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JOINT COMMITTEE ON WAYS AND MEANS

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

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

To: Human Services Subcommittee
From: Gregory Jolivet, Legislative Fiscal Office
Date: May 28, 2025
Subject: HB 5020 – Long Term Care Ombudsman
Work Session Recommendations

Long Term Care Ombudsman				
Agency Totals				
FUND TYPE	2021-23 ACTUAL	2023-25 LEGISLATIVELY APPROVED	2025-27 CURRENT SERVICE LEVEL	2025-27 LFO RECOMMENDED
General Fund	10,603,753	13,833,416	14,294,236	16,187,279
Other Funds	888,985	1,558,347	1,345,139	1,345,139
TOTAL FUNDS	11,492,738	15,391,763	15,639,375	17,532,418
Positions	36	41	36	41
FTE	35.50	38.00	35.50	40.50

The Office of the Long Term Care Ombudsman (LTCO) aims to protect individual rights, promote independence, and ensure quality of life for Oregonians living in long-term care and residential care facilities and for Oregonians with decisional limitations. The State Long Term Care Ombudsman serves as the agency director. The budget supports three programs: the Long Term Care Ombudsman, the Residential Facilities Ombudsman, and the Oregon Public Guardian.

LFO recommends a total funds budget of \$17,532,418 and 41 positions (40.50 FTE), which is a 13.9% increase over the 2023-25 legislatively approved budget and a 12.1% increase over the 2025-27 current service level. There are two notable adjustments to current service level budget: a decrease of \$210,000 General Fund related to rent savings, and an increase of \$2,103,043 to support five permanent full-time positions in the Oregon Public Guardian (OPG) program.

The OPG positions --four deputy public guardians and one manager-- were first authorized as limited duration positions in the 2024 legislative session to focus on the hospital discharge population. At the time, OPG estimated the new positions would enable the program to serve up to 80 additional individuals, increasing the total caseload capacity to approximately 250 individuals.

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 HB 5020. *(vote)*

OR

Modify LFO Recommendation

MOTION: I move the LFO recommendation to HB 5020, with modifications. *(vote)*

Performance Measures

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 \$16,187,279 General Fund, \$1,345,139 Other Funds, and 41 positions (40.50 FTE), which is reflected in the –1 amendment.

MOTION: I move adoption of the –1 amendment to HB 5020. *(vote)*

Final Subcommittee Action

LFO recommends that HB 5020, as amended by the –1 amendment, be moved to the Ways and Means Full Committee.

MOTION: I move HB 5020, as amended, to the Full Committee with a do pass recommendation. *(vote)*

Carriers

Full Committee: _____

House Floor: _____

Senate Floor: _____

Long Term Care Ombudsman**LFO Analyst Recommended****Agency Number: 11400****LFO102 - Work Session Presentation Report
2025-27 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)
2023-25 Agy. Leg. Adopted	12,066,961	-	1,509,546	-	-	-	13,576,507	36	35.50
2023-25 Ebds, SS & Admin Act	1,766,455	-	48,801	-	-	-	1,815,256	5	2.50
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2023-25 Leg Approved Budget	13,833,416	-	1,558,347	-	-	-	15,391,763	41	38.00
2023-25 Leg Approved Budget (Base)	13,833,416	-	1,558,347	-	-	-	15,391,763	41	38.00
Summary of Base Adjustments	511,917	-	77,670	-	-	-	589,587	(5)	(2.50)
2025-27 Base Budget	14,345,333	-	1,636,017	-	-	-	15,981,350	36	35.50
010: Non-PICS Pers Svc/Vacancy Factor	(70,904)	-	(1,108)	-	-	-	(72,012)	-	-
020: Phase In / Out Pgm & One-time Cost	(238,631)	-	(306,000)	-	-	-	(544,631)	-	-
030: Inflation & Price List Adjustments	258,438	-	16,230	-	-	-	274,668	-	-
2025-27 Current Service Level	14,294,236	-	1,345,139	-	-	-	15,639,375	36	35.50
Adjusted 2025-27 Current Service Level	14,294,236	-	1,345,139	-	-	-	15,639,375	36	35.50
Total LFO Recommended Packages	1,893,043	-	-	-	-	-	1,893,043	5	5.00
2025-27 Legislative Actions	16,187,279	-	1,345,139	-	-	-	17,532,418	41	40.50
Net change from 2023-25 Leg Approved Budget	2,353,863	-	(213,208)	-	-	-	2,140,655	-	2.50
Percent change from 2023-25 Leg Approved Budget	17.0%	0.0%	(13.7%)	0.0%	0.0%	0.0%	13.9%	0.0%	6.6%
Net change from 2025-27 Adj Current Service Level	1,893,043	-	-	-	-	-	1,893,043	5	5.00
Percent change from 2025-27 Adj Current Service Level	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	12.1%	13.9%	14.1%

Long Term Care Ombudsman

LFO Analyst Recommended

Agency Number: 11400

LFO102 - Work Session Presentation Report
2025-27 Biennium

Version: L - 01 - LFO Analyst Recommended

Cross Reference: 11400-010-00-00-00000

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)
2023-25 Agy. Leg. Adopted	7,565,345	-	1,202,917	-	-	-	8,768,262	24	23.50
2023-25 Ebds, SS & Admin Act	546,527	-	48,801	-	-	-	595,328	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2023-25 Leg Approved Budget	8,111,872	-	1,251,718	-	-	-	9,363,590	24	23.50
2023-25 Leg Approved Budget (Base)	8,111,872	-	1,251,718	-	-	-	9,363,590	24	23.50
Summary of Base Adjustments	608,153	-	77,670	-	-	-	685,823	-	-
2025-27 Base Budget	8,720,025	-	1,329,388	-	-	-	10,049,413	24	23.50
010: Non-PICS Pers Svc/Vacancy Factor	(36,522)	-	(9,081)	-	-	-	(45,603)	-	-
020: Phase In / Out Pgm & One-time Cost	-	-	(306,000)	-	-	-	(306,000)	-	-
030: Inflation & Price List Adjustments	104,568	-	10,574	-	-	-	115,142	-	-
2025-27 Current Service Level	8,788,071	-	1,024,881	-	-	-	9,812,952	24	23.50
Adjusted 2025-27 Current Service Level	8,788,071	-	1,024,881	-	-	-	9,812,952	24	23.50
Total LFO Recommended Packages	(210,000)	-	-	-	-	-	(210,000)	-	-
2025-27 Legislative Actions	8,578,071	-	1,024,881	-	-	-	9,602,952	24	23.50
Net change from 2023-25 Leg Approved Budget	466,199	-	(226,837)	-	-	-	239,362	-	-
Percent change from 2023-25 Leg Approved Budget	5.8%	0.0%	(18.1%)	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%
Net change from 2025-27 Adj Current Service Level	(210,000)	-	-	-	-	-	(210,000)	-	-
Percent change from 2025-27 Adj Current Service Level	(2.4%)	0.0%	0.0%	0.0%	0.0%	0.0%	(2.1%)	0.0%	0.0%

Long Term Care Ombudsman**LFO Analyst Recommended****Agency Number: 11400****LFO102 - Work Session Presentation Report
2025-27 Biennium****Version: L - 01 - LFO Analyst Recommended****Cross Reference: 11400-010-00-00-00000****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)
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Package 090 Analyst AdjustmentsPackage Description This package recognizes rent savings.LFO Recommendation The Legislative Fiscal Office recommends approval.

LFO Recommended	(210,000)	-	-	-	-	-	(210,000)	-	-
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LFO102 - Work Session Presentation Report
2025-27 Biennium

Version: L - 01 - LFO Analyst Recommended

Cross Reference: 11400-020-00-00-00000

Public Guardian and Conservator Program

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2023-25 Agy. Leg. Adopted	4,501,616	-	306,629	-	-	-	4,808,245	12	12.00
2023-25 Ebds, SS & Admin Act	1,219,928	-	-	-	-	-	1,219,928	5	2.50
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2023-25 Leg Approved Budget	5,721,544	-	306,629	-	-	-	6,028,173	17	14.50
2023-25 Leg Approved Budget (Base)	5,721,544	-	306,629	-	-	-	6,028,173	17	14.50
Summary of Base Adjustments	(96,236)	-	-	-	-	-	(96,236)	(5)	(2.50)
2025-27 Base Budget	5,625,308	-	306,629	-	-	-	5,931,937	12	12.00
010: Non-PICS Pers Svc/Vacancy Factor	(34,382)	-	7,973	-	-	-	(26,409)	-	-
020: Phase In / Out Pgm & One-time Cost	(238,631)	-	-	-	-	-	(238,631)	-	-
030: Inflation & Price List Adjustments	153,870	-	5,656	-	-	-	159,526	-	-
2025-27 Current Service Level	5,506,165	-	320,258	-	-	-	5,826,423	12	12.00
Adjusted 2025-27 Current Service Level	5,506,165	-	320,258	-	-	-	5,826,423	12	12.00
Total LFO Recommended Packages	2,103,043	-	-	-	-	-	2,103,043	5	5.00
2025-27 Legislative Actions	7,609,208	-	320,258	-	-	-	7,929,466	17	17.00
Net change from 2023-25 Leg Approved Budget	1,887,664	-	13,629	-	-	-	1,901,293	-	2.50
Percent change from 2023-25 Leg Approved Budget	33.0%	0.0%	4.4%	0.0%	0.0%	0.0%	31.5%	0.0%	17.2%
Net change from 2025-27 Adj Current Service Level	2,103,043	-	-	-	-	-	2,103,043	5	5.00
Percent change from 2025-27 Adj Current Service Level	38.2%	0.0%	0.0%	0.0%	0.0%	0.0%	36.1%	41.7%	41.7%

	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 OPG Short Session Expansion Positions

Package Description This package makes permanent five limited duration positions that were authorized during the 2024 legislative session. Includes four deputy guardian positions and one manager position to oversee the new Oregon Public Guardianship Intake Unit.

LFO Recommendation The Legislative Fiscal Office recommends approval.

LFO Recommended	2,103,043	-	-	-	-	-	2,103,043	5	5.00
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Legislatively Proposed 2025 - 2027 Key Performance Measures

Published: 5/20/2025 11:32:44 AM

Agency: Long Term Care Ombudsman

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 Proposed KPMs	Metrics	Agency Request	Last Reported Result	Target 2026	Target 2027
2. Average initial response time, measured in business days, to LTCO non-referred cases.		Approved	1	1	1
3. Average time, measured in business days, to close LTCO non-referred cases.		Approved	29	17	17
4. Percent of NF and ALF/RCF facilities to which a Long-Term Care Certified Ombudsman is assigned.		Approved	33%	50%	50%
5. Long-Term Care Certified Ombudsman hours.		Approved	13,473	20,000	20,000
8. 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		80%	90%	90%
	Expertise		82%	90%	90%
	Overall		80%	90%	90%
	Timeliness		83%	90%	90%
	Availability of Information		75%	90%	90%
9. Comparison of the number of new crimes charged for all OPG protected persons in the year prior to guardianship with the number of new charges in the reporting year. Target: 99% reduction in criminal charges .		Proposed New		99%	99%
10. Comparison of the number of days all OPG protected persons were admitted inpatient to a hospital in the 1 year prior to OPG appointment with the number of days inpatient in the last reporting year. Target: 30% reduction in hospital days.		Proposed New		30%	30%
11. Comparison of the number of ER visits in the year prior to guardianship for all OPG protected persons with the number of ER visits in the reporting year. Target: 99% reduction in ER visits.		Proposed New		99%	99%
12. Percent of Adult Foster Homes receiving a visit by a staff member or volunteer of the LTCO program annually.		Proposed New		25%	25%
13. Average time first action taken in response to request for assistance from the RFO program. Target: 90% of requests for assistance will be responded to within 2 business days, excluding weekends and holidays.		Proposed New		90%	90%
14. Percentage of RFO homes and facilities visited annually.		Proposed New		30%	30%
1. Percentage of non-referred complaints to LTCO where action is needed that are partially or fully resolved.		Proposed Delete	87%		
6. Number of hospitalizations, ER visits, arrests, or psychiatric holds of OPGC clients during the reporting period.		Proposed Delete	1.36		

Legislatively Proposed KPMs	Metrics	Agency Request	Last Reported Result	Target 2026	Target 2027
7. Number of referrals diverted away from OPGC by finding less restrictive alternatives.		Proposed Delete	53%		

LFO Recommendation:

The Legislative Fiscal Office recommends approval of the proposed 2025-27 Key Performance Measures and targets. The proposed new key performance measures (KPM) 9,10, and 11 improve and expand on KPM 6 which is proposed for deletion. Proposed new KPMs 12, 13, and 14 focus on areas of legislative interest that to date have not been reported, including annual LTCO visits to adult foster homes, and annual Residential Facility Ombudsman visits to homes and facilities licensed to serve individuals with developmental disabilities and/or mental health conditions.

SubCommittee Action: