

# MEMORANDUM

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**To:** General Government Subcommittee  
**From:** John Borden, Legislative Fiscal Office  
(503) 986-1842  
**Date:** May 8<sup>th</sup>, 2013  
**Subject:** Oregon Advocacy Commission's Office – SB 5501  
Work Session Recommendations

## Advocacy Commission Office– Agency Totals

Fund-type Positions/FTE	2009-11 Actuals	2011-13 Legislatively Approved	2013-15 Current Service Level	2013-15 LFO Recommended
General Fund	366,193	368,932	411,324	415,026
Other Funds	18,125	40,000	40,960	40,960
<b>Total Funds</b>	<b>\$384,318</b>	<b>\$408,932</b>	<b>\$452,284</b>	<b>\$455,986</b>
Positions	2	2	2	2
FTE	2.00	2.00	2.00	2.00

Attached are the recommendations from the Legislative Fiscal Office for the Oregon Advocacy Commission's Office. It contains the following:

- Package 091 – Statewide Administrative Savings (\$2,863 GF)
- Package 092 – PERS Tax Policy (\$803 GF)
- Package 093 – Other PERS Adjustments (\$6,423 GF)
- Package 100 – Commissioner Outreach and Awareness (\$10,300 GF)
- Package 101 – Work Study Student Outreach and Advocacy Support (\$3,491 GF)

### Adjustments to Current Service Level:

See attached "Work Session Presentation Report" dated 5/1/2013.

**Co-Chair: I move that the General Government Subcommittee approve the LFO recommendations to SB 5501.**

### Performance Measures

See attached "Legislatively Proposed 2013-15 Key Performance Measures" form.

- Adjust upward targets for customer service KPMs.

- Replace KPM 7a and 7b related to best practice the Commissions and the Commission Office with the standardized KPM for Best Practices for Boards and Commissions for each Commission. Target is to 100% for each commission. (see attached)

**Co-Chair: I move that the General Government Subcommittee approve the LFO Key Performance Measure recommendations.**

**Recommended Changes to Appropriation Bill:**

The Legislative Fiscal Office recommends a budget of *\$415,026 General Fund and \$40,960 Other Funds and two positions (2.00 FTE)*. There is no amendment to the measure.

**HB/SB 5501 Final Subcommittee Action:**

**Co-Chair: I move SB 5501 to the full committee with a “do pass” recommendation.**

**Chair to assign carriers:**

**Full:** \_\_\_\_\_  
**2<sup>nd</sup> Chamber:** \_\_\_\_\_

LFO102 - Work Session Presentation Report  
2013-15 Biennium

Version: L - 01 - LFO Analyst Recommended  
Cross Reference: 13100-000-00-00-00000  
Oregon Advocacy Commissions Office

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2011-13 Agy. Leg. Adopted	368,932	-	40,000	-	-	-	408,932	2	2.00
2011-13 Ebds, SS & Admin Act	-	-	-	-	-	-	-	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2011-13 Leg Approved Budget	368,932	-	40,000	-	-	-	408,932	2	2.00
2011-13 Leg Approved Budget (Base)	368,932	-	40,000	-	-	-	408,932	2	2.00
Summary of Base Adjustments	39,746	-	-	-	-	-	39,746	-	-
2013-15 Base Budget	408,678	-	40,000	-	-	-	448,678	2	2.00
010: Non-PICS Pers Svc/Vacancy Factor	(1,061)	-	-	-	-	-	(1,061)	-	-
030: Inflation & Price List Adjustments	3,707	-	960	-	-	-	4,667	-	-
2013-15 Current Service Level	411,324	-	40,960	-	-	-	452,284	2	2.00
Adjusted 2013-15 Current Service Level	411,324	-	40,960	-	-	-	452,284	2	2.00
Total LFO Recommended Packages	3,702	-	-	-	-	-	3,702	-	-
2013-15 Legislative Actions	415,026	-	40,960	-	-	-	455,986	2	2.00
Net change from 2011-13 Leg Approved Budget	46,094	-	960	-	-	-	47,054	-	-
Percent change from 2011-13 Leg Approved Budget	12.5%	0.0%	2.4%	0.0%	0.0%	0.0%	11.5%	0.0%	0.0%
Net change from 2013-15 Current Service Level	3,702	-	-	-	-	-	3,702	-	-
Percent change from 2013-15 Current Service Level	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%

LFO102 - Work Session Presentation Report  
2013-15 BienniumVersion: L - 01 - LFO Analyst Recommended  
Cross Reference: 13100-001-00-00-00000  
Oregon Advocacy Commissions Office

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2011-13 Ebds, SS & Admin Act	-	-	-	-	-	-	-	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2011-13 Leg Approved Budget	368,932	-	40,000	-	-	-	408,932	2	2.00
2011-13 Leg Approved Budget (Base)	368,932	-	40,000	-	-	-	408,932	2	2.00
Summary of Base Adjustments	39,746	-	-	-	-	-	39,746	-	-
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Percent change from 2013-15 Current Service Level	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%

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**Package 091 Statewide Administrative Savings**

Package Description This package is a placeholder for administrative efficiencies in finance, information technology, human resources, accounting, payroll, and procurement expenditures. The Executive Branch had intended for these reductions to be specified in the Governor's 2013-15 recommended budget. The Department of Administrative Services will continue to work on details of these reductions with agencies and report back during the 2014 session.

LFO Recommendation Approve the policy package.

LFO Analyst Notes SB 5501 (2013)

LFO Recommended	(2,863)	-	-	-	-	-	(2,863)	-	-
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	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 092 PERS Taxation Policy**

Package Description This package reflects the policy change in SB 822 that eliminates the increased retirement benefits resulting from Oregon income taxation of payments if the person receiving payments does not pay Oregon income tax on those benefits and is not an Oregon resident. This change reduces state employer contribution rates by approximately 0.30%.

LFO Recommendation Approve the policy package.

LFO Analyst Notes SB 5501 (2013)

LFO Recommended	(803)	-	-	-	-	-	(803)	-	-
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	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 093 Other PERS Adjustments**

Package Description This package reflects the policy change in SB 822 that modifies the cost-of-living adjustment under the Public Employees Retirement System. This change reduces state employer contribution rates by approximately 2.2%.

An administrative action by the PERS Board, as directed by a budget note in the SB 822 budget report, will reduce state employer contribution rates by up to an additional 1.9%. However, no employer rate is reduced below its 2011-13 biennium rate.

LFO Recommendation Approve the policy package.

LFO Analyst Notes SB 5501 (2013)

LFO Recommended	(6,423)	-	-	-	-	-	(6,423)	-	-
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	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 100 Restore Travel**

Package Description This package increases the instate travel reimbursement budget for the four commissions (36 members, excluding eight legislators) and two commission staff. Instate travel includes standard mileage and per diem (ORS 292.495).

The goal of the package is to augment the existing instate travel costs of the agency and then add travel reimbursement for at least one additional meeting per biennium per commission for meetings in Eastern, Southern, and Western Oregon. Currently, the individual commissions meet 12 times per biennium totaling 48 regular meetings per biennium.

The current instate budget for the agency is \$3,239. The package adds \$7,800, or \$1,950 per commission and \$2,500 in staff instate travel. The package totals \$10,300 General Fund.

LFO Recommendation Approve the policy package.

Budget Instructions This policy package is approved under the condition that the General Fund provided be used exclusively for instate travel reimbursement. The agency should be prepared to report to the Legislature in 2015 on the actual travel and expenditures incurred by the Commission and its staff.

LFO Analyst Notes SB 5501 (2013)

LFO Recommended	10,300	-	-	-	-	-	10,300	-	-
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	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 Leadership Dev - Work Study Student**

Package Description This package funds a portion (25%) of a Portland State University (PSU) work study student for 20 hours per month to update each of the four commission websites as well as conduct research for the commissions. PSU will be the employer of record for the student and provide 75% of the funding.

The package totals \$3,491 General Fund.

LFO Recommendation Approve the package.

Budget Instructions The policy package is approved as a one-time expenditure and is to be phase-out of the agency's 2015-17 budget.

LFO Analyst Notes SB 5501 (2013)

LFO Recommended	3,491	-	-	-	-	-	3,491	-	-
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## Legislatively Proposed 2013-2015 Key Performance Measures

**Agency: OREGON ADVOCACY COMMISSIONS**

**Mission:** Responsible for administrative support to the Commissions as they strive for implementation and establishment of economic, social, legal and political equality for minorities in Oregon.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2014	Target 2015
2 - Best Practices - Percent of total best practices met by the Commission on Asian/Pacific Islander Affairs		Proposed New KPM		100.00	100.00
3 - Best Practices - Percent of total best practices met by the Commission on Black Affairs		Proposed New KPM		100.00	100.00
4 - Best Practices - Percent of total best practices met by the Commission on Woman.		Proposed New KPM		100.00	100.00
5 - Best Practices - Percent of total best practices met by the Commission on Hispanic Affairs		Proposed New KPM		100.00	100.00
7 a - BEST PRACTICES: Percent of total best practices met for Boards and Commissions - COMMISSIONS.		Proposed Delete KPM	83.00	100.00	100.00
7 b - BEST PRACTICES: Percent of total best practices met for Boards and Commissions - OREGON ADVOCACY COMMISSION OFFICE.		Proposed Delete KPM	91.00		
1 - CUSTOMER SERVICE: percent of customers rating service quality as good or excellent-overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information	Accuracy	Approved KPM	87.00	90.00	90.00
1 - CUSTOMER SERVICE: percent of customers rating service quality as good or excellent-overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information	Availability of Information	Approved KPM	82.00	90.00	90.00
1 - CUSTOMER SERVICE: percent of customers rating service quality as good or excellent-overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information	Expertise	Approved KPM	85.00	90.00	90.00
1 - CUSTOMER SERVICE: percent of customers rating service quality as good or excellent-overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information	Helpfulness	Approved KPM	86.00	90.00	90.00

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Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2014	Target 2015
1 - CUSTOMER SERVICE: percent of customers rating service quality as good or excellent-overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information	Overall	Approved KPM	85.00	90.00	90.00
1 - CUSTOMER SERVICE: percent of customers rating service quality as good or excellent-overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information	Timeliness	Approved KPM	87.00	90.00	90.00

**LFO Recommendation:**

The Legislative Fiscal Office (LFO) recommends increasing the 2014 and 2015 targets for the agency as follows: Overall = 90%; Accuracy = 90%; Availability of Information = 85%; Expertise = 90%; Helpfulness = 90%; Timeliness = 90%. LFO recommends that KPM 7a - Best Practices for the Commissions and 7B - Best Practices for the Advocacy Commission Office be replaced with the standardized Board and Commission Best Practices KPM for each of the four commissions. The targets for these new KPMs is 100%.

**Sub-Committee Action:**

# Self-Assessment Criteria

<b>Best Practices Criteria</b>	<b>Yes</b>	<b>No</b>
<ol style="list-style-type: none"> <li>1. Executive Director's performance expectations are current.</li> <li>2. Executive Director receives annual performance feedback.</li> <li>3. The agency's mission and high-level goals are current and applicable.</li> <li>4. The board reviews the <i>Annual Performance Progress Report</i>.</li> <li>5. The board is appropriately involved in review of agency's key communications.</li> <li>6. The board is appropriately involved in policy-making activities.</li> <li>7. The agency's policy option packages are aligned with their mission and goals.</li> <li>8. The board reviews all proposed budgets (likely occurs every other year).</li> <li>9. The board periodically reviews key financial information and audit findings.</li> <li>10. The board is appropriately accounting for resources.</li> <li>11. The agency adheres to accounting rules and other relevant financial controls.</li> <li>12. Board members act in accordance with their roles as public representatives.</li> <li>13. The board coordinates with others where responsibilities and interests overlap.</li> <li>14. The board members identify and attend appropriate training sessions.</li> <li>15. The board reviews its management practices to ensure best practices are utilized.</li> <li>16. Others</li> </ol>		
<b>Totals</b>		
<b>Percentage of Total</b>		

# Senate Bill 5501

Printed pursuant to Senate Interim Rule 213.28 by order of the President of the Senate in conformance with pre-session filing rules, indicating neither advocacy nor opposition on the part of the President (at the request of Oregon Department of Administrative Services)

## SUMMARY

The following summary is not prepared by the sponsors of the measure and is not a part of the body thereof subject to consideration by the Legislative Assembly. It is an editor's brief statement of the essential features of the measure as introduced.

Appropriates moneys from General Fund to Oregon Advocacy Commissions Office for biennial expenses.

Limits biennial expenditures from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by office.

Declares emergency, effective July 1, 2013.

## A BILL FOR AN ACT

1  
2 Relating to the financial administration of the Oregon Advocacy Commissions Office; appropriating  
3 money; limiting expenditures; and declaring an emergency.

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

5 **SECTION 1. There is appropriated to the Oregon Advocacy Commissions Office, for the**  
6 **biennium beginning July 1, 2013, out of the General Fund, the amount of \$415,026.**

7 **SECTION 2. Notwithstanding any other law limiting expenditures, the amount of \$40,960**  
8 **is established for the biennium beginning July 1, 2013, as the maximum limit for payment of**  
9 **expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but ex-**  
10 **cluding lottery funds and federal funds, collected or received by the Oregon Advocacy Com-**  
11 **missions Office.**

12 **SECTION 3. This 2013 Act being necessary for the immediate preservation of the public**  
13 **peace, health and safety, an emergency is declared to exist, and this 2013 Act takes effect**  
14 **July 1, 2013.**

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**Note: For budget, see 2013-2015 Biennial Budget**

**NOTE:** Matter in boldfaced type in an amended section is new; matter [*italic and bracketed*] is existing law to be omitted. New sections are in boldfaced type.