Blind	2,3,4	7	1,629,507				1,620,505	\$ 3,250,012			Y	Y	FM	PL 113-128	Maintain Independent Living Program	Expanded capacity for service delivery and provide outreach and tools to underserved / underserved communities while investing in current employees	
3	1	CFB	BE	Business Enterprise Program	1,3,4	7	536,274		518,800		1,079,631	\$ 2,434,705			N	Y	FO	ORS 346.510-570	Various licensing and regulatory functions	Modernization and transformation of the program using lessons learned during the pandemic	
n/a	n/a	CFB	Admin	Administrative Services	3,4	4	2,325,549		18,646		4,377,585	\$ 6,721,780			N	Y			Maintain support of Vocational Rehabilitation and Independent Living Programs	Investments are intended to maintain alignment with the Strategic and Operational Priorities of the Department of Administrative Services Enterprise Information Services in the area of Information Technology	
												\$ -									
												\$ -									
												\$ -									
							9,034,498		1,148,422		21,905,414	\$ 32,088,334	0	0.00							

### 7. Primary Purpose Program/Activity Exists

- 1 Civil Justice
- 2 Community Development
- 3 Consumer Protection
- 4 Administrative Function
- 5 Criminal Justice
- 6 Economic Development
- 7 Education & Skill Development
- 8 Emergency Services
- 9 Environmental Protection
- 10 Public Health
- 11 Recreation, Heritage, or Cultural
- 12 Social Support

### 19. Legal Requirement Code

- C Constitutional
- D Debt Service
- FM Federal - Mandatory
- FO Federal - Optional (once you choose to participate, certain requirements exist)
- S Statutory

Within each Program/Division area, prioritize each Budget Program Unit (Activities) by detail budget level in ORBITS

# OTHER FUND ENDING BALANCE FORM

Commission for the Blind (OCB)					2025-27 Biennium					Contact Person (Name & Phone #): Kathleen (Kat) Martin, (971) 673-1588
Updated Other Funds Ending Balances for the 2023-25 and 2025-27 Bienna										
(a) Other Fund Type	(b) Program Area (SCR)	(c) Treasury Fund #/Name	(d) Category/Description	(e) Constitutional and/or statutory reference	(f) 2023-25 Ending Balance		(g) 2025-27 Ending Balance		(i) Comments	
					In LAB	Revised	In CSL	Revised		
Limited		5850006000 / Bequests & Donations	Other - Donations Fund	ORS 346.270	0	1,030,556	0	859,077	This account is not included in the budget. This has historically been used when requested by Legislature. Projections for 2025-27 include an assumption that \$300,000 will be used to provide interpretative services through 3rd party vendor and assistive equipment to the older blind.	
Limited		5850007000 / Business Enterprise	Other - Business Enterprise Set Aside	ORS 346.569	0	290,304	0	304,729	This account is off budget and designated for the BE Program Manager and Program expenses. LAB utilized this fund for payroll for position # 0800004.	

**Objective:** Provide updated Other Funds ending balance information for potential use in the development of the 2025-27 legislatively adopted budget.

**Instructions:**

Column (a): Select one of the following: Limited, Nonlimited, Capital Improvement, Capital Construction, Debt Service, or Debt Service Nonlimited.

Column (b): Select the appropriate Summary Cross Reference number and name from those included in the 2023-25 legislatively approved budget. If this changed from previous structures, please note the change in Comments (Column (j)).

Column (c): Select the appropriate, statutorily established Treasury Fund name and account number where fund balance resides. If the official fund or account name is different than the commonly used reference, please include the working title of the fund or account in Column (j).

Column (d): Select one of the following: Operations, Trust Fund, Grant Fund, Investment Pool, Loan Program, or Other. If "Other", please specify. If "Operations", in Comments (Column (j)), specify the number of months the reserve covers, the methodology used to determine the reserve amount, and the minimum need for cash flow purposes.

Column (e): List the Constitutional, Federal, or Statutory references that establishes or limits the use of the funds.

Columns (f) and (h): Use the appropriate, audited amount from the 2023-25 legislatively approved budget and the 2025-27 current service level at Governor's Budget.

Columns (g) and (i): Provide updated ending balances based on revised expenditure patterns or revenue trends. The revised column (i) should assume 2025-27 current service level expenditures, considering the updated 2023-25 ending balance and any updated 2025-27 revenue projections. Do not include adjustments for reduction options that have been submitted. Provide a description of revisions in Comments (Column (j)).

Column (j): **Please note any reasons for significant changes in balances previously reported during the 2023 session.**

Additional Materials: If the revised ending balances (Columns (g) or (i)) reflect a variance greater than 5% or \$50,000 from the amounts included in the LAB (Columns (f) or (h)), attach supporting memo or spreadsheet to detail the revised forecast.





