



MONTANA LEGISLATIVE BRANCH

Legislative Fiscal Division

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Legislative Fiscal Analyst
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DATE: May 22, 2008

TO: Legislative Finance Committee Members

FROM: Kris Wilkinson, Fiscal Analyst II

RE: Agency Budget Templates for Presentations to the Joint Appropriations Subcommittees

During the March 2008 Legislative Finance Committee (LFC) the committee was made aware of potential revisions to the agency template used in presentations before the Joint Appropriation Subcommittees. The purpose of the agency templates is to provide standardized agency information to the various subcommittees. The proposed revised agency template is attached to this memorandum.

In order to streamline the template and reduce the amount of information the state agencies were required to provide the following were eliminated from the agency budget templates:

- Spending and funding charts and graphs
- 2009 Biennium new program implementation and program expansion
- 2011 Biennium budget graphs
- What the division does
- Statutory authority for the division
- How services are provided

The LFD will provide agency profiles to the subcommittees which provide the majority of this information at the agency level.

During the 2009 Interim, the LFC has focused on performance measurement and attainment of program specific goals outlined in the agency templates from the previous legislative session. The 2007 Legislature was the first time agencies were required to submit information on their program goals and how they would measure attainment of the goals to the legislative subcommittees considering their appropriations. While the submission of program goals and objectives is part of the state budget, they were not previously considered as part of the legislative appropriation process.

The revisions to the templates continue the work of the LFC in relation to performance measurement and presentation of program goals and measurable objectives (performance measures) into the next legislative session. The summarized information includes the LFC performance measurement information and its current status as part of the information provided

to each subcommittee. This familiarizes the subcommittee with the performance measurement process, the goals considered by LFC workgroups during the interim, and areas of success or concern.

Further, the template allows each program to present those program goals and performance measurements (measurable objectives) that the program considers a priority in the next biennium. This revision allows the program to present their viewpoint on the program goals which are critical and allows for legislative discussion of the measurements used to determine attainment of the goals. The template also includes summary information on major performance challenges facing the program which may affect the attainment of the goals and performance measurements. The summary information will provide an overview of this information to the subcommittee in a brief, concise 2 page document.

A narrative is also included allowing the agency to expand on the information provided in the summary and providing updates on the status of FTE approved during the previous session, corrective action plans required as a result of legislative or federal program audits, and information on significant policy and budget issues.

The Legislative Finance Committee makes global recommendations to the joint meeting of the House Appropriations Committee and Senate Finance and Claims. The LFC may wish to consider including a recommendation that the Joint Appropriation Subcommittees require state agencies to submit and discuss agency budget templates as a part of their budget presentation. The LFC may wish to consider exempting support services such as centralized service programs from the requirement as their goals are to support the other programs.

- Not Met
 - 3. Goal Description
 - a.. Performance Measurement
 - Met
 - In progress
 - Not Met
 - b. Performance Measurement
 - Met
 - In progress
 - Not Met
 - c. Performance Measurement
 - Met
 - In progress
 - Not Met

2011 BIENNIAL BUDGET INCREASE REQUEST (See LFD Budget Analysis for detailed requests)

- General Fund
- State Special Revenue
- Federal
- Proprietary

During the 2009 biennium legislation other than the appropriations act, House/Senate Bill ____ increased the division/program base by \$_____ of ___ fund(s) over the biennium. This funding has not previously been considered as part of the general appropriations for the division/program.

2011 BIENNIAL PRIORITY GOALS AND SELECTED MEASUREMENTS SUPPORTED BY BASE BUDGET EXPENDITURES

1. Goal Description
 - a.. Performance Measurement
 - b. Performance Measurement
 - c. Performance Measurement__
2. Goal Description
 - a.. Performance Measurement
 - b. Performance Measurement
 - c. Performance Measurement__
3. Goal Description
 - a.. Performance Measurement
 - b. Performance Measurement
 - c. Performance Measurement

2011 BIENNIAL NEW PROGRAMS OR SIGNIFICANT EXPANSIONS GOALS, AND SELECTED MEASUREMENTS

1. Goal Description
 - a.. Performance Measurement

- b. Performance Measurement
 - c. Performance Measurement__
- 2. Goal Description
 - a.. Performance Measurement
 - b. Performance Measurement
 - c. Performance Measurement__
- 3. Goal Description
 - a.. Performance Measurement
 - b. Performance Measurement
 - c. Performance Measurement

MAJOR PERFORMANCE CHALLENGES

What issues contributing to division/program results may present obstacles or challenges to ensuring achievement of the performance measurements for the goals outlined above?

- 1. __
- 2. __
- 3. __
- 4. __

BUDGET AND POLICY ISSUES

A complete listing of the division/program’s list of specific decision packages is included in the Legislative Fiscal Division’s 2011 Biennium Budget Analysis. What budget and policy issues themes is the division/program addressing with its budget request?

SIGNIFICANT ISSUES EXPANDED

The division/program’s budget submission includes decision packages to address the following issues.

- 1. __
- 2. __
- 3. __

JOINT APPROPRIATION SUBCOMMITTEE BUDGETARY NARRATIVE

2009 LEGISLATIVE FINANCE COMMITTEE PERFORMANCE MEASUREMENT INITIATIVE NARRATIVE

- Narrative on challenges and issues relating to measurements. Discussion of story behind successfully achieving results or challenges to overcome to meet the measurements in the future and date meeting measurements is anticipated.

Goals and Measurable Objectives (Performance Measurements)

The following figure shows the division/program base year biennial goals and performance measures related to the based budget for the 2011 biennium. These are goals funded through the base budget. An estimate of the percentage of the biennial base budget supporting each goal is shown below as are the current status of the measurements.

Department Name Division/Program Name			
Measurable Objectives for the 2011 Biennium			
Goal	Percentage of Biennial Base	Performance Measurement	Current status of Measures

MAJOR PERFORMANCE CHALLENGES

Narrative on the major performance challenges facing the division/program/subprogram

FTE -

The legislative approved appropriations for an additional X FTE in the 2009 Biennium. The following figure shows the positions and the hire dates for the new FTE.

2009 Biennium FTE Hire Dates	FTE	Date

CORRECTIVE ACTION PLANS

The Division, Program had X legislative audit recommendations and associated corrective action plans in place during the 2009 biennium. Auditors recommended XXX. The division, program has implemented XXX of the recommendations and will complete XXX of the recommendation by XXX.

The Division, Program had X federal audit recommendation and associated corrective action plans in place during the 2009 biennium. Auditors recommended XXX. The division, program has implemented XXX of the recommendations and will complete XXX of the recommendations by XXX.

Other audit recommendations

BUDGET

The budget for the (division, program, subprogram) is included in the Legislative Fiscal Division Budget Analysis, Volume X, Page X.

SIGNIFICANT POLICY AND BUDGET ISSUES

The following narrative describes the significant policy and budget issues for the (division, program). Specific decision packages are referenced below.

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