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JOINT COMMITTEE ON WAYS AND MEANS

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REP. PETER BUCKLEY, CO-CHAIR

SEN. BETSY JOHNSON, VICE-CHAIR
REP. NANCY NATHANSON, VICE-CHAIR

To: Agency Heads and Agency Budget Managers
From: Ken Rocco, Legislative Fiscal Office
Date: January 21, 2009
Subject: Agency Presentations to Joint Committee on Ways and Means

A. General Principles and Guidelines

For the 2009 session, agency budget hearings will be scheduled to be completed by May 1st. To meet this time frame, agency budget hearings will put less emphasis on basic program information and more emphasis on budget details and issues than in the past.

Guidelines for agency presentation materials are outlined on the next page. Agencies are to follow these general guidelines, but may tailor their written material and presentations as directed by their Subcommittee's co-chairs and their Legislative Fiscal Office (LFO) analyst. Agency presentation materials are expected to supplement, not replace, the completed Governor's Recommended Budget document.

Subcommittee members will be expected to review basic information prior to subcommittee meetings so that Subcommittees can spend more hearing time in discussion and development of budget options. To allow time for this review, all written presentation materials must be submitted to the LFO analyst no later than four full days before an agency's first scheduled hearing day. LFO will need 14 copies of presentation materials. The LFO analyst will distribute materials to the Subcommittee members no later than three full days before an agency's hearings begin.

B. Full Committee Presentations (January 21 through January 30)

The Department of Administrative Services Budget and Management Division (BAM) will present program area overviews to the full Ways and Means Committee. LFO will provide information on Key Performance Measures and the Oregon Benchmarks. The full committee will also hear a discussion of occupational and workforce trends.

C. Subcommittee Presentations (February 2 through May 1)

LFO staff will orient Subcommittees to general operational issues on Monday, February 2nd. Agency presentations to Subcommittees will begin on Tuesday, February 3rd. Agencies are to follow the general outline below for their oral presentations and written materials. For larger agencies, the BAM overview, agency performance overview, and the program priorities review should be presented for the entire agency. Each major division or program area, as agreed to by LFO and BAM, should then present its detailed discussion of budget, policy, and program issues.

2009 Joint Committee on Ways and Means

Agency Presentation Guidelines

BAM Overview (15 minutes)

- BAM overview of agency and 2009-11 Governor's Recommended Budget (GRB)

Agency Performance Overview

- Provide an overview of agency performance results for the 2007-09 biennium with appropriate references to agency Key Performance Measures, internal measures, and other data that quantifies and effectively illustrates performance results. This overview should focus on key agency performance results and should include both accomplishments and challenges for the future. Also make references to the agency's Management Report and the most current Annual Performance Progress Report (APPR).

Program Priorities

- Review of agency's program prioritization lists

2009-11 Essential Budget Level

- Review and discussion of Essential Budget Level (EBL) calculation
- Summary of 2009-11 Budget Crosswalk at agency and SCR level (add explanatory detail as needed)

2009-11 GRB

- Discussion of GRB issues, including proposed reductions
- List of 2009 legislation proposed by the Governor on the agency's behalf

Agency Policy and Program Alternatives

- Review additional or alternative reduction options (up to 20% General Fund/Lottery Funds, selected Other Funds)
- Discussion of other potential policy or program actions, including continuous improvement options

Appendices

Include in written materials, and reference in presentation if appropriate:

- Program detail, including description of program services, clients, service delivery, revenue sources, internal performance measures, and the agency's KPM Management Report
- Agency reports including any required by law or requested by the Legislature, audit reports and responses, prior budget notes and responses thereto
- Any other information that the agency believes will be useful to the Subcommittee