

# WORK SESSION ORIENTATION

## EDUCATION SUBCOMMITTEE

Wendy Gibson, Principal Legislative Analyst



# Primary Budget Measures

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- Primary budget (or appropriation) measures are agency-specific and are in the 5000 series (House = 5000 series and Senate = 5500 series).
- Budget measures have an emergency clause and are effective on passage, but not operative until July 1, 2025.
- Authority expires at the end of the biennium.

# Legal Budgetary Control

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- Appropriation bills are budgetary control.
- Appropriation bills are [session law](#) ([Oregon Laws](#)).
- Appropriation bills are structured by fund type and may be further delineated by source or type of funds and programs within the agency, which generally correlates to the size of the agency.
- Appropriation bills are not detailed to the expenditure category level.
- Action by either the Legislature or Emergency Board is needed to modify Oregon Law unless the measure provides for Nonlimited authority, which can be modified administratively.

# EXAMPLE OF A SIMPLE BUDGET MEASURE

82nd OREGON LEGISLATIVE ASSEMBLY--2023 Regular Session

## Enrolled Senate Bill 5537

Introduced and printed pursuant to House Concurrent Resolution 23 (2023) (at the request of Oregon Department of Administrative Services)

CHAPTER .....

AN ACT

Relating to the financial administration of the Teacher Standards and Practices Commission; and declaring an emergency.

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

**SECTION 1.** There is appropriated to the Teacher Standards and Practices Commission, for the biennium beginning July 1, 2023, out of the General Fund, the amount of \$1,621,257.

**SECTION 2.** Notwithstanding any other law limiting expenditures, the amount of \$14,704,755 is established for the biennium beginning July 1, 2023, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Teacher Standards and Practices Commission for general operations.

**SECTION 3.** This 2023 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2023 Act takes effect July 1, 2023.

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Enrolled  
House Bill 5014

Introduced and printed pursuant to House Concurrent Resolution 23 (2023) (at the request of Oregon Department of Administrative Services)

CHAPTER .....

AN ACT

Relating to the financial administration of the Department of Education; and declaring an emergency.

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

**SECTION 1.** There are appropriated to the Department of Education, for the biennium beginning July 1, 2023, out of the General Fund, the following amounts, for the following purposes:

- (1) Operations..... \$109,446,753
- (2) Oregon School for the Deaf..... \$ 15,384,563

**SECTION 2.** There are appropriated to the Department of Education, for the biennium beginning July 1, 2023, out of the General Fund, the following amounts, which are to be distributed as grants-in-aid, for program costs and to purchase services, for the following purposes:

- (1) Early intervention services and early childhood special education programs ..... \$195,333,054
- (2) Other K-12 grant-in-aid programs..... \$141,506,597
- (3) Youth development programs... \$ 15,324,869

**SECTION 3.** Notwithstanding ORS 327.856, there is appropriated to the Department of Education, for the biennium beginning July 1, 2023, out of the General Fund, the amount of \$147,234,632 for deposit into the High School Graduation and College and Career Readiness Fund.

**SECTION 4.** There is appropriated to the Department of Education, for the biennium beginning July 1, 2023, out of the General Fund, the amount of \$64,206,661 for debt service on general obligation bonds.

**SECTION 5.** Notwithstanding any other law limiting expenditures, the amount of \$3,481,660 is established for the biennium beginning July 1, 2023, as the maximum limit for payment of expenses from lottery moneys allocated from the Administrative Services Economic Development Fund to the Department of Education for debt service.

**SECTION 6.** Notwithstanding any other law limiting expenditures, the following amounts are established for the biennium beginning July 1, 2023, as the maximum limits for payment of expenses, other than expenses described in sections 7 and 15 of this 2023 Act, from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds,

corporate activity tax funds and federal funds, collected or received by the Department of Education, for the following purposes:

- (1) Capital lending..... \$242,200,000
- (2) Operations..... \$ 50,080,239
- (3) Operations - American Rescue Plan Act..... \$ 263,351
- (4) Oregon School for the Deaf..... \$ 43,593,149

**SECTION 7.** Notwithstanding any other law limiting expenditures, the following amounts are established for the biennium beginning July 1, 2023, as the maximum limits for payment of grants-in-aid, program costs and purchased services from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds, corporate activity tax funds and federal funds, collected or received by the Department of Education for programs other than those specified in sections 8 and 15 of this 2023 Act, for the following purposes:

- (1) Youth development programs... \$ 6,597,025
- (2) Educator advancement programs... \$ 6,736,649
- (3) Educator advancement Council..... \$ 47,208,407
- (4) All other grants..... \$232,760,483

**SECTION 8.** Notwithstanding any other law limiting expenditures, the following amounts are established for the biennium beginning July 1, 2023, as the maximum limits for payment of expenses from federal funds, other than those described in sections 9 and 15 of this 2023 Act, collected or received by the Department of Education, for the following purposes:

- (1) Operations..... \$ 81,177,483
- (2) Oregon School for the Deaf..... \$ 302,443

**SECTION 9.** Notwithstanding any other law limiting expenditures, the following amounts are established for the biennium beginning July 1, 2023, as the maximum limits for payment of grants-in-aid, program costs and purchased services from federal funds, other than those described in sections 8 and 15 of this 2023 Act, received by the Department of Education, for the following purposes:

- (1) Youth development programs... \$ 1,047,097
- (2) K-12 COVID-19 related grants..... \$28,763,446
- (3) All other grants..... \$954,420,053

**SECTION 10.** Notwithstanding any other law limiting expenditures, the amount of \$64,857,193 is established for the biennium beginning July 1, 2023, as the maximum limit for payments of grants-in-aid, program costs and purchased services by the Department of Education from the Student Investment Account established under ORS 327.179.

**SECTION 11.** Notwithstanding any other law limiting expenditures, the amount of \$83,774,719 is established for the biennium beginning July 1, 2023, as the maximum limit for payments of grants-in-aid, program costs and purchased services by the Department of Education from the Early Learning Account established under ORS 327.200, for early intervention services and early childhood special education programs.

**SECTION 12.** Notwithstanding any other law limiting expenditures, the amount of \$47,413,189 is established for the biennium beginning July 1, 2023, as the maximum limit for payment of expenses by the Department of Education for a transfer of corporate activities tax funds from the Early Learning Account established under ORS 327.200 to the Department of Early Learning and Care.

**SECTION 13.** Notwithstanding any other law limiting expenditures, the following amounts are established for the biennium beginning July 1, 2023, as the maximum limits for payments of grants-in-aid, program costs and purchased services by the Department of Education from

Enrolled House Bill 5014 (HB 5014-A) Page 2

the Statewide Education Initiatives Account established under ORS 327.250, for the following purposes:

- (1) High School Graduation and College and Career Readiness Fund..... \$102,027,214
- (2) Reengagement program..... \$ 6,049,448
- (3) All other grants..... \$247,672,217

**SECTION 14.** Notwithstanding any other law limiting expenditures, the amount of \$42,463,779 is established for the biennium beginning July 1, 2023, as the maximum limit for payment of expenses by the Department of Education from the Statewide Education Initiatives Account established under ORS 327.250 for operations.

**SECTION 15.** For the biennium beginning July 1, 2023, the following expenditures by the Department of Education are not limited:

- (1) Moneys from the School Lunch Revolving Account, Education Training Revolving Account and Common School Fund; and
- (2) Expenditures for grants-in-aid and purchased services from federal funds received by the Department of Education from the United States Department of Agriculture.

**SECTION 16.** Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 6 (4), chapter 603, Oregon Laws 2021, for the biennium ending June 30, 2023, as the maximum limit for payment of grants-in-aid, program costs and purchased services from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds, corporate activity tax funds and federal funds, collected or received by the Department of Education for programs other than those specified in sections 8 and 15, chapter 603, Oregon Laws 2021, for all other grants, is increased by \$1,541,218, for expenditures from the School Stabilization Subaccount for Wildfire-impacted School Districts.

**SECTION 17.** This 2023 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2023 Act takes effect July 1, 2023.

Passed by House June 13, 2023  
Timothy G. Scherak, Chief Clerk of House

Received by Governor: \_\_\_\_\_  
Approved: \_\_\_\_\_  
Dana Rieffeld, Speaker of House  
Tim Knaack, Governor  
Filed in Office of Secretary of State: \_\_\_\_\_  
Rob Wagner, President of Senate  
Secretary of State

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# WORK SESSIONS

- For work session, there will be no agency or public testimony.
- The Department of Administrative Services Chief Financial Office will not make a recommendation, as that recommendation has already been made as part of the Governor's budget.
- The subcommittee will take action on Legislative Fiscal Office recommendations for the agency's primary budget measure, any associated fee measure, budget notes, and Key Performance Measures.
- LFO's recommendation memo and report from the Oregon Budget Information Tracking System (ORBITS) will be available on OLIS prior to the meeting.
- Proposed amendments for primary budget measures reflect the LFO recommendation.
- Subcommittee recommendations will advance to the Joint Committee on Ways and Means and then both chambers.

# Process and Procedures

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- JWM subcommittees follows the [rules](#) adopted by the Joint Committee on Ways and Means that are posted on OLIS.
- An affirmative vote of a majority of the appointed members of each chamber on the subcommittee is needed to advance a measure to the full committee.
- A subcommittee does not have the power to table or hold legislation or an agenda item but must report it back to the Full Committee for consideration.
- Before the subcommittee can take action on an amendment, it must be posted to OLIS four hours in advance of a work session.

# EXAMPLE OF AN LFO RECOMMENDATION MEMO (1 / 2)

LEGISLATIVE FISCAL OFFICE  
900 Court Street NE, Room H-178  
Salem, Oregon 97301  
(503) 986-1828

Amanda Beitel, Legislative Fiscal Officer  
Paul Siebert, Deputy Legislative Fiscal Officer  
John Terpening, Deputy Legislative Fiscal Officer



JOINT COMMITTEE ON  
WAYS AND MEANS

Senator Lieber, Senate Co-Chair  
Representative Sanchez, House Co-Chair

Senator Girod, Senate Co-Vice Chair  
Representative Gombert, House Co-Vice Chair  
Representative Smith, House Co-Vice Chair

To: General Government Subcommittee  
From: Kim To, Legislative Fiscal Office  
Date: April 14, 2025  
Subject: SB 5535 – Office of the Public Records Advocate  
Work Session Recommendations

Office of the Public Records Advocate				
Agency Totals				
FUND TYPE	2021-23 ACTUAL*	2023-25 LEGISLATIVELY APPROVED	2025-27 CURRENT SERVICE LEVEL	2025-27 LFO RECOMMENDED
Other Funds	703,469	1,000,967	1,172,941	1,172,941
<b>TOTAL FUNDS</b>	<b>703,469</b>	<b>1,000,967</b>	<b>1,172,941</b>	<b>1,172,941</b>
Positions	2	2	2	2
FTE	2.00	2.00	2.00	2.00

\*Data reflects actual expenditures within the Department of Administrative Services

The 2025-27 LFO recommended budget for the Office of the Public Records Advocate is two positions (2.00 FTE) and \$1,172,941 Other Funds. This is a \$171,974, or 17.2%, increase from 2023-25 legislatively approved budget of \$1,000,967 Other Funds. The increase reflects standard personal services growth and inflation for services and supplies expenditures. The 2025-27 LFO recommended budget is the current service level budget.

## Adjustments to Current Service Level

See attached "Work Session Presentation Report."

Note: Statewide adjustments and six-year capital construction expenditures are not included in these recommendations. Any needed adjustments will be made in end of session bills.

Accept LFO Recommendation

MOTION: I move the LFO recommendation to SB 5535. (vote)

SB 5535 - Work Session Recommendations

OR

Modify LFO Recommendation

MOTION: I move the LFO recommendation to SB 5535, with modifications. (vote)

### Performance Measures

The agency, the Department of Administrative Services Chief Financial Office, and the Legislative Fiscal Office worked together during the 2023-2024 interim to develop proposed Key Performance Measures for the Office of the Public Records Advocate.

See attached "Legislatively Proposed 2025-27 Key Performance Measures."

Accept LFO Recommendation

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

OR

Modify LFO Recommendation

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

### Amendment

LFO recommends a budget of \$1,172,941 Other Funds, and 2 positions (2.00 FTE), which is reflected in the – 1 amendment.

MOTION: I move adoption of the – 1 amendment to SB 5535. (vote)

### Final Subcommittee Action

LFO recommends that SB 5535, as amended by the – 1 amendment, be moved to the Ways and Means Full Committee.

MOTION: I move SB 5535, as amended, to the Full Committee with a do pass recommendation. (vote)

### Carriers

Full Committee: \_\_\_\_\_

House Floor: \_\_\_\_\_

Senate Floor: \_\_\_\_\_



# EXAMPLE OF AN ORBITS WORK SESSION REPORT

## Higher Education Coordinating Commission

## LFO Analyst Recommended

Agency Number: 52500

LFO102 - Work Session Presentation Report

Version: L - 01 - LFO Analyst Recommended

2023-25 Biennium

Cross Reference: 52500-000-00-00-00000

Higher Education Coordinating Commission

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
<b>2021-23 Agy. Leg. Adopted</b>	<b>2,491,512,552</b>	<b>122,327,240</b>	<b>656,127,668</b>	<b>130,597,522</b>	<b>154,855,686</b>	<b>20,536,302</b>	<b>3,575,956,970</b>	<b>152</b>	<b>143.36</b>
2021-23 Ebds, SS & Admin Act	187,108,819	17,546,266	156,120,793	419,411	-	4,008,154	365,203,443	28	17.51
Ways & Means Actions	-	-	-	-	-	-	-	-	-
<b>2021-23 Leg Approved Budget</b>	<b>2,678,621,371</b>	<b>139,873,506</b>	<b>812,248,461</b>	<b>131,016,933</b>	<b>154,855,686</b>	<b>24,544,456</b>	<b>3,941,160,413</b>	<b>180</b>	<b>160.87</b>
<b>2021-23 Leg Approved Budget (Base)</b>	<b>2,657,846,371</b>	<b>139,873,506</b>	<b>812,248,461</b>	<b>131,016,933</b>	<b>154,855,686</b>	<b>24,544,456</b>	<b>3,920,385,413</b>	<b>180</b>	<b>160.87</b>
Summary of Base Adjustments	64,825,433	1,011,281	(561,284,648)	(466,130)	39,992,034	(1)	(455,922,031)	(23)	(11.93)
<b>2023-25 Base Budget</b>	<b>2,722,671,804</b>	<b>140,884,787</b>	<b>250,963,813</b>	<b>130,550,803</b>	<b>194,847,720</b>	<b>24,544,455</b>	<b>3,464,463,382</b>	<b>157</b>	<b>148.94</b>
010: Non-PICS Pers Svc/Vacancy Factor	(14,319)	-	(80,007)	(150,461)	-	-	(244,787)	-	-
020: Phase In / Out Pgm & One-time Cost	(157,292,347)	(17,546,266)	(151,663,513)	-	-	-	(326,502,126)	-	-
030: Inflation & Price List Adjustments	174,536,268	2,591,125	3,010,529	5,365,097	-	-	185,503,019	-	-
<b>2023-25 Current Service Level</b>	<b>2,739,901,406</b>	<b>125,929,646</b>	<b>102,230,822</b>	<b>135,765,439</b>	<b>194,847,720</b>	<b>24,544,455</b>	<b>3,323,219,488</b>	<b>157</b>	<b>148.94</b>
<b>Adjusted 2023-25 Current Service Level</b>	<b>2,739,901,406</b>	<b>125,929,646</b>	<b>102,230,822</b>	<b>135,765,439</b>	<b>194,847,720</b>	<b>24,544,455</b>	<b>3,323,219,488</b>	<b>157</b>	<b>148.94</b>
<b>Total LFO Recommended Packages</b>	<b>132,479,257</b>	<b>77,936,831</b>	<b>136,062,709</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>346,478,797</b>	<b>32</b>	<b>31.91</b>
<b>2023-25 Legislative Actions</b>	<b>2,872,380,663</b>	<b>203,866,477</b>	<b>238,293,531</b>	<b>135,765,439</b>	<b>194,847,720</b>	<b>24,544,455</b>	<b>3,669,698,285</b>	<b>189</b>	<b>180.85</b>
Net change from 2021-23 Leg Approved Budget	193,759,292	63,992,971	(573,954,930)	4,748,506	39,992,034	(1)	(271,462,128)	9	19.98
Percent change from 2021-23 Leg Approved Budget	7.2%	45.8%	(70.7%)	3.6%	25.8%	0.0%	(6.9%)	5.0%	12.4%
Net change from 2023-25 Adj Current Service Level	132,479,257	77,936,831	136,062,709	-	-	-	346,478,797	32	31.91
Percent change from 2023-25 Adj Current Service Level	4.8%	61.9%	133.1%	0.0%	0.0%	0.0%	10.4%	20.4%	21.4%

# EXAMPLE OF AN AMENDMENT TO A BUDGET MEASURE

HB 5033-2  
(LC 9033)  
5/12/23 (DFY/ps)

Requested by JOINT COMMITTEE ON WAYS AND MEANS

## PROPOSED AMENDMENTS TO HOUSE BILL 5033

1 On page 1 of the printed bill, delete lines 5 through 28 and delete page  
2 2 and insert:

3 **“SECTION 1. Notwithstanding any other law limiting expenditures,**  
4 **the following amounts are established for the biennium beginning July**  
5 **1, 2023, as the maximum limits for payment of expenses from fees,**  
6 **moneys or other revenues, including Miscellaneous Receipts but ex-**  
7 **cluding lottery funds and federal funds, collected or received by the**  
8 **Public Employees Retirement System, for the following purposes:**

9 (1) Central Administration

10 Division ..... \$ 19,740,974

11 (2) Financial and Administrative

12 Services Division..... \$ 23,900,400

13 (3) Information Services Division .. \$ 34,216,261

14 (4) Operations Division..... \$ 48,877,505

15 (5) Compliance, Audit and Risk

16 Division ..... \$ 10,470,390

17 (6) Core Retirement System:

18 (a) Implementation of chapter 355,

19 Oregon Laws 2019:

20 (A) Project management and

21 implementation ..... \$ 1,876,800

# Budget Starting Point

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- The starting point for the LFO recommendations is the 2025-27 current service level.
- During work session, LFO will review any change, positive or negative, to the current service level as a discrete policy option package:
  - 070 package – revenue shortfall (i.e., eliminates budget authority unsupported by a revenue source).
  - 08X series packages – reflects ongoing interim activities of the Emergency Board/Special Sessions/Legislature.
  - 09X series packages – CFO packages added in the Governor's budget (e.g., Pkg. 099 Microsoft 365 Consolidation).
  - 100+ series packages – agency requested and recommended by LFO (can be modified as part of recommendation).
  - 80X series packages – LFO added packages, including agency-specific adjustments or statewide adjustments.
  - Assessment and rate changes will come at the end of session.
- There can be revenue-only policy packages or packages that adjust beginning balance for Other Funds.
- A primary budget measure can, but rarely has, a revenue impact.

# Key Performance Measures (KPM) Recommendations

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The subcommittee will take action on the Legislative Fiscal Office recommendations for the agency's:

- Key Performance Measures, including any recommended changes.
- Key Performance Measure targets for the years 2026 and 2027.
- Possible instructions to the agency.

# EXAMPLE KPM REPORT

## Legislatively Approved 2023 - 2025 Key Performance Measures

Published: 6/6/2023 3:20:33 PM

Agency: Higher Education Coordinating Commission

### Mission Statement:

The Higher Education Coordinating Commission seeks to: Broaden pathways to the goal of educational success beyond high school by achieving at least 40% of adult Oregonians earning a bachelor's degree or higher and at least 40% of adult Oregonians earning an associate's degree or post-secondary credential as their highest level of educational attainment by 2025 (see ORS 351.009 Mission of Education Beyond High School) Make the pathways accessible, affordable and supportive for students Steer the higher education enterprise Cheer the promotion of college completion and career readiness

Legislatively Approved KPMs	Metrics	Agency Request	Last Reported Result	Target 2024	Target 2025
1. Oregon High School Graduates Attending College - Percentage of Oregon students enrolled in college within 16 months of their 4-year high school cohort graduation date.		Approved	61.80%	66%	66%
2. Racial/Ethnic Differences Among Oregon High School Graduates Attending College - Percentage of Oregon students enrolled in college within 16 months of their 4-year high school cohort graduation date, disaggregated by race/ethnicity	American Indian or Alaskan Native	Approved	48.50%	66%	66%
	b) Asian American		79.40%	84%	84%
	c) Black or African American		61.20%	66%	66%
	d) Hispanic or Latina/-o		55.10%	66%	66%
	e) Native Hawaiian or Pacific Islander		51.40%	66%	66%
	f) White		62.80%	66%	66%
3. College Credits Earned by K-12 Students - Amount of postsecondary credit per graduate awarded to K-12 students.		Approved	7.23	11.50	11.50
4. Oregon Educational Attainment - Percent of young Oregon adults with post secondary degree or certificate		Approved	54.40%	59%	59%
5. Community College Completion and Transfer Rate - Percentage of community college students who complete an associate degree or certificate or who transfer to the university system within three years.		Approved	51%	52%	52%
6. Racial/Ethnic Differences for Community College Completion and Transfer Rate - Percentage of community college students who complete an associate degree or certificate or who transfer to university system within three years by race/ethnicity.	American Indian or Alaska Native	Approved	44.70%	50%	50%
	b) Asian American		56.90%	57%	57%
	c) Black or African American		43.40%	50%	50%
	d) Hispanic or Latina/-o		46.40%	50%	50%
	e) Native Hawaiian or Pacific Islander		43.10%	50%	50%
	f) White		52.80%	54%	54%
7. Public University Graduation Rate - Percentage of public university college students who complete a bachelor's degree within 6 years.		Approved	67.70%	68%	68%
8. Racial/Ethnic Differences for Public University Graduation Rate - Percentage of public university students who complete a bachelor's degree within 6 years, by race/ethnicity.	American Indian or Alaska Native	Approved	45.20%	65%	65%
	b) Asian American		78.40%	79%	79%

HB 5025 A

## BUDGET NOTES

- Formal directives included in a budget report to express legislative intent for a particular budget issue.
- Directs an agency to take administrative or managerial action relating to the agency's execution of its biennial budget.
- Budget notes are neither required nor necessary for every Ways and Means measure.
- Must be approved for inclusion by the Co-Chairs of the Full Ways and Means Committee.
- Should be limited in scope.
- Not intended to circumvent, supplant, or replace other substantive or policy measures or law.
- Do not have the force of law.
- Typically expires at the end of the biennium.

# BUDGET NOTES

## Examples of budget notes:

### **Budget Note:**

The Department of the State Fire Marshal is directed to work collaboratively with the Department of Administrative Services Chief Financial Office and Legislative Fiscal Office to develop a more detailed agency appropriation structure for its biennial budget bill. At a minimum, this structure shall detail the expenditures derived from fee-based revenue versus expenditures derived from General Fund deposited in a fund. This new budget structure shall be recommended and prepared prior to the 2025 legislative session.

### **Budget Note:**

The Department of Education's Early Learning Division shall report to the Interim Committee on Joint Ways and Means on the ongoing cashflow for the Child Care Development Fund (CCDF). The report must include information regarding actual and estimated expenditures and what the expenditures are for; a projection of the cashflow of the CCDF for 2021-23 and 2023-25 including ending balances; a plan for how any undesignated expenditures will be used; and if there are potential cashflow issues in the future, alternatives to close any gaps between estimated expenditures and CCDF resources.

# Budget Reports

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- Accompany appropriation bills or policy bills with appropriation.
- Satisfy chamber rules by serving as both a Staff Measure Summary (SMS) and Fiscal Impact Statement (FIS) and will be prepared after Full Committee.
- Provide narrative to support Legislative intent of a budget measure and explains the approved actions, but do not have the force of law.
- Include authorization for positions and full-time equivalents.
- Include any budget notes or less formal instruction.
- Include any request to unscheduled funds, which is the administrative withholding of allotment authority for a portion of an agency's legally authorized budget until pre-defined criteria is met.
- Include Key Performance Measure report as an addendum.



# EXAMPLE BUDGET REPORT (1 / 3)

## SB 5502 A BUDGET REPORT and MEASURE SUMMARY

Carrier: Rep. Chaichi

### Joint Committee On Ways and Means

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**Action Date:** 05/31/23

**Action:** Do Pass the A-Eng bill.

**House Vote**

**Yeas:** 9 - Breese-Iverson, Evans, Gomberg, Holvey, McLain, Pham K, Sanchez, Smith G, Valderrama

**Nays:** 3 - Cate, Lewis, Reschke

**Senate Vote**

**Yeas:** 10 - Anderson, Campos, Dembrow, Findley, Frederick, Gelser Blouin, Hansell, Knopp, Sollman, Steiner

**Nays:** 1 - Girod

**Prepared By:** Dustin Ball, Department of Administrative Services

**Reviewed By:** Kim To, Legislative Fiscal Office

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Department of Administrative Services  
2023-25

This summary has not been adopted or officially endorsed by action of the committee.

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# EXAMPLE BUDGET REPORT (2 / 3)

## **Budget Summary\***

	2021-23 Legislatively Approved Budget <sup>(1)</sup>	2023-25 Current Service Level	2023-25 Committee Recommendation	Committee Change from 2021-23 Leg. Approved	
				\$ Change	% Change
General Fund	\$ 2,394,072,265	\$ 2,412,057,956	\$ 2,544,537,213	\$ 150,464,948	6.3%
General Fund Debt Service	\$ 263,774,106	\$ 327,843,450	\$ 327,843,450	\$ 64,069,344	24.3%
Lottery Funds	\$ 95,754,317	\$ 80,799,176	\$ 158,736,007	\$ 62,981,690	65.8%
Lottery Funds Debt Service	\$ 44,119,189	\$ 45,130,470	\$ 45,130,470	\$ 1,011,281	2.3%
Other Funds Limited	\$ 240,679,996	\$ 90,944,642	\$ 227,007,351	\$ (13,672,645)	(5.7%)
Other Funds Limited - Debt Service	\$ 39,166,371	\$ 11,286,180	\$ 11,286,180	\$ (27,880,191)	(71.2%)
Other Funds Nonlimited	\$ 206,000	\$ 206,000	\$ 206,000	\$ -	0.0%
Other Funds Nonlimited- Debt Service	\$ 154,649,686	\$ 194,641,720	\$ 194,641,720	\$ 39,992,034	25.9%
Federal Funds Limited	\$ 131,016,933	\$ 135,765,439	\$ 135,765,439	\$ 4,748,506	3.6%
Federal Funds NonLimited	\$ 20,536,302	\$ 20,536,302	\$ 20,536,302	\$ -	0.0%
Federal Funds Nonlimited - Debt Service	\$ 4,008,154	\$ 4,008,153	\$ 4,008,153	\$ (1)	(0.0%)
Total	\$ 3,387,983,319	\$ 3,323,219,488	\$ 3,669,698,285	\$ 281,714,966	8.3%

## **Position Summary**

Authorized Positions	180	157	189	9
Full-time Equivalent (FTE) positions	160.87	148.94	180.85	19.98

<sup>(1)</sup> Includes adjustments through January 2023

\* Excludes Capital Construction expenditures

## **Emergency Board**

	2021-23 Legislatively Approved Budget <sup>(1)</sup>	2023-25 Current Service Level	2023-25 Committee Recommendation	Committee Change from 2021-23 Leg. Approved	
				\$ Change	% Change
General Fund	\$ -	\$ -	\$ 18,735,518	\$ 18,735,518	100.0%
Total	\$ -	\$ -	\$ 18,735,518	\$ 18,735,518	100.0%

# EXAMPLE BUDGET REPORT (3 / 3)

## DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

Higher Education Coordinating Commission  
Adam Crawford -- (971) 707-8106

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
2021-23 Legislatively Approved Budget at Jan 2023 *	\$ 2,678,621,371	\$ 139,873,506	\$ 279,846,367	\$ 154,855,686	\$ 131,016,933	\$ 24,544,456	\$ 3,408,758,319	180	160.87
2023-25 Current Service Level (CSL)*	\$ 2,739,901,406	\$ 125,929,646	\$ 102,230,822	\$ 194,847,720	\$ 135,765,439	\$ 24,544,455	\$ 3,323,219,488	157	148.94
<b>SUBCOMMITTEE ADJUSTMENTS (from CSL)</b>									
<b>SCR 200 - Director's Office</b>									
Package 90: Analyst Adjustment									
Personal Services	\$ (224,388)	\$ -	\$ -	\$ -	\$ -	\$ -	(224,388)	0	0.00
Services and Supplies	\$ (19,548)	\$ -	\$ -	\$ -	\$ -	\$ -	(19,548)		
Package 406: Future Ready Oregon									
Personal Services	\$ 966,246	\$ -	\$ -	\$ -	\$ -	\$ -	966,246	4	4.00
<b>SCR 201 - Central Operations</b>									
Package 90: Analyst Adjustment									
Personal Services	\$ (399,351)	\$ -	\$ -	\$ -	\$ -	\$ -	(399,351)	0	0.00
Services and Supplies	\$ (139,666)	\$ -	\$ -	\$ -	\$ -	\$ -	(139,666)		
Package 401: Student & Jobseeker Enterprise IT System									
Personal Services	\$ 247,985	\$ -	\$ 599,843	\$ -	\$ -	\$ -	847,828	3	2.88
Services and Supplies	\$ 30,834	\$ -	\$ (5,000,000)	\$ -	\$ -	\$ -	(4,969,166)		
Capital Outlay	\$ -	\$ -	\$ 8,650,157	\$ -	\$ -	\$ -	8,650,157		
Package 406: Future Ready Oregon									
Personal Services	\$ 2,263,457	\$ -	\$ -	\$ -	\$ -	\$ -	2,263,457	9	9.00
<b>SCR 202 - Research and Data</b>									
Package 90: Analyst Adjustment									
Personal Services	\$ (233,280)	\$ -	\$ -	\$ -	\$ -	\$ -	(233,280)	(1)	(0.25)
Services and Supplies	\$ (50,911)	\$ -	\$ -	\$ -	\$ -	\$ -	(50,911)		
Package 406: Future Ready Oregon									
Personal Services	\$ 596,799	\$ -	\$ 250,210	\$ -	\$ -	\$ -	847,009	3	3.00
Services and Supplies	\$ -	\$ -	\$ 26,926	\$ -	\$ -	\$ -	26,926		
<b>SCR 203 - Academic Policy and Authorization</b>									
Package 90: Analyst Adjustment									
Personal Services	\$ (99,139)	\$ -	\$ -	\$ -	\$ -	\$ -	(99,139)	0	0.00
Services and Supplies	\$ (10,658)	\$ -	\$ -	\$ -	\$ -	\$ -	(10,658)		
<b>SCR 204 - Post-Secondary Finance and Capital</b>									
Package 90: Analyst Adjustment									
Personal Services	\$ (66,569)	\$ -	\$ -	\$ -	\$ -	\$ -	(66,569)	0	0.00
Services and Supplies	\$ (11,201)	\$ -	\$ -	\$ -	\$ -	\$ -	(11,201)		

# Legislatively Adopted Budget

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## **Agency Primary Budget Bill**

+ Omnibus Budget Reconciliation (Emergency Fund) Bill

+ Capital Construction Bill

+ Policy Bills (*with an appropriation*)

**= Legislatively Adopted Budget (LAB)**

# Legislatively Approved Budget

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## **Legislatively Adopted Budget (LAB)**

- + February Session actions
  - + Emergency Board actions
  - + Special Session actions, *if convened*
  - + Select executive branch administrative actions authorized by law
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**= Legislatively Approved Budget (LAB)**

# EDUCATION SUBCOMMITTEE

11 Appropriation Bills  
2 Fee Bills

## Education Program Area

- **SB 5514** – Department of Early Learning and Care
- **HB 5037** – Teacher Standards and Practices Commission
- **HB 5042** – *Fee Bill* - Teacher Standards and Practices Commission
- **SB 5515** – Department of Education
- **SB 5516** – State School Fund
- **SB 5525** – Higher Education Coordinating Commission

## Licensing Boards

- **HB 5028** – Board of Pharmacy
- **SB 5524** – Health Related Licensing Boards
- **SB 5532** – Mental Health Regulatory Agencies
- **SB 5507** – Board of Chiropractic Examiners
- **SB 5544** – *Fee Bill* – Board of Chiropractic Examiners
- **SB 5512** – Board of Dentistry
- **HB 5018** – Board of Licensed Social Workers

# LFO Contacts

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*Subcommittee Coordinator*

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- Department of Early Learning and Care
- Teacher Standards and Practices Commission
- Department of Education
- State School Fund

## Kim To

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- Higher Education Coordinating Commission (HECC)
- Community Colleges
- Public Universities
- Oregon Health and Science University (OHSU)
- Oregon Opportunity Grant

## Haylee Morse-Miller

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- Board of Pharmacy (BOP)
- Health-Related Licensing Boards (HRLB): Mortuary and Cemetery, Naturopathic, Medical Imaging, Occupational Therapy, Speech Language Pathology and Audiology, Veterinary Medical

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- Mental Health Regulator Agencies: Board of Counselors and Therapists, Board of Psychology

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- Board of Chiropractic Examiners (BCE)
- Board of Dentistry

# Questions?

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