

**OREGON  
COMMISSION  
FOR THE  
BLIND**

*Expanding Opportunities  
for Oregonians with  
Vision Loss*



# **Governor's Budget 2017 - 2019**

**Commissioners:**

Prateek Dujari, Chair

Vivian Carlisle-Smith

Christi Closson MD

Laurel Hudson

Scott McCallum

Jeanne-Marie Moore

Sharon Zenger

# Budget Narrative

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## Oregon Commission for the Blind Governor's Budget

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# CERTIFICATION

I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the accuracy of all numerical information has been verified.

Commission for the Blind

\_\_\_\_\_  
**AGENCY NAME**

*[Handwritten Signature]*

\_\_\_\_\_  
**SIGNATURE**

535 SE 12<sup>th</sup> Avenue, Portland, OR 97214

\_\_\_\_\_  
**AGENCY ADDRESS**

Commission Chair

\_\_\_\_\_  
**TITLE**

Notice: Requests of agencies headed by a board or commission must be approved by official action of those bodies and signed by the board or commission chairperson.

The requests of other agencies must be approved and signed by the agency director or administrator.

Agency Request

Governor's Budget

Legislatively Adopted

Budget Page \_\_\_\_\_

# Budget Narrative

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## LEGISLATIVE ACTION

**Joint Committee On Ways and Means**

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**Action:** Do Pass.

**Action Date:** 05/22/15

**Vote:**

**House**

**Yeas:** 10 - Buckley, Gomberg, Huffman, Komp, Nathanson, Rayfield, Smith, Whisnant, Whitsett, Williamson

**Exc:** 2 - McLane, Read

**Senate**

**Yeas:** 10 - Devlin, Girod, Hansell, Johnson, Monroe, Roblan, Steiner Hayward, Thomsen, Whitsett, Winters

**Exc:** 2 - Burdick, Shields

**Prepared By:** Clair Clark, Department of Administrative Services

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

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**Agency:** Commission for the Blind

**Biennium:** 2015-17

**Budget Summary\***

	2013-15 Legislatively Approved Budget <sup>(1)</sup>	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				\$ Change	% Change
General Fund	\$ 1,598,027	\$ 1,608,959	\$ 2,900,038	\$ 1,302,011	81.5%
Other Funds Limited	\$ 2,025,381	\$ 1,512,345	\$ 993,000	\$ (1,032,381)	-51.0%
Federal Funds Limited	\$ 12,693,894	\$ 12,510,659	\$ 12,361,939	\$ (331,955)	-2.6%
Total	\$ 16,317,302	\$ 15,631,963	\$ 16,254,977	\$ (62,325)	-0.4%

**Position Summary**

Authorized Positions	51	50	56	5
Full-time Equivalent (FTE) positions	46.98	46.21	52.21	5.23

<sup>(1)</sup> Includes adjustments through December 2014

\* Excludes Capital Construction expenditures

**Revenue Summary**

Federal Funds are the Commission for the Blind’s largest source of funding. These are primarily from the U.S. Department of Education, and are matched at a rate of 78.7 percent Federal Funds for basic vocational rehabilitation support and as high as 90 percent Federal Funds for in-service training and independent living. General Fund and certain Other Funds are used to meet the federal maintenance of effort and matching requirements. Other Funds revenue sources include cooperative agreements with school districts and other providers, business enterprise vendor assessments, and donations.

**Summary of Human Services Subcommittee Action**

The Commission for the Blind’s mission is to assist blind Oregonians in making informed choices to achieve full inclusion and integration in society through employment, independent living, and social self-sufficiency. The agency’s programs are focused on two main objectives: employment and independence.

The Subcommittee recommended a 2015-17 budget of \$16,254,977 total funds (\$2,900,038 General Fund, \$993,000 Other Funds and \$12,361,939 Federal Funds) and 56 positions (52.21 FTE). This is a 0.4 percent total funds reduction over the agency’s 2013-15 Legislatively Approved Budget.



### Administrative Services – 001

The Administrative Services unit provides support and leadership to the entire agency. This includes responsibility for management of human resources, budget, accounting, operations and information systems. For this unit, the Subcommittee approved a 2015-17 budget of \$1,805,830 total funds (\$305,412 General Fund, \$37,601 Other Funds and \$1,462,817 Federal Funds) and eight positions (7.48 FTE). This includes the following adjustments to the current service level:

- Package 070, Revenue Shortfall, reduces \$247,191 total funds (\$54,147 Other Funds and \$193,044 Federal Funds) to balance expenditures to projected revenues. This package eliminates two positions (1.48 FTE) funded through lost revenue sources: one Principal Executive Manager D (1.00 FTE) position and one Office Specialist 2 (0.48 FTE) position. The amount of revenue available to the Commission is driven by the amount of state funds available to provide the match required to access Federal Funds. In the last two biennia, the Commission was directed to draw down its Bequests and Donations account to achieve this match in lieu of a larger General Fund appropriation. This package reflects that those funds are projected to be depleted by the end of the 2013-15 biennium.
- Package 101, Maintain Services through General Fund Restoration, provides \$230,671 total funds (\$54,147 General Fund and \$176,524 Federal Funds) to maintain current service level operations and prevent the reductions identified in Package 070 to address the revenue shortfall. This package restores two positions (1.48 FTE): one Principal Executive Manager D (1.00 FTE) position and one Office Specialist 2 (0.48 FTE) position. In addition to preventing the reductions discussed in package 070, this package prevents the Commission from facing maintenance of effort penalties and from imposing an Order of Selection requirement due to insufficient staff and services.

### Rehabilitative Services – 002

The Rehabilitation Services unit provides comprehensive, goal-oriented services to Oregonians who are blind to maximize their independence in their communities through work and independent living skills. Clients are assisted in identifying barriers to full participation in society through individualized plans developed to overcome these barriers and reach their goals. For this unit, the Subcommittee approved a 2015-17 budget of \$10,159,829 total funds (\$1,399,820 General Fund, \$600,208 Other Funds, and \$8,159,801 Federal Funds) and 30 positions (28.13 FTE).

- Package 070, Revenue Shortfall, reduces \$1,646,966 total funds (\$344,134 Other Funds and \$1,302,832 Federal Funds) to balance expenditures to projected revenues. This package eliminates seven positions (8.33 FTE) funded through lost revenue sources. It eliminates five Vocational Rehabilitation Counselors and two Rehabilitation Instructors for the Blind and reduces the FTE for one Vocational Rehabilitation Counselor by 0.79 FTE and an Office Specialist 2 by 0.54 FTE for a total reduction of 8.33 FTE. The amount of revenue available to the Commission is driven by the amount of state funds available to provide the match required to access Federal Funds. In the last two biennia, the Commission was directed to draw down its Bequests and Donations account to achieve this match in lieu of a larger General Fund appropriation. This package reflects that those funds are projected to be depleted by the end of the 2013-15 biennium.
- Package 101, Maintain Services through General Fund Restoration, provides \$1,554,723 total funds (\$228,191 General Fund and \$1,326,532 Federal Funds) to maintain current service level operations and prevent the reductions identified in Package 070 to address the revenue shortfall. This package restores seven positions (8.33 FTE): five Vocational Rehabilitation Counselor (5.00 FTE) positions and two Rehabilitation Instructor for the Blind (2.00 FTE) positions and restores 0.79 FTE for one Vocational Rehabilitation Counselor and 0.54 FTE for one Office Specialist 2 position. In addition to preventing the reductions discussed in Package 070, this package prevents the

SB 5503 A

Commission from facing maintenance of effort penalties and from imposing an Order of Selection requirement due to insufficient staff and services.

- Package 102, Independent Living for Older Blind Population Enhancements, provides \$453,422 General Fund to establish three Rehabilitation Instructor (3.00 FTE) positions to serve an anticipated 270 additional clients annually. This package will allow the Commission to dedicate staff time more efficiently in providing independent living evaluations; adaptive technologies, mobility, self-care, cooking, and cleaning training; as well as other services to individuals in the Independent Living Older Blind program. This package will also allow the Commission to do outreach to Oregon's increasing aging population who are currently underserved.

#### Business Enterprises – 003

The Business Enterprises program trains, licenses and supports individuals who are legally blind to enable them to operate food service and vending businesses in public buildings. For this unit, the Subcommittee approved a 2015-17 budget of \$1,283,518 total funds (\$535,358 General Fund, \$225,060 Other Funds, and \$523,100 Federal Funds) and five positions (5.00 FTE).

- Package 070, Revenue Shortfall, reduces \$207,239 total funds (\$36,760 Other Funds and \$170,479 Federal Funds) to balance expenditures to projected revenues. This package eliminates one Program Analyst position (1.00 FTE) funded through lost revenue. The amount of revenue available to the Commission is driven by the amount of state funds available to provide the match required to access Federal Funds. In the last two biennia, the Commission was directed to draw down its Bequests and Donations account to achieve this match in lieu of a larger General Fund appropriation. This package reflects that those funds are projected to be depleted by the end of the 2013-15 biennium.
- Package 101, Maintain Services through General Fund Restoration, provides \$172,577 total funds (\$36,759 General Fund and \$135,818 Federal Funds) to maintain current service level operations and prevent the reductions identified in Package 070 to address the revenue shortfall. This package restores one Program Analyst (1.00 FTE) position. In addition to preventing the reductions discussed in Package 070, this package prevents the Commission from facing maintenance of effort penalties and from imposing an Order of Selection requirement due to insufficient staff and services.
- Package 103, Improve Business Environment for Blind Entrepreneurs, provides \$434,275 General Fund to improve the efficiency of existing operations and to expand business opportunities for blind entrepreneurs. This package establishes three full-time positions: two Program Analyst 1 (2.00 FTE) positions and one Executive Support Specialist (1.00 FTE) position. These positions will bolster the viability of the Business Enterprises (BE) program by responding to the increasing need for strategic and technical services requested by program participants in order to grow their businesses and increase sales and income. With this package, the Commission will aim to increase the average BE manager's income by 10 to 20 percent, and license a minimum of four additional BE managers per biennium.

### Orientation Center for the Blind – 005

The Orientation and Career Center for the Blind is a highly specialized training program for Oregonians who experience blindness. It provides the intensive skills training that individuals who are blind need in order to accomplish tasks they were previously able to do visually. For this unit, the Subcommittee approved a 2015-17 budget of \$3,005,800 total funds (\$659,448 General Fund, \$130,131 Other Funds, and \$2,216,221 Federal Funds) and 13 positions (11.60 FTE). This includes the following adjustments to the current service level:

- Package 070, Revenue Shortfall, reduces \$272,212 total funds (\$84,304 Other Funds and \$187,908 Federal Funds) to balance expenditures to projected revenues. This package eliminates 1.10 FTE for Rehabilitation Instructors for the Blind funded through lost revenue. The amount of revenue available to the Commission is driven by the amount of state funds available to provide the match required to access Federal Funds. In the last two biennia, the Commission was directed to draw down its Bequests and Donations account to achieve this match in lieu of a larger General Fund appropriation. This package reflects that those funds are projected to be depleted by the end of the 2013-15 biennium.
- Package 101, Maintain Services through General Fund Restoration, provides \$150,954 total funds (\$84,285 General Fund and \$66,669 Federal Funds) to maintain current service level operations. This package prevents the reductions identified in package 070 to address the revenue shortfall and restores 1.10 FTE for Rehabilitation Instructors for the Blind. In addition to preventing the reductions discussed in package 070, this package prevents the Commission from facing maintenance of effort penalties and from imposing an Order of Selection requirement due to insufficient staff and services.

### Summary of Performance Measure Action

See attached Legislatively Adopted 2015-17 Key Performance Measures form.

**DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION**

**SB 5503-A**

Oregon Comission for the Blind  
Clair Clark -- 503-378-3117

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
2013-15 Legislatively Approved Budget at Dec 2014 *	\$ 1,598,027	\$ -	\$ 2,025,381	\$ -	\$ 12,693,894	\$ -	16,317,302	51	46.98
2015-17 Current Service Level (CSL)*	\$ 1,608,959	\$ -	\$ 1,512,345	\$ -	\$ 12,510,659	\$ -	15,631,963	50	46.21
<b>SUBCOMMITTEE ADJUSTMENTS (from CSL)</b>									
<b>SCR 001 - Administrative Services</b>									
Package 070: Revenue Shortfalls									
Personal Services	\$ -	\$ -	\$ (54,147)	\$ -	\$ (176,524)	\$ -	(230,671)	-2	-1.48
Services and Supplies	\$ -	\$ -	\$ -	\$ -	\$ (16,520)	\$ -	(16,520)		
Package 101: Maintain Services through General Fund Restoration									
Personal Services	\$ 54,147	\$ -	\$ -	\$ -	\$ 176,524	\$ -	230,671	2	1.48
<b>SCR 002 - Rehabilitative Services</b>									
Package 070: Revenue Shortfalls									
Personal Services	\$ 101	\$ -	\$ (201,263)	\$ -	\$ (1,075,088)	\$ -	(1,276,250)	-7	-8.33
Services and Supplies	\$ -	\$ -	\$ (107,031)	\$ -	\$ (103,051)	\$ -	(210,082)		
Special Payments	\$ (101)	\$ -	\$ (35,840)	\$ -	\$ (124,693)	\$ -	(160,634)		
Package 101: Maintain Services through General Fund Restoration									
Personal Services	\$ 201,251	\$ -	\$ -	\$ -	\$ 1,075,000	\$ -	1,276,251	7	8.33
Special Payments	\$ 26,940	\$ -	\$ -	\$ -	\$ 251,532	\$ -	278,472		
Package 102: Independent Living for Older Blind									
Personal Services	\$ 398,696	\$ -	\$ -	\$ -	\$ -	\$ -	398,696	3	3.00
Services and Supplies	\$ 54,726	\$ -	\$ -	\$ -	\$ -	\$ -	54,726		
<b>SCR 003 - Business Enterprises</b>									
Package 070: Revenue Shortfalls									
Personal Services	\$ -	\$ -	\$ (36,759)	\$ -	\$ (135,818)	\$ -	(172,577)	-1	-1.00
Services and Supplies	\$ -	\$ -	\$ (1)	\$ -	\$ (34,661)	\$ -	(34,662)		
Package 101: Maintain Services through General Fund Restoration									
Personal Services	\$ 36,759	\$ -	\$ -	\$ -	\$ 135,818	\$ -	172,577	1	1.00
Package 103: Improve Business Environment for Blind Entrepreneurs									
Personal Services	\$ 379,549	\$ -	\$ -	\$ -	\$ -	\$ -	379,549	3	3.00
Services and Supplies	\$ 54,726	\$ -	\$ -	\$ -	\$ -	\$ -	54,726		

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
<b>SCR 005 - Orientation Center for the Blind</b>									
Package 070: Revenue Shortfalls									
Personal Services	\$ 28	\$ -	\$ (84,304)	\$ -	\$ (66,674)	\$ -	(150,950)	0	-1.10
Services and Supplies	\$ (28)	\$ -	\$ -	\$ -	\$ (121,234)	\$ -	(121,262)		
Package 101: Maintain Services through General Fund Restoration									
Personal Services	\$ 84,285	\$ -	\$ -	\$ -	\$ 66,669	\$ -	150,954	0	1.10
<b>TOTAL ADJUSTMENTS</b>	<b>\$ 1,291,079</b>	<b>\$ -</b>	<b>\$ (519,345)</b>	<b>\$ -</b>	<b>\$ (148,720)</b>	<b>\$ -</b>	<b>623,014</b>	<b>6</b>	<b>6.00</b>
<b>SUBCOMMITTEE RECOMMENDATION *</b>	<b>\$ 2,900,038</b>	<b>\$ -</b>	<b>\$ 993,000</b>	<b>\$ -</b>	<b>\$ 12,361,939</b>	<b>\$ -</b>	<b>16,254,977</b>	<b>56</b>	<b>52.21</b>
% Change from 2013-15 Leg Approved Budget	81.5%	0.0%	-51.0%	0.0%	-2.6%	0.0%	-0.4%		
% Change from 2015-17 Current Service Level	80.2%	0.0%	-34.3%	0.0%	-1.2%	0.0%	4.0%		

\*Excludes Capital Construction Expenditures



# CERTIFICATION

I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the accuracy of all numerical information has been verified.

Commission for the Blind

\_\_\_\_\_  
**AGENCY NAME**

*Alan D...*

\_\_\_\_\_  
**SIGNATURE**

535 SE 12<sup>th</sup> Avenue, Portland, OR 97214

\_\_\_\_\_  
**AGENCY ADDRESS**

Commission Chair

\_\_\_\_\_  
**TITLE**

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The requests of other agencies must be approved and signed by the agency director or administrator.

\_\_\_\_ Agency Request

Governor's Budget

\_\_\_\_ Legislatively Adopted

Budget Page \_\_\_\_\_

# Budget Narrative

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## LEGISLATIVE ACTION

Seventy-Eighth Oregon Legislative Assembly - 2015 Regular Session  
BUDGET REPORT AND MEASURE SUMMARY

MEASURE: SB 5503 A  
CARRIER: Rep. Stark

Joint Committee On Ways and Means

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Action: Do Pass.

Action Date: 05/22/15

**Vote:**

House

Yeas: 10 - Buckley, Gomberg, Huffman, Komp, Nathanson, Rayfield, Smith, Whisnant, Whitsett, Williamson

Exc: 2 - McLane, Read

Senate

Yeas: 10 - Devlin, Girod, Hansell, Johnson, Monroe, Roblan, Steiner Hayward, Thomsen, Whitsett, Winters

Exc: 2 - Burdick, Shields

**Prepared By:** Clair Clark, Department of Administrative Services

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

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Agency: Commission for the Blind

Biennium: 2015-17

**Budget Summary\***

	2013-15 Legislatively Approved Budget <sup>(1)</sup>	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				\$ Change	% Change
General Fund	\$ 1,598,027	\$ 1,608,959	\$ 2,900,038	\$ 1,302,011	81.5%
Other Funds Limited	\$ 2,025,381	\$ 1,512,345	\$ 993,000	\$ (1,032,381)	-51.0%
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Total	\$ 16,317,302	\$ 15,631,963	\$ 16,254,977	\$ (62,325)	-0.4%

**Position Summary**

Authorized Positions	51	50	56	5
Full-time Equivalent (FTE) positions	46.98	46.21	52.21	5.23

<sup>(1)</sup> Includes adjustments through December 2014

\* Excludes Capital Construction expenditures

**Revenue Summary**

Federal Funds are the Commission for the Blind’s largest source of funding. These are primarily from the U.S. Department of Education, and are matched at a rate of 78.7 percent Federal Funds for basic vocational rehabilitation support and as high as 90 percent Federal Funds for in-service training and independent living. General Fund and certain Other Funds are used to meet the federal maintenance of effort and matching requirements. Other Funds revenue sources include cooperative agreements with school districts and other providers, business enterprise vendor assessments, and donations.

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The Commission for the Blind’s mission is to assist blind Oregonians in making informed choices to achieve full inclusion and integration in society through employment, independent living, and social self-sufficiency. The agency’s programs are focused on two main objectives: employment and independence.

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The Administrative Services unit provides support and leadership to the entire agency. This includes responsibility for management of human resources, budget, accounting, operations and information systems. For this unit, the Subcommittee approved a 2015-17 budget of \$1,805,830 total funds (\$305,412 General Fund, \$37,601 Other Funds and \$1,462,817 Federal Funds) and eight positions (7.48 FTE). This includes the following adjustments to the current service level:

- Package 070, Revenue Shortfall, reduces \$247,191 total funds (\$54,147 Other Funds and \$193,044 Federal Funds) to balance expenditures to projected revenues. This package eliminates two positions (1.48 FTE) funded through lost revenue sources: one Principal Executive Manager D (1.00 FTE) position and one Office Specialist 2 (0.48 FTE) position. The amount of revenue available to the Commission is driven by the amount of state funds available to provide the match required to access Federal Funds. In the last two biennia, the Commission was directed to draw down its Bequests and Donations account to achieve this match in lieu of a larger General Fund appropriation. This package reflects that those funds are projected to be depleted by the end of the 2013-15 biennium.
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### Rehabilitative Services – 002

The Rehabilitation Services unit provides comprehensive, goal-oriented services to Oregonians who are blind to maximize their independence in their communities through work and independent living skills. Clients are assisted in identifying barriers to full participation in society through individualized plans developed to overcome these barriers and reach their goals. For this unit, the Subcommittee approved a 2015-17 budget of \$10,159,829 total funds (\$1,399,820 General Fund, \$600,208 Other Funds, and \$8,159,801 Federal Funds) and 30 positions (28.13 FTE).

- Package 070, Revenue Shortfall, reduces \$1,646,966 total funds (\$344,134 Other Funds and \$1,302,832 Federal Funds) to balance expenditures to projected revenues. This package eliminates seven positions (8.33 FTE) funded through lost revenue sources. It eliminates five Vocational Rehabilitation Counselors and two Rehabilitation Instructors for the Blind and reduces the FTE for one Vocational Rehabilitation Counselor by 0.79 FTE and an Office Specialist 2 by 0.54 FTE for a total reduction of 8.33 FTE. The amount of revenue available to the Commission is driven by the amount of state funds available to provide the match required to access Federal Funds. In the last two biennia, the Commission was directed to draw down its Bequests and Donations account to achieve this match in lieu of a larger General Fund appropriation. This package reflects that those funds are projected to be depleted by the end of the 2013-15 biennium.
- Package 101, Maintain Services through General Fund Restoration, provides \$1,554,723 total funds (\$228,191 General Fund and \$1,326,532 Federal Funds) to maintain current service level operations and prevent the reductions identified in Package 070 to address the revenue shortfall. This package restores seven positions (8.33 FTE): five Vocational Rehabilitation Counselor (5.00 FTE) positions and two Rehabilitation Instructor for the Blind (2.00 FTE) positions and restores 0.79 FTE for one Vocational Rehabilitation Counselor and 0.54 FTE for one Office Specialist 2 position. In addition to preventing the reductions discussed in Package 070, this package prevents the

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Commission from facing maintenance of effort penalties and from imposing an Order of Selection requirement due to insufficient staff and services.

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### Business Enterprises – 003

The Business Enterprises program trains, licenses and supports individuals who are legally blind to enable them to operate food service and vending businesses in public buildings. For this unit, the Subcommittee approved a 2015-17 budget of \$1,283,518 total funds (\$535,358 General Fund, \$225,060 Other Funds, and \$523,100 Federal Funds) and five positions (5.00 FTE).

- Package 070, Revenue Shortfall, reduces \$207,239 total funds (\$36,760 Other Funds and \$170,479 Federal Funds) to balance expenditures to projected revenues. This package eliminates one Program Analyst position (1.00 FTE) funded through lost revenue. The amount of revenue available to the Commission is driven by the amount of state funds available to provide the match required to access Federal Funds. In the last two biennia, the Commission was directed to draw down its Bequests and Donations account to achieve this match in lieu of a larger General Fund appropriation. This package reflects that those funds are projected to be depleted by the end of the 2013-15 biennium.
- Package 101, Maintain Services through General Fund Restoration, provides \$172,577 total funds (\$36,759 General Fund and \$135,818 Federal Funds) to maintain current service level operations and prevent the reductions identified in Package 070 to address the revenue shortfall. This package restores one Program Analyst (1.00 FTE) position. In addition to preventing the reductions discussed in Package 070, this package prevents the Commission from facing maintenance of effort penalties and from imposing an Order of Selection requirement due to insufficient staff and services.
- Package 103, Improve Business Environment for Blind Entrepreneurs, provides \$434,275 General Fund to improve the efficiency of existing operations and to expand business opportunities for blind entrepreneurs. This package establishes three full-time positions: two Program Analyst 1 (2.00 FTE) positions and one Executive Support Specialist (1.00 FTE) position. These positions will bolster the viability of the Business Enterprises (BE) program by responding to the increasing need for strategic and technical services requested by program participants in order to grow their businesses and increase sales and income. With this package, the Commission will aim to increase the average BE manager's income by 10 to 20 percent, and license a minimum of four additional BE managers per biennium.

### Orientation Center for the Blind – 005

The Orientation and Career Center for the Blind is a highly specialized training program for Oregonians who experience blindness. It provides the intensive skills training that individuals who are blind need in order to accomplish tasks they were previously able to do visually. For this unit, the Subcommittee approved a 2015-17 budget of \$3,005,800 total funds (\$659,448 General Fund, \$130,131 Other Funds, and \$2,216,221 Federal Funds) and 13 positions (11.60 FTE). This includes the following adjustments to the current service level:

- Package 070, Revenue Shortfall, reduces \$272,212 total funds (\$84,304 Other Funds and \$187,908 Federal Funds) to balance expenditures to projected revenues. This package eliminates 1.10 FTE for Rehabilitation Instructors for the Blind funded through lost revenue. The amount of revenue available to the Commission is driven by the amount of state funds available to provide the match required to access Federal Funds. In the last two biennia, the Commission was directed to draw down its Bequests and Donations account to achieve this match in lieu of a larger General Fund appropriation. This package reflects that those funds are projected to be depleted by the end of the 2013-15 biennium.
- Package 101, Maintain Services through General Fund Restoration, provides \$150,954 total funds (\$84,285 General Fund and \$66,669 Federal Funds) to maintain current service level operations. This package prevents the reductions identified in package 070 to address the revenue shortfall and restores 1.10 FTE for Rehabilitation Instructors for the Blind. In addition to preventing the reductions discussed in package 070, this package prevents the Commission from facing maintenance of effort penalties and from imposing an Order of Selection requirement due to insufficient staff and services.

### Summary of Performance Measure Action

See attached Legislatively Adopted 2015-17 Key Performance Measures form.

**DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION**

**SB 5503-A**

Oregon Commission for the Blind  
Clair Clark -- 503-378-3117

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
2013-15 Legislatively Approved Budget at Dec 2014 *	\$ 1,598,027	\$ -	\$ 2,025,381	\$ -	\$ 12,693,894	\$ -	16,317,302	51	46.98
2015-17 Current Service Level (CSL)*	\$ 1,608,959	\$ -	\$ 1,512,345	\$ -	\$ 12,510,659	\$ -	15,631,963	50	46.21
<b>SUBCOMMITTEE ADJUSTMENTS (from CSL)</b>									
<b>SCR 001 - Administrative Services</b>									
Package 070: Revenue Shortfalls									
Personal Services	\$ -	\$ -	\$ (54,147)	\$ -	\$ (176,524)	\$ -	(230,671)	-2	-1.48
Services and Supplies	\$ -	\$ -	\$ -	\$ -	\$ (16,520)	\$ -	(16,520)		
Package 101: Maintain Services through General Fund Restoration									
Personal Services	\$ 54,147	\$ -	\$ -	\$ -	\$ 176,524	\$ -	230,671	2	1.48
<b>SCR 002 - Rehabilitative Services</b>									
Package 070: Revenue Shortfalls									
Personal Services	\$ 101	\$ -	\$ (201,263)	\$ -	\$ (1,075,088)	\$ -	(1,276,250)	-7	-8.33
Services and Supplies	\$ -	\$ -	\$ (107,031)	\$ -	\$ (103,051)	\$ -	(210,082)		
Special Payments	\$ (101)	\$ -	\$ (35,840)	\$ -	\$ (124,693)	\$ -	(160,634)		
Package 101: Maintain Services through General Fund Restoration									
Personal Services	\$ 201,251	\$ -	\$ -	\$ -	\$ 1,075,000	\$ -	1,276,251	7	8.33
Special Payments	\$ 26,940	\$ -	\$ -	\$ -	\$ 251,532	\$ -	278,472		
Package 102: Independent Living for Older Blind									
Personal Services	\$ 398,696	\$ -	\$ -	\$ -	\$ -	\$ -	398,696	3	3.00
Services and Supplies	\$ 54,726	\$ -	\$ -	\$ -	\$ -	\$ -	54,726		
<b>SCR 003 - Business Enterprises</b>									
Package 070: Revenue Shortfalls									
Personal Services	\$ -	\$ -	\$ (36,759)	\$ -	\$ (135,818)	\$ -	(172,577)	-1	-1.00
Services and Supplies	\$ -	\$ -	\$ (1)	\$ -	\$ (34,661)	\$ -	(34,662)		
Package 101: Maintain Services through General Fund Restoration									
Personal Services	\$ 36,759	\$ -	\$ -	\$ -	\$ 135,818	\$ -	172,577	1	1.00
Package 103: Improve Business Environment for Blind Entrepreneurs									
Personal Services	\$ 379,549	\$ -	\$ -	\$ -	\$ -	\$ -	379,549	3	3.00
Services and Supplies	\$ 54,726	\$ -	\$ -	\$ -	\$ -	\$ -	54,726		

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
<b>SCR 005 - Orientation Center for the Blind</b>									
Package 070: Revenue Shortfalls									
Personal Services	\$ 28	\$ -	\$ (84,304)	\$ -	\$ (66,674)	\$ -	(150,950)	0	-1.10
Services and Supplies	\$ (28)	\$ -	\$ -	\$ -	\$ (121,234)	\$ -	(121,262)		
Package 101: Maintain Services through General Fund Restoration									
Personal Services	\$ 84,285	\$ -	\$ -	\$ -	\$ 66,669	\$ -	150,954	0	1.10
<b>TOTAL ADJUSTMENTS</b>	<b>\$ 1,291,079</b>	<b>\$ -</b>	<b>\$ (519,345)</b>	<b>\$ -</b>	<b>\$ (148,720)</b>	<b>\$ -</b>	<b>623,014</b>	<b>6</b>	<b>6.00</b>
<b>SUBCOMMITTEE RECOMMENDATION *</b>	<b>\$ 2,900,038</b>	<b>\$ -</b>	<b>\$ 993,000</b>	<b>\$ -</b>	<b>\$ 12,361,939</b>	<b>\$ -</b>	<b>16,254,977</b>	<b>56</b>	<b>52.21</b>
% Change from 2013-15 Leg Approved Budget	81.5%	0.0%	-51.0%	0.0%	-2.6%	0.0%	-0.4%		
% Change from 2015-17 Current Service Level	80.2%	0.0%	-34.3%	0.0%	-1.2%	0.0%	4.0%		

\*Excludes Capital Construction Expenditures

## Legislatively Approved 2015-2017 Key Performance Measures

**Agency: BLIND, COMMISSION for the**

Mission: To assist Oregonians who are blind in making informed choices and decisions to achieve full inclusion and integration in society through employment, independent living, and social self-sufficiency.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
1 - EMPLOYMENT- Percentage of individuals who enter into individualized plans for employment in the vocational rehabilitation program who are successful in reaching their outcome.		Approved KPM	77.00	68.90	68.90
2 - INDEPENDENT LIVING- Percentage of older individuals who complete independent living services who self assess as having an increase in confidence, skills, and abilities.		Approved KPM	95.00	85.00	85.00
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Accuracy	Approved KPM	84.80	96.50	96.50
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Availability of Information	Approved KPM	87.80	96.50	96.50
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Expertise	Approved KPM	91.00	96.50	96.50
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Helpfulness	Approved KPM	90.90	96.50	96.50
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Overall	Approved KPM	90.90	96.50	96.50



## Legislatively Approved 2015-2017 Key Performance Measures

**Agency: BLIND, COMMISSION for the**

Mission: To assist Oregonians who are blind in making informed choices and decisions to achieve full inclusion and integration in society through employment, independent living, and social self-sufficiency.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
1 - EMPLOYMENT- Percentage of individuals who enter into individualized plans for employment in the vocational rehabilitation program who are successful in reaching their outcome.		Approved KPM	77.00	68.90	68.90
2 - INDEPENDENT LIVING- Percentage of older individuals who complete independent living services who self assess as having an increase in confidence, skills, and abilities.		Approved KPM	95.00	85.00	85.00
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Accuracy	Approved KPM	84.80	96.50	96.50
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Availability of Information	Approved KPM	87.80	96.50	96.50
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Expertise	Approved KPM	91.00	96.50	96.50
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Helpfulness	Approved KPM	90.90	96.50	96.50
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Overall	Approved KPM	90.90	96.50	96.50

**Agency: BLIND, COMMISSION for the**

Mission: To assist Oregonians who are blind in making informed choices and decisions to achieve full inclusion and integration in society through employment, independent living, and social self-sufficiency.

<b>Legislatively Proposed KPMs</b>	<b>Customer Service Category</b>	<b>Agency Request</b>	<b>Most Current Result</b>	<b>Target 2016</b>	<b>Target 2017</b>
3 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Timeliness	Approved KPM	84.40	96.50	96.50
4 - BEST PRACTICES - Percent of total best practices met by the Commission.		Approved KPM	100.00	100.00	100.00

**LFO Recommendation:**

Recommend approval of Key Performance Measures and targets as presented.

**Sub-Committee Action:**

Approve LFO recommendation.

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**Joint Committee On Ways and Means**

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**Action:** Do Pass The A-Eng Bill.

**Action Date:** 02/25/16

**Vote:**

**House**

Yeas: 11 - Buckley, Gomberg, Huffman, Komp, Nathanson, Rayfield, Read, Smith, Whisnant, Whitsett, Williamson

Exc: 1 - McLane

**Senate**

Yeas: 7 - Bates, Devlin, Johnson, Monroe, Roblan, Shields, Steiner Hayward

Nays: 4 - Girod, Hansell, Thomsen, Whitsett

Exc: 1 - Winters

**Prepared By:** Linda Ames and Theresa McHugh, Legislative Fiscal Office

**Reviewed By:** Daron Hill, Legislative Fiscal Office

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Emergency Board; Various Agencies

Biennium: 2015-17

## Budget Summary\*

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>Emergency Board</u></b>				
General Fund - General Purpose	\$ 30,000,000	\$ 32,000,000	\$ 2,000,000	6.7%
General Fund - Special Purpose Appropriations				
State Agencies for state employee compensation	\$ 120,000,000	\$ -	\$ (120,000,000)	-100.0%
State Agencies for non-state worker compensation	\$ 10,700,000	\$ 700,147	\$ (9,999,853)	-93.5%
State Agencies for education issues	\$ 3,000,000	\$ 1,626,121	\$ (1,373,879)	-45.8%
Dept. of Education - mixed delivery preschool program	\$ 17,540,357	\$ -	\$ (17,540,357)	-100.0%
HECC - college readiness program implementation	\$ 6,865,921	\$ -	\$ (6,865,921)	-100.0%
Dept. of Forestry - fire protection expenses	\$ 6,000,000	\$ 3,945,177	\$ (2,054,823)	-34.2%
Dept. of Revenue - Property Tax Division	\$ 1,836,836	\$ -	\$ (1,836,836)	-100.0%
Dept. of Corrections - Deer Ridge operations expenses	\$ -	\$ 3,000,000	\$ 3,000,000	100.0%
Dept. of Corrections - expenses related to mentally ill	\$ -	\$ 2,000,000	\$ 2,000,000	100.0%
Malheur Nat'l Wildlife Refuge expense reimbursement	\$ -	\$ 2,000,000	\$ 2,000,000	100.0%
<b><u>ADMINISTRATION PROGRAM AREA</u></b>				
<b><u>Department of Administrative Services</u></b>				
General Fund	\$ 12,468,238	\$ 16,073,778	\$ 3,605,540	28.9%
Other Funds	\$ 898,482,207	\$ 911,637,817	\$ 13,155,610	1.5%
<b><u>Advocacy Commissions Office</u></b>				
General Fund	\$ 602,262	\$ 626,557	\$ 24,295	4.0%
<b><u>Employment Relations Board</u></b>				
General Fund	\$ 2,393,033	\$ 2,460,956	\$ 67,923	2.8%
Other Funds	\$ 2,014,991	\$ 2,066,561	\$ 51,570	2.6%
<b><u>Oregon Government Ethics Commission</u></b>				
Other Funds	\$ 2,720,429	\$ 2,789,379	\$ 68,950	2.5%
<b><u>Office of the Governor</u></b>				
General Fund	\$ 12,448,211	\$ 12,773,672	\$ 325,461	2.6%
Lottery Funds	\$ 4,058,418	\$ 4,209,051	\$ 150,633	3.7%
Other Funds	\$ 3,152,058	\$ 3,249,297	\$ 97,239	3.1%

## Budget Summary\*

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>Oregon Liquor Control Commission</u></b>				
Other Funds	\$ 178,713,603	\$ 181,706,250	\$ 2,992,647	1.7%
<b><u>Public Employees Retirement System.</u></b>				
Other Funds	\$ 95,161,904	\$ 107,769,491	\$ 12,607,587	13.2%
		\$ -		
<b><u>Racing Commission</u></b>				
Other Funds	\$ 6,193,966	\$ 6,276,229	\$ 82,263	1.3%
<b><u>Department of Revenue</u></b>				
General Fund	\$ 186,702,371	\$ 193,187,720	\$ 6,485,349	3.5%
Other Funds	\$ 130,931,438	\$ 134,486,949	\$ 3,555,511	2.7%
<b><u>Secretary of State</u></b>				
General Fund	\$ 9,422,659	\$ 9,949,390	\$ 526,731	5.6%
Other Funds	\$ 54,607,321	\$ 56,279,809	\$ 1,672,488	3.1%
Federal Funds	\$ 6,242,689	\$ 6,277,676	\$ 34,987	0.6%
<b><u>State Library</u></b>				
General Fund	\$ 3,536,497	\$ 3,626,974	\$ 90,477	2.6%
Other Funds	\$ 6,227,861	\$ 6,440,443	\$ 212,582	3.4%
Federal Funds	\$ 5,061,853	\$ 5,121,642	\$ 59,789	1.2%
<b><u>State Treasurer</u></b>				
General Fund	\$ 1,658,284	\$ 1,687,988	\$ 29,704	1.8%
Other Funds	\$ 61,114,368	\$ 62,170,171	\$ 1,055,803	1.7%
<b><u>CONSUMER AND BUSINESS SERVICES PROGRAM AREA</u></b>				
<b><u>State Board of Accountancy</u></b>				
Other Funds	\$ 2,454,268	\$ 2,506,638	\$ 52,370	2.1%

## Budget Summary\*

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>Chiropractic Examiners Board</u></b>				
Other Funds	\$ 1,889,260	\$ 1,931,737	\$ 42,477	2.2%
<b><u>Consumer and Business Services</u></b>				
Other Funds	\$ 243,170,782	\$ 246,301,771	\$ 3,130,989	1.3%
Federal Funds	\$ 16,431,616	\$ 17,320,682	\$ 889,066	5.4%
<b><u>Construction Contractors Board</u></b>				
Other Funds	\$ 14,659,027	\$ 15,051,664	\$ 392,637	2.7%
<b><u>Board of Dentistry</u></b>				
Other Funds	\$ 2,985,971	\$ 3,043,804	\$ 57,833	1.9%
<b><u>Health Related Licensing Boards</u></b>				
Other Funds	\$ 5,707,058	\$ 5,876,450	\$ 169,392	3.0%
<b><u>Bureau of Labor and Industries</u></b>				
General Fund	\$ 12,563,620	\$ 12,892,771	\$ 329,151	2.6%
Other Funds	\$ 10,831,529	\$ 11,296,258	\$ 464,729	4.3%
Federal Funds	\$ 1,476,462	\$ 1,539,652	\$ 63,190	4.3%
<b><u>Licensed Professional Counselors and Therapists. Board of</u></b>				
Other Funds	\$ 1,505,938	\$ 1,540,904	\$ 34,966	2.3%
<b><u>Licensed Social Workers, Board of</u></b>				
Other Funds	\$ 1,471,646	\$ 1,500,640	\$ 28,994	2.0%
<b><u>Board of Medical Examiners</u></b>				
Other Funds	\$ 11,269,353	\$ 11,605,454	\$ 336,101	3.0%
<b><u>Board of Nursing</u></b>				
Other Funds	\$ 15,265,753	\$ 15,573,363	\$ 307,610	2.0%

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**Budget Summary\***

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>Board of Pharmacy</u></b>				
Other Funds	\$ 6,856,245	\$ 7,057,070	\$ 200,825	2.9%
<b><u>Psychologist Examiners Board</u></b>				
Other Funds	\$ 1,284,790	\$ 1,323,155	\$ 38,365	3.0%
<b><u>Public Utility Commission</u></b>				
Other Funds	\$ 44,128,339	\$ 45,429,873	\$ 1,301,534	2.9%
Federal Funds	\$ 698,049	\$ 726,238	\$ 28,189	4.0%
<b><u>Real Estate Agency</u></b>				
Other Funds	\$ 6,897,314	\$ 7,159,101	\$ 261,787	3.8%
<b><u>Tax Practitioners Board</u></b>				
Other Funds	\$ 1,235,571	\$ 1,260,908	\$ 25,337	2.1%
<b><u>ECONOMIC AND COMMUNITY DEVELOPMENT PROGRAM AREA</u></b>				
<b><u>Oregon Business Development Department</u></b>				
General Fund	\$ 16,845,486	\$ 15,565,790	\$ (1,279,696)	-7.6%
Lottery Funds	\$ 111,789,423	\$ 113,289,994	\$ 1,500,571	1.3%
Other Funds	\$ 293,644,535	\$ 295,973,576	\$ 2,329,041	0.8%
Other Funds Nonlimited	\$ 225,972,465	\$ 231,792,465	\$ 5,820,000	2.6%
Federal Funds	\$ 39,967,883	\$ 40,101,139	\$ 133,256	0.3%
<b><u>Employment Department</u></b>				
General Fund	\$ 6,112,818	\$ 6,133,655	\$ 20,837	0.3%
Other Funds	\$ 141,800,701	\$ 146,138,599	\$ 4,337,898	3.1%
Federal Funds	\$ 157,985,169	\$ 162,716,380	\$ 4,731,211	3.0%
<b><u>Housing and Community Services Department</u></b>				
General Fund	\$ 15,679,188	\$ 28,421,768	\$ 12,742,580	81.3%
Other Funds	\$ 212,088,734	\$ 223,456,192	\$ 11,367,458	5.4%
Federal Funds	\$ 119,926,854	\$ 120,114,238	\$ 187,384	0.2%

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## Budget Summary\*

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>Department of Veterans' Affairs</u></b>				
General Fund	\$ 12,748,351	\$ 13,002,777	\$ 254,426	2.0%
Other Funds	\$ 83,768,166	\$ 84,275,562	\$ 507,396	0.6%
Federal Funds	\$ 2,805,304	\$ 3,305,303	\$ 499,999	17.8%
<b><u>EDUCATION PROGRAM AREA</u></b>				
<b><u>Department of Education</u></b>				
General Fund	\$ 544,682,780	\$ 577,542,813	\$ 32,860,033	6.0%
Other Funds	\$ 273,993,743	\$ 277,228,514	\$ 3,234,771	1.2%
Federal Funds	\$ 1,026,393,576	\$ 1,038,273,634	\$ 11,880,058	1.2%
<b><u>State School Fund</u></b>				
General Fund	\$ 6,964,849,484	\$ 6,925,296,093	\$ (39,553,391)	-0.6%
Lottery Funds	\$ 408,150,516	\$ 447,703,907	\$ 39,553,391	9.7%
<b><u>Higher Education Coordinating Commission</u></b>				
General Fund	\$ 32,035,777	\$ 34,981,675	\$ 2,945,898	9.2%
Other Funds	\$ 30,509,613	\$ 31,541,490	\$ 1,031,877	3.4%
Federal Funds	\$ 111,680,983	\$ 111,923,269	\$ 242,286	0.2%
<b><u>State Support for Community Colleges</u></b>				
General Fund	\$ 589,305,847	\$ 596,555,847	\$ 7,250,000	1.2%
<b><u>State Support for Public Universities</u></b>				
General Fund	\$ 941,746,515	\$ 944,646,515	\$ 2,900,000	0.3%
<b><u>Chief Education Office</u></b>				
General Fund	\$ 6,239,594	\$ 12,857,142	\$ 6,617,548	106.1%
<b><u>Teacher Standards and Practices</u></b>				
Other Funds	\$ 6,155,894	\$ 6,511,902	\$ 356,008	5.8%

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## Budget Summary\*

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>HUMAN SERVICES PROGRAM AREA</u></b>				
<b><u>Commission for the Blind</u></b>				
General Fund	\$ 2,892,992	\$ 3,691,540	\$ 798,548	27.6%
Other Funds	\$ 992,094	\$ 1,183,539	\$ 191,445	19.3%
Federal Funds	\$ 12,319,703	\$ 15,827,037	\$ 3,507,334	28.5%
<b><u>Oregon Health Authority</u></b>				
General Fund	\$ 2,120,607,875	\$ 2,139,964,413	\$ 19,356,538	0.9%
Lottery Funds	\$ 11,292,544	\$ 11,348,753	\$ 56,209	0.5%
Other Funds	\$ 5,683,377,776	\$ 5,782,295,632	\$ 98,917,856	1.7%
Federal Funds	\$ 11,400,938,911	\$ 12,389,291,524	\$ 988,352,613	8.7%
<b><u>Department of Human Services</u></b>				
General Fund	\$ 2,700,922,689	\$ 2,765,044,703	\$ 64,122,014	2.4%
Other Funds	\$ 500,033,526	\$ 532,329,349	\$ 32,295,823	6.5%
Federal Funds	\$ 4,488,244,260	\$ 4,802,435,818	\$ 314,191,558	7.0%
<b><u>Long Term Care Ombudsman</u></b>				
General Fund	\$ 6,172,203	\$ 6,303,638	\$ 131,435	2.1%
Other Funds	\$ 719,522	\$ 737,480	\$ 17,958	2.5%
<b><u>Psychiatric Security Review Board</u></b>				
General Fund	\$ 2,604,005	\$ 2,688,017	\$ 84,012	3.2%
<b><u>JUDICIAL BRANCH</u></b>				
<b><u>Judicial Department</u></b>				
General Fund	\$ 424,653,443	\$ 433,042,702	\$ 8,389,259	2.0%
Other Funds	\$ 138,932,144	\$ 147,988,947	\$ 9,056,803	6.5%
Federal Funds	\$ 1,598,284	\$ 1,606,769	\$ 8,485	0.5%
<b><u>Commission on Judicial Fitness and Disability</u></b>				
General Fund	\$ 230,040	\$ 405,777	\$ 175,737	76.4%

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## Budget Summary\*

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>Public Defense Services Commission</u></b>				
General Fund	\$ 275,010,417	\$ 275,454,479	\$ 444,062	0.2%
Other Funds	\$ 3,833,764	\$ 3,846,904	\$ 13,140	0.3%
<b><u>LEGISLATIVE BRANCH</u></b>				
<b><u>Legislative Administration Committee</u></b>				
General Fund	\$ 34,865,791	\$ 37,515,179	\$ 2,649,388	7.6%
Other Funds	\$ 2,225,416	\$ 5,435,025	\$ 3,209,609	144.2%
<b><u>Legislative Assembly</u></b>				
General Fund	\$ 39,090,875	\$ 38,146,349	\$ (944,526)	-2.4%
Other Funds	\$ 225,352	\$ 223,530	\$ (1,822)	-0.8%
<b><u>Legislative Commission on Indian Services</u></b>				
General Fund	\$ 401,349	\$ 410,168	\$ 8,819	2.2%
<b><u>Legislative Counsel</u></b>				
General Fund	\$ 10,841,717	\$ 10,646,638	\$ (195,079)	-1.8%
Other Funds	\$ 1,515,091	\$ 1,552,105	\$ 37,014	2.4%
<b><u>Legislative Fiscal Office</u></b>				
General Fund	\$ 4,324,440	\$ 4,315,993	\$ (8,447)	-0.2%
Other Funds	\$ 3,443,858	\$ 3,530,895	\$ 87,037	2.5%
<b><u>Legislative Revenue Office</u></b>				
General Fund	\$ 2,414,923	\$ 2,496,087	\$ 81,164	3.4%
<b><u>NATURAL RESOURCES PROGRAM AREA</u></b>				
<b><u>State Department of Agriculture</u></b>				
General Fund	\$ 23,396,301	\$ 24,613,559	\$ 1,217,258	5.2%
Lottery Funds	\$ 6,289,958	\$ 6,491,591	\$ 201,633	3.2%
Other Funds	\$ 60,578,804	\$ 62,478,730	\$ 1,899,926	3.1%
Federal Funds	\$ 15,563,845	\$ 17,630,167	\$ 2,066,322	13.3%

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## Budget Summary\*

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>Columbia River Gorge Commission</u></b>				
General Fund	\$ 903,983	\$ 915,291	\$ 11,308	1.3%
Other Funds	\$ 5,000	\$ -	\$ (5,000)	-100.0%
<b><u>State Department of Energy</u></b>				
Other Funds	\$ 34,288,279	\$ 35,076,986	\$ 788,707	2.3%
Federal Funds	\$ 3,128,423	\$ 3,187,299	\$ 58,876	1.9%
<b><u>Department of Environmental Quality</u></b>				
General Fund	\$ 33,948,448	\$ 37,732,047	\$ 3,783,599	11.1%
Lottery Funds	\$ 3,945,160	\$ 4,084,177	\$ 139,017	3.5%
Other Funds	\$ 149,103,999	\$ 152,995,169	\$ 3,891,170	2.6%
Federal Funds	\$ 28,970,775	\$ 29,567,515	\$ 596,740	2.1%
<b><u>State Department of Fish and Wildlife</u></b>				
General Fund	\$ 30,081,289	\$ 31,046,604	\$ 965,315	3.2%
Lottery Funds	\$ 4,752,746	\$ 4,917,581	\$ 164,835	3.5%
Other Funds	\$ 174,604,641	\$ 178,016,434	\$ 3,411,793	2.0%
Federal Funds	\$ 138,976,588	\$ 142,316,627	\$ 3,340,039	2.4%
<b><u>Department of Forestry</u></b>				
General Fund	\$ 63,414,691	\$ 88,388,302	\$ 24,973,611	39.4%
Lottery Funds	\$ 7,481,960	\$ 7,554,096	\$ 72,136	1.0%
Other Funds	\$ 224,734,577	\$ 286,598,792	\$ 61,864,215	27.5%
Federal Funds	\$ 34,758,694	\$ 35,063,741	\$ 305,047	0.9%
<b><u>Department of Geology and Mineral Industries</u></b>				
General Fund	\$ 4,138,836	\$ 4,246,695	\$ 107,859	2.6%
Other Funds	\$ 6,092,210	\$ 6,207,283	\$ 115,073	1.9%
Federal Funds	\$ 5,356,535	\$ 5,465,149	\$ 108,614	2.0%

## Budget Summary\*

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>Department of Land Conservation and Development</u></b>				
General Fund	\$ 13,152,774	\$ 13,483,719	\$ 330,945	2.5%
Other Funds	\$ 484,999	\$ 725,419	\$ 240,420	49.6%
Federal Funds	\$ 6,254,991	\$ 6,392,432	\$ 137,441	2.2%
<b><u>Land Use Board of Appeals</u></b>				
General Fund	\$ 1,772,887	\$ 1,817,836	\$ 44,949	2.5%
<b><u>Oregon Marine Board</u></b>				
Other Funds	\$ 26,181,068	\$ 26,498,709	\$ 317,641	1.2%
Federal Funds	\$ 7,464,524	\$ 7,467,774	\$ 3,250	0.0%
<b><u>Department of Parks and Recreation</u></b>				
Lottery Funds	\$ 81,406,896	\$ 82,917,301	\$ 1,510,405	1.9%
Other Funds	\$ 108,236,201	\$ 110,367,264	\$ 2,131,063	2.0%
Federal Funds	\$ 12,306,810	\$ 12,345,047	\$ 38,237	0.3%
<b><u>Department of State Lands</u></b>				
General Fund	\$ 328,228	\$ 346,082	\$ 17,854	5.4%
Other Funds	\$ 35,792,955	\$ 36,617,973	\$ 825,018	2.3%
Federal Funds	\$ 1,795,917	\$ 2,067,484	\$ 271,567	15.1%
<b><u>Water Resources Department</u></b>				
General Fund	\$ 29,622,753	\$ 31,160,564	\$ 1,537,811	5.2%
Other Funds	\$ 73,945,808	\$ 74,253,832	\$ 308,024	0.4%
Federal Funds	\$ 1,302,403	\$ 1,312,338	\$ 9,935	0.8%
<b><u>Watershed Enhancement Board</u></b>				
Lottery Funds	\$ 62,250,303	\$ 62,482,687	\$ 232,384	0.4%
Other Funds	\$ 3,545,968	\$ 3,553,093	\$ 7,125	0.2%
Federal Funds	\$ 37,179,454	\$ 37,274,113	\$ 94,659	0.3%

# Budget Summary\*

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>PUBLIC SAFETY PROGRAM AREA</u></b>				
<b><u>Department of Corrections</u></b>				
General Fund	\$ 1,555,904,536	\$ 1,593,133,894	\$ 37,229,358	2.4%
Other Funds	\$ 53,232,352	\$ 55,776,993	\$ 2,544,641	4.8%
<b><u>Oregon Criminal Justice Commission</u></b>				
General Fund	\$ 55,035,612	\$ 55,130,454	\$ 94,842	0.2%
Other Funds	\$ 494,015	\$ 864,015	\$ 370,000	74.9%
Federal Funds	\$ 7,304,929	\$ 6,937,604	\$ (367,325)	-5.0%
<b><u>District Attorneys and their Deputies</u></b>				
General Fund	\$ 11,610,450	\$ 11,868,624	\$ 258,174	2.2%
<b><u>Department of Justice</u></b>				
General Fund	\$ 76,083,264	\$ 78,841,305	\$ 2,758,041	3.6%
Other Funds	\$ 284,955,845	\$ 295,519,057	\$ 10,563,212	3.7%
Federal Funds	\$ 142,401,423	\$ 157,871,008	\$ 15,469,585	10.9%
<b><u>Oregon Military Department</u></b>				
General Fund	\$ 25,019,969	\$ 25,350,514	\$ 330,545	1.3%
Other Funds	\$ 110,312,549	\$ 113,312,859	\$ 3,000,310	2.7%
Federal Funds	\$ 278,357,971	\$ 280,784,232	\$ 2,426,261	0.9%
<b><u>Oregon Board of Parole</u></b>				
General Fund	\$ 7,807,978	\$ 8,040,916	\$ 232,938	3.0%
<b><u>Oregon State Police</u></b>				
General Fund	\$ 271,442,947	\$ 279,647,826	\$ 8,204,879	3.0%
Lottery Funds	\$ 7,841,010	\$ 8,010,065	\$ 169,055	2.2%
Other Funds	\$ 100,483,764	\$ 109,285,417	\$ 8,801,653	8.8%
Federal Funds	\$ 9,760,242	\$ 9,780,941	\$ 20,699	0.2%
<b><u>Department of Public Safety Standards and Training</u></b>				
Other Funds	\$ 37,238,170	\$ 42,092,883	\$ 4,854,713	13.0%
Federal Funds	\$ 4,148,299	\$ 6,666,167	\$ 2,517,868	60.7%

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**Budget Summary\***

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			\$ Change	% Change
<b><u>Oregon Youth Authority</u></b>				
General Fund	\$ 291,989,720	\$ 298,387,030	\$ 6,397,310	2.2%
Other Funds	\$ 63,325,954	\$ 63,399,605	\$ 73,651	0.1%
Federal Funds	\$ 36,097,766	\$ 36,316,493	\$ 218,727	0.6%
<b><u>TRANSPORTATION PROGRAM AREA</u></b>				
<b><u>Department of Aviation</u></b>				
Other Funds	\$ 11,979,625	\$ 12,370,913	\$ 391,288	3.3%
Federal Funds	\$ 8,504,014	\$ 8,514,798	\$ 10,784	0.1%
<b><u>Department of Transportation</u></b>				
General Fund	\$ 27,827,995	\$ 22,585,257	\$ (5,242,738)	-18.8%
Other Funds	\$ 3,275,943,658	\$ 3,313,477,220	\$ 37,533,562	1.1%
Federal Funds	\$ 110,110,886	\$ 110,175,491	\$ 64,605	0.1%
<b>2015-17 Budget Summary</b>				
<b>General Fund Total</b>	\$ 17,716,499,549	\$ 17,780,417,528	\$ 63,917,979	0.4%
<b>Lottery Funds Total</b>	\$ 709,258,934	\$ 753,009,203	\$ 43,750,269	6.2%
<b>Other Funds Total</b>	\$ 14,023,753,360	\$ 14,377,069,073	\$ 353,315,713	2.5%
<b>Other Funds Nonlimited Total</b>	\$ 225,972,465	\$ 231,792,465	\$ 5,820,000	2.6%
<b>Federal Funds Total</b>	\$ 18,281,516,085	\$ 19,633,717,421	\$ 1,352,201,336	7.4%

\* Excludes Capital Construction

Position Summary	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			Change	% Change
<b>ADMINISTRATION PROGRAM AREA</b>				
<b><u>Department of Administrative Services</u></b>				
Authorized Positions	827	841	14	1.7%
Full-time Equivalent (FTE) positions	813.17	826.40	13.23	1.6%
<b><u>Oregon Liquor Control Commission</u></b>				
Authorized Positions	261	268	7	2.7%
Full-time Equivalent (FTE) positions	251.16	255.33	4.17	1.7%
<b><u>Department of Revenue</u></b>				
Authorized Positions	1,082	1,087	5	0.5%
Full-time Equivalent (FTE) positions	1,012.41	1,020.68	8.27	0.8%
<b><u>Secretary of State</u></b>				
Authorized Positions	212	213	1	0.5%
Full-time Equivalent (FTE) positions	210.71	210.96	0.25	0.1%
<b>CONSUMER AND BUSINESS SERVICES PROGRAM AREA</b>				
<b><u>Consumer and Business Services</u></b>				
Authorized Positions	962	960	(2)	-0.2%
Full-time Equivalent (FTE) positions	952.57	952.76	0.19	0.0%
<b><u>Public Utility Commission</u></b>				
Authorized Positions	128	129	1	0.8%
Full-time Equivalent (FTE) positions	125.97	126.60	0.63	0.5%
<b>ECONOMIC AND COMMUNITY DEVELOPMENT PROGRAM AREA</b>				
<b><u>Oregon Business Development Department</u></b>				
Authorized Positions	137	139	2	1.5%
Full-time Equivalent (FTE) positions	134.74	135.74	1.00	0.7%

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## Position Summary

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			Change	% Change
<b>EDUCATION PROGRAM AREA</b>				
<b><u>Chief Education Office</u></b>				
Authorized Positions	17	20	3	17.6%
Full-time Equivalent (FTE) positions	14.64	18.25	3.61	24.7%
<b><u>Department of Education</u></b>				
Authorized Positions	552	555	3	0.5%
Full-time Equivalent (FTE) positions	519.01	520.90	1.89	0.4%
<b>HUMAN SERVICES PROGRAM AREA</b>				
<b><u>Oregon Health Authority</u></b>				
Authorized Positions	4,428	4,449	21	0.5%
Full-time Equivalent (FTE) positions	4,361.01	4,383.89	22.88	0.5%
<b><u>Department of Human Services</u></b>				
Authorized Positions	8,038	8,054	16	0.2%
Full-time Equivalent (FTE) positions	7,897.81	7,905.04	7.23	0.1%
<b>NATURAL RESOURCES PROGRAM AREA</b>				
<b><u>Department of Environmental Quality</u></b>				
Authorized Positions	739	752	13	1.8%
Full-time Equivalent (FTE) positions	722.57	730.15	7.58	1.0%
<b><u>Department of Fish and Wildlife</u></b>				
Authorized Positions	1,474	1,474	-	0.0%
Full-time Equivalent (FTE) positions	1,198.26	1,199.26	1.00	0.1%
<b><u>Department of Forestry</u></b>				
Authorized Positions	1,197	1,201	4	0.3%
Full-time Equivalent (FTE) positions	875.54	878.04	2.50	0.3%

## Position Summary

	2015-17 Legislatively Approved Budget	2016 Committee Recommendation	Committee Change from 2015-17 Leg. Approved	
			Change	% Change
<b><u>Department of Land Conservation and Development</u></b>				
Authorized Positions	57	58	1	1.8%
Full-time Equivalent (FTE) positions	55.90	56.57	0.67	1.2%
<b><u>Water Resources Department</u></b>				
Authorized Positions	164	165	1	0.6%
Full-time Equivalent (FTE) positions	162.58	163.25	0.67	0.4%
<b>PUBLIC SAFETY PROGRAM AREA</b>				
<b><u>Department of Corrections</u></b>				
Authorized Positions	4,523	4,534	11	0.2%
Full-time Equivalent (FTE) positions	4,479.62	4,487.41	7.79	0.2%
<b><u>Department of Justice</u></b>				
Authorized Positions	1,305	1,324	19	1.5%
Full-time Equivalent (FTE) positions	1,291.70	1,298.27	6.57	0.5%
<b><u>Oregon State Police</u></b>				
Authorized Positions	1,287	1,299	12	0.9%
Full-time Equivalent (FTE) positions	1,255.24	1,261.87	6.63	0.5%
<b><u>Department of Public Safety Standards and Training</u></b>				
Authorized Positions	28	43	15	53.6%
Full-time Equivalent (FTE) positions	26.00	35.74	9.74	37.5%

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## **Summary of Revenue Changes**

The General Fund appropriations made in the bill are within resources available as projected in the February 2016 economic and revenue forecast by the Department of administrative Services Office of Economic Analysis.

## **Summary of Capital Construction Subcommittee Action**

Senate Bill 5701 is the omnibus budget reconciliation bill for the 2016 legislative session, implementing the statewide rebalance plan that addresses changes in projected revenues and expenditures since the close of the 2015 session. The Subcommittee approved Senate Bill 5701 with amendments to reflect budget adjustments as described below.

## **Statewide Adjustments**

### **EMPLOYEE COMPENSATION DISTRIBUTION**

The Subcommittee approved allocation of \$120 million General Fund to state agencies for employee compensation. The General Fund appropriation is expected to cover about 93% of the statewide estimate of costs for compensation and benefit changes agreed to through collective bargaining or other salary agreements. Total compensation adjustments include \$120 million General Fund, \$3.2 million Lottery Funds, \$111.7 Other Funds, and \$55.9 million Federal Funds. Lottery Funds, Other Funds, and Federal Funds expenditure limitations are calculated at fully-funded amounts.

### **OTHER STATEWIDE ADJUSTMENTS**

Other statewide adjustments include adjustments for Pension Obligation Bond (POB) payments and fully funding the General Fund need of employee compensation for small agencies. POB adjustments generated a net savings of \$4.3 million Total Funds, including General Fund savings of \$487,281. A portion of the savings was used to fully fund the General Fund collective bargaining agreement costs (\$243,932) of small agencies.

Section 116 of the budget bill reflects the changes, as described above, for each agency. These adjustments are not addressed in the agency narratives, although they are included in the table at the beginning of the budget report.

## **Emergency Board**

As part of the 2015-17 biennium statewide rebalance plan, Senate Bill 5701 adjusts the Emergency Board's general purpose and special purpose appropriations as described as follows:

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- Increases the General Purpose Emergency Fund by \$2,000,000 for general governmental purposes, increasing the total amount available to the Emergency Board for the remainder of the 2015-17 interim to \$32,000,000.
- Eliminates a special purpose appropriation for state agencies of \$120 million, and makes corresponding General Fund appropriations to various state agencies for state employee compensation changes.
- Reduces the special purpose appropriation for state agencies of \$10.7 million, with General Fund appropriations of \$10.0 million to the Department of Human Services (\$9,502,291) and the Oregon Health Authority (\$497,562) for compensation changes driven by collective bargaining for workers who are not state employees.
- Reduces the \$3,000,000 special purpose appropriation for education by \$1,373,879 and uses these funds as part of the \$1,900,000 General Fund appropriation to the Higher Education Coordinating Commission to help fund 2015-17 compensation agreements for classified staff at Portland State University, Eastern Oregon University, Southern Oregon University, Western Oregon University, and the Oregon Institute of Technology. Details on how much each university receives is found under the Higher Education Coordinating Commission section of this budget report.
- Eliminates the \$17,540,357 General Fund special purpose appropriation to the Emergency Board for the mixed delivery preschool program established in House Bill 3380 (2015), with a corresponding appropriation to the Oregon Department of Education for the same purpose.
- Eliminates a \$6,865,921 special purpose appropriation for college readiness and appropriates most of these resources to the Oregon Department of Education, Chief Education Office, and the Higher Education Coordinating Commission for transitional services and supports, between secondary and post-secondary education.
- Reduces the special purpose appropriation of \$6 million for fire costs, and appropriates \$2,054,823 to the Department of Forestry for that purpose.
- Eliminates the \$1.8 million special purpose appropriation for the Department of Revenue and appropriates \$1,360,125 to the Property Tax Division of the Department of Revenue, primarily due to cover a revenue shortfall in the County Assessment Function Funding Assistance Account.
- Establishes a \$3,000,000 special purpose appropriation to be allocated to the Department of Corrections for operations support. The Department may request funds to finance continued activation of minimum security beds at the Deer Ridge Correctional Institution.
- Establishes a \$2,000,000 special purpose appropriation to be allocated to the Department of Corrections. The Department may request funds to finance continued activities and positions associated with improvements to housing and treatment for the seriously mentally ill.
- Establishes a special purpose appropriation for the Emergency Board of \$2,000,000 to be allocated to state and local governments that incurred costs not reimbursed by the federal government related to the armed occupation of the Malheur National Wildlife Refuge. The Department of Administrative Services and the Legislative Fiscal Office are directed to work with state and local government units to identify and validate reimbursable costs related to the incident.

## Adjustments to 2015-17 Agency Budgets

### ADMINISTRATION

#### Department of Administrative Services

The Subcommittee approved a technical adjustment to move Other Funds expenditure limitation, intended to pay for treasury fees that had been spread to programs in the 2015-17 legislatively adopted budget, back into the Other Funds expenditure limitation established in Senate Bill 5502 for Treasury Fees. These adjustments net to a zero overall change in the total Other Funds budget approved for the Department of Administrative Services (DAS).

The Subcommittee approved a number of budget adjustments related to a multi-part reorganization of DAS and the Oregon State Chief Information Officer (OSCIO) information technology (IT) related functions. A budget note required DAS to report on proposed changes to operations and rates for Enterprise Technology Services (ETS), which includes the state data center. During the 2015 session, the Legislature also passed House Bill 3099, which transferred substantial authority and responsibility surrounding statewide IT operations and policies from the DAS Director to the OSCIO. To implement House Bill 3099, the OSCIO has proposed significant changes in organizational structures. Under this reorganization there will be five sections: ETS; Enterprise Security Office; Office of Strategic IT Governance; Enterprise Shared Services; and the DAS Chief Information Office (CIO), which will be responsible for meeting DAS's IT needs, such as help desk support. While the DAS CIO will remain under the authority of the OSCIO, it will report to the DAS Deputy Chief Operating Officer. In addition, three administrative positions that did budget work in ETS were transferred to DAS Business Services and seven other ETS administrative positions were moved to the CIO.

The budget adjustments required to implement the IT reorganization and new OSCIO responsibilities, as well as to address the ETS budget note, affected a number of DAS program areas. These net adjustments by program area include: ETS decreased Other Funds by \$39,863,385 and 70 positions (64.00 FTE); CIO increased Other Funds by \$29,841,240 and 37 positions (34.06 FTE); Chief Operating Office increased Other Funds by \$12,171,544 and 38 positions (37.58 FTE); DAS Business Services increased Other Funds by \$644,351 and 3 positions (3.00 FTE); and Enterprise Goods and Services increased Other Funds by \$474,682 and 4 positions (2.32 FTE).

As part of the IT reorganization, a new structure was proposed for IT procurement and vendor management with dual responsibility between Enterprise Goods and Services and OSCIO. This new structure was reviewed by the Joint Committee on Ways and Means as well as the Joint Legislative Committee on Information Management and Technology (JLCIMT). The JLCIMT recommended conditional, temporary approval of the request for the remainder of the biennium. Specifically, the JLCIMT recommended that DAS and OSCIO:

1. Conduct an assessment to identify and evaluate the alternative State IT procurement-related organizational/operating models in use by other states across the nation. The assessment report should provide the raw findings and include, but not be limited to, the roles, responsibilities, accountability, staffing levels, and costs associated with:
  - (a) The most predominant organizational/operating models in use across the nation as compared to the shared IT vendor management program proposed within this request, and

- (b) A full transfer of state IT procurement duties, functions, and powers from DAS and the DAS Director to the State Chief Information Officer.
2. Submit the assessment report and a status report on IT vendor management program progress to date to the Legislative Fiscal Office in November 2016.
3. Jointly present the assessment report and status report on IT vendor management program progress to the JLCIMT and the Emergency Board during the December 2016 Legislative Days.

The Subcommittee approved six new positions associated with the new IT vendor management arrangement as limited duration to ensure the new arrangement was temporary and that DAS/OSCIO would need to return to the Legislature for funding for the 2017-19 biennium.

Other Funds expenditure limitation established in Senate Bill 55 (2015) was reduced by \$196,206 and the three positions established by the bill were reduced by a combined 0.99 FTE due to delays in implementing the legislation. None of the three positions will be hired until after the 2016 legislative session.

The Subcommittee also added two limited duration positions to implement House Bill 4135 to accomplish the coordination requirements and manage the production of electronic records as directed by the bill. An Information Systems Specialist 8 position (0.63 FTE) was added to provide the initial outreach, education, and coordination of the new policies with state agencies. An Operations and Policy Analyst 2 (0.63 FTE) was added to handle the query writing and production of records for DAS and to assist agencies in the querying and production of their records. The positions are added as limited duration to allow DAS to assess appropriate work load and classification. Positions needed to manage ongoing work will be proposed as part of the Governor's Budget for 2017-19. The Subcommittee determined that DAS can pay for the two positions in 2015-17 with existing Other Funds expenditure limitation and revenue.

The Subcommittee also approved one-time General Fund appropriations to DAS for the following purposes:

- \$1,000,000 for disbursement to the Holly Theater in Medford for the Holly Theater Restoration Project.
- \$650,000 for disbursement to the Salem Area Mass Transit District to provide free bus passes to state employees working in the Capitol Mall area and to operate an Airport Road Express Shuttle between the State Motor Pool and the Capitol Mall.
- \$500,000 for disbursement to Clackamas County for repairs at the Willamette Falls Locks and Canal.
- \$500,000 for disbursement to the City of Cornelius to help build the multi-use Cornelius Place project which includes a library, low income senior housing, and a YMCA.
- \$300,000 for disbursement to Verde for the Cully Park project in Northeast Portland's Cully neighborhood.
- \$250,000 for disbursement to Worksystems Inc. to recapitalize a tuition loan program first funded in 2011 for loans to students participating in commercial driver license training. These loans are not part of a state program and funding is provided only to establish the private program. This is the second one-time General Fund appropriation made for this purpose; the same entity received a one-time grant of \$400,000 for this purpose in 2011.
- \$200,000 for disbursement to Douglas County to partially reimburse public safety costs associated with the October 1, 2015 incident at Umpqua Community College.



- \$200,000 for disbursement to Portland Playhouse for renovation and restoration of Portland Playhouse's theater in Portland's King neighborhood.

The Subcommittee added \$3,059,680 Other Funds expenditure limitation for one-time costs of issuance and special payments associated with the disbursement of proceeds from the sale of \$3,000,000 in lottery bonds for the City of Warrenton to rebuild a dock used by Pacific Seafood at the site of a seafood processing facility that burned down in June 2013. The processing facility was built in 1941 and acquired, along with the dock, by Pacific Seafood in 1983. The lottery bonds are approved in House Bill 5201. There is no debt service allocated in the 2015-17 biennium, as the bonds will not be sold until the spring of 2017. Debt service for 2017-19 is estimated at \$675,152 Lottery Funds. The Subcommittee also increased Other Funds expenditure limitation by \$55,000 to pay the cost of issuing \$2,500,000 Article XI-Q bonds for repairs and improvements at the Oregon State Fair.

Other Funds limitation was increased by \$453,681 to allow planning for the Human Resources Information System (HRIS) replacement project to continue through May 2016. DAS is to bring any request for additional funding needed to complete stage gate 3 planning through the end of the current biennium to the May 2016 meeting of the Emergency Board. In addition, DAS shall bring a plan to adjust rates and assessment charges for the second year of the biennium to fund both the HRIS planning project and new positions established as a part of the IT reorganization operationalized in Senate Bill 5701. A \$6,500,000 General Fund special purpose appropriation to the Emergency Board for this purpose may be allocated to pay General Fund increases associated with assessment and rate increases.

#### **Oregon Liquor Control Commission**

The Subcommittee approved an Other Funds expenditure limitation in the amount of \$1,117,762 for the Oregon Liquor Control Commission to implement the provisions of House Bill 4014, Senate Bill 1511, and Senate Bill 1598. Three permanent regulatory specialist positions and four permanent administrative specialist positions are anticipated to be needed due to an increase in the assumed number of licensees as medical marijuana producers are authorized to transfer excess marijuana to recreational retail outlets, and to cover costs associated with the additional number of people working in the marijuana industry that will be required to have work permits and training. Services and supplies expenditures include \$350,000 for updates to the agency's "What's Legal" public information platform and associated outreach. Of the total amount, \$350,665 Other Funds expenditure limitation is for costs associated with Senate Bill 1598; if that bill is not enacted, this expenditure limitation is to be unscheduled by the Department of Administrative Services Chief Financial Office.

A technical adjustment was approved to convert four limited duration liquor regulatory specialists approved as part of House Bill 5047 to permanent status. This adjustment will have no effect on expenditure limitation in the 2015-17 biennium.

#### **Public Employees Retirement System**

The Subcommittee increased expenditure limitation for the Financial and Administrative Services Division by \$100,000 Other Funds for a shortfall in the Secretary of State audit charges assessment budget. In addition, increased expenditure limitation in the amount of \$6,601,170 Other Funds was approved for the Financial and Administrative Services Division for the Office of the State Chief Information Officer Enterprise Technology Services assessment.

The Subcommittee approved a one-time increase in Other Funds expenditure limitation of \$1,255,601 for the Public Employees Retirement System (PERS) Individual Account Program (IAP) information technology project. In addition, the Department of Administrative Services is to schedule all currently unscheduled Other Funds expenditure limitation for the project. The project is to move the administration of the IAP from a third-party administrator to the agency. A re-baselining of the project shows that initial project development costs have increased from \$2.9 million to \$6.1 million. The agency anticipates requesting an estimated \$1.9 million during the 2017-19 biennium to complete project development. The Joint Legislative Committee on Information Management and Technology (JLCIMT) recommendations were also approved.

A one-time increase in Other Funds expenditure limitation of \$1,659,976 was approved for information technology enhancements to the jClarety retirement system. JLCIMT recommendations were also approved. The Subcommittee directed the Department of Administrative Services to un-schedule the entire \$1.7 million until the conditions set forth by JLCIMT are satisfied.

### **Department of Revenue**

The Subcommittee reduced the expenditure limitation for the Core Systems Replacement project by \$500,000 Other Funds (recreational marijuana tax proceeds) to account for contract savings for the recreational marijuana module. The original development cost was estimated at \$1 million in House Bill 5047 (2015).

Other Funds expenditure limitation for the Property Tax Division was reduced by \$500,000 because the limitation is in excess of the operational needs of the program and is without an underlying revenue source.

The Subcommittee approved a \$373,841 General Fund reduction and a reduction of 2.60 FTE for the Senior Citizens' and Disabled Citizens' Property Tax Deferral program. This technical adjustment will have no impact on the program, which is statutorily funded with Other Funds (Senior and Disabled Property Tax Deferral account). This is part of an effort to better align the agency's budget with actual program funding.

The General Fund appropriation for the Property Tax Division was increased by \$1.4 million in personal services and FTE on existing positions was increased by 7.20. This appropriation is to backfill Other Funds revenue shortfalls in the County Assessment Function Funding Assistance Account, but only for Department of Revenue Valuation Section (\$1.1 million), and for a reduction in county contract mapping services (\$240,986). A \$1.8 million reduction in Other Funds expenditure limitation was previously included in the agency's legislatively adopted budget. The 2017-19 biennial cost is estimated to be \$1.9 million General Fund.

The Subcommittee approved an increase of \$2,052,807 in Other Funds expenditure limitation (recreational marijuana tax) and the establishment of four permanent full-time Accounting Technician 2 positions (2.92 FTE) and one limited duration Principal Executive Manager B position (0.75 FTE) for the recreational marijuana program. In addition, an Economist 3 position, approved as part of House Bill 5047 (2015), is moved from permanent full-time to limited duration. Personal services costs total \$481,063, with \$653,792 in services and supplies and \$917,952 in capital outlay. Of the \$2.1 million expenditure limitation, \$633,920 is one-time limitation for program start-up and facility construction costs. The 2017-19 biennial cost is estimated to be \$1.4 million Other Funds. This request is for the processing of cash payments related to the recreational marijuana program; however, the Subcommittee's expectation is that this is to be done in an integrated fashion with the agency's current banking, Electronic Funds Transfer, and miscellaneous cash receipting of non-recreational marijuana taxes.



The Subcommittee approved an increase in Other Funds expenditure limitation of \$874,747 for the Core Systems Replacement project. It was estimated that there were \$6.9 million in bond proceeds for the project carried forward from the 2013-15 biennium; however, that figure was only recently revised to \$7,804,187. The Department of Administrative Services is directed to unschedule the entire \$874,747 pending the review and approval of the need for the expenditure limitation by the Legislative Fiscal Office.

#### **Secretary of State**

The Subcommittee established a \$347,900 General Fund appropriation and one limited-duration position (0.25 FTE) to replace the Oregon Elections System for Tracking and Reporting (ORESTAR) Election Night Reporting module. The agency will use the funds to acquire a commercially-available off-the-shelf (COTS) product to replace an existing ORESTAR Election Night Reporting module that was developed in-house. The replacement system will offer expanded capabilities, including tabulation of local election vote counts and graphical and map-based display capabilities. A temporary project manager position was approved. The new system is expected to be fully operational in time for the 2016 General Election. The appropriation is approved on a one-time basis and will be phased out in the agency's 2017-19 biennium budget.

#### **State Treasurer**

The Subcommittee reduced Other Funds expenditure limitation for the Debt Management Division by \$500,000 for a Rockefeller Foundation grant that the agency no longer receives.

### **CONSUMER AND BUSINESS SERVICES**

#### **Department of Consumer and Business Services**

The Subcommittee approved an increase in the Other Funds limitation for the reclassification of positions in three divisions. The individual changes impacted ten positions. The adjustments included increased Other Funds expenditure limitation of \$32,660 in the Building Codes Division, \$30,878 in the Workers' Compensation Division, and \$108,488 in the Insurance Division, for a total of \$172,026. The additional expenditure limitation allows the agency to make position adjustments as approved by the Office of the Chief Human Resources Officer at the Department of Administrative Services without compromising the maintenance of the agency's ratio of supervisory to non-supervisory positions, as required under House Bill 4131 (2012).

The Subcommittee approved an increase in the Other Funds expenditure limitation of \$379,219 for the establishment of four new positions (2.52 FTE) in the Building Codes Division. These positions include a Plans Examiner 2 position to be housed in Salem and three Inspector positions (Mechanical, Plumbing, and Electrical) to be housed at the Eastern Region Office located in Pendleton. The positions will address ongoing workload increases of the Building Codes Division as the economy continues to recover.

A net decrease in Other Funds expenditure limitation of \$321,655 was made as a result of position adjustments in the Marketplace and Shared Services Divisions related to the operation of the Health Insurance Marketplace. Thirteen limited duration Program Analyst 2 positions were eliminated (-7.52 FTE) and six permanent, full-time positions (4.02 FTE) were established (one Outreach and Education Manager and five Program Analyst 2 positions). These changes result in a reduction of seven positions and \$558,617 Other Funds expenditure limitation in the

Marketplace Division. This reduction was partially offset by an increase in Other Funds expenditure limitation of \$236,962 in the Shared Services Division to cover the costs of converting one part-time, limited duration Operations and Policy Analyst 4 position to a full-time, permanent position (0.50 FTE) and to add an additional Procurement and Contract Specialist 3 position (0.67 FTE).

The Subcommittee approved a \$6.4 million reduction in Other Funds expenditure limitation in order to reconcile the budget of the Health Insurance Marketplace with actual and anticipated expenditures of the program, which have been significantly different than what was anticipated in the legislatively adopted budget. The changes include reductions in anticipated expenditures due to pre-payment of contracts prior to the transfer of the insurance marketplace from Cover Oregon to the Department of Consumer and Business Services (DCBS), changes in information technology contracts, lower than anticipated personal services costs, and a reduction in anticipated payments for tax reporting errors. These reductions are partially offset by increases in legal fees and new information technology contracts.

A \$1,732,528 Other Funds expenditure limitation increase was approved for additional marketing and outreach activities of the Oregon Health Insurance Marketplace. This additional expenditure limitation will be unscheduled until DCBS completes its review and analysis of the 2016 open enrollment year campaign and its plan for the 2017 open enrollment year campaign. The legislatively adopted budget included a budget note instructing the agency to complete a plan and report on each of the publicity and publication campaigns either upcoming or implemented for the Health Insurance Marketplace Program. DCBS submitted a publicity and publication plan and report to the Interim Joint Committee on Ways and Means in January 2015; however, that plan and report did not contain detailed information for the 2017 open enrollment year campaign since the agency had not yet completed its review of the 2016 plan. The additional funding, once rescheduled, will allow the agency to maintain the same level of expenditures during the 2017 open enrollment year as in 2016.

Discussions also took place regarding pharmacy benefit managers. The Subcommittee approved the following budget note.

**Budget Note:**

The purpose of this budget note is to clarify the Department of Consumer and Business Services' (DCBS) authority to regulate pharmacy benefit managers (PBMs). DCBS is directed to convene a workgroup to develop recommendations for rulemaking regarding PBM compliance. Based on those recommendations, the agency will draft rules regarding PBM compliance and report to the appropriate legislative policy committees by November 1, 2016. The report should include the draft rules, as well as any statutory changes or clarifications necessary to fully implement the draft rules, including fee recommendations for administration of the program.

Draft rules must include, but are not limited to:

- Notification system that includes a method for informing PBMs of new regulations, and for informing PBMs of complaints, investigations, and possible sanctions
- Investigation procedures
- Fees, fines, and resolution process that includes:
  - Overall schedule of fees and fines
  - Provisions for warnings before fines, based on circumstances

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- Possible escalation of fine for multiple occurrences including combining multiple occurrences into a single complaint or enforcement action, or multiple claims related to a single reason or cause
- Setting a maximum annual per PBM fine
- Exceptions based on type of violation or other criteria
- A reasonable time to re-enter compliance
- Other provisions consistent with DCBS' existing enforcement authority and procedures

### **Bureau of Labor and Industries**

Technical adjustments are included to reflect the budget recommended to the Joint Committee on Ways and Means by the Transportation and Economic Development Subcommittee during the 2015 regular session. Multiple amendments to Senate Bill 5517 were considered during the legislative review process, and the amendment that was submitted to and adopted by the Joint Committee on Ways and Means did not properly reflect the budget recommended by the Subcommittee. The adjustments reduce the General Fund appropriation to the agency by \$113,604, increase Other Funds expenditure limitation by \$206,871, and increase Federal Funds expenditure limitation by \$2,696, for a total funds adjustment of \$95,963.

### **Oregon Public Utility Commission**

The Subcommittee increased the agency's Other Funds expenditure limitation by \$170,226 and authorized one permanent position (0.63 FTE) to increase analytic capacity to address additional agency responsibilities resulting from legislative changes to the Renewable Portfolio Standard made during the 2016 Legislative session.

## **ECONOMIC AND COMMUNITY DEVELOPMENT**

### **Oregon Business Development Department**

The Subcommittee reduced the General Fund appropriation for debt service by \$1,328,407, and established a \$1,330,500 Other Funds expenditure limitation for general obligation bond debt service. Debt service for general obligation bonds is paid by the General Fund; however, the agency will substitute \$1,330,500 of Article XI-M and Article XI-N bond proceeds, and interest earned on those proceeds, to pay debt service, in lieu of General Fund. The proceeds are from bonds originally issued for the Seismic Rehabilitation Grant program in 2010, 2011, and 2012. These proceeds were not used for seismic projects and will instead be used to offset debt service costs in the current biennium.

The Subcommittee increased Lottery Funds support by \$1.5 million. This includes an increase for employee compensation changes and \$960,514 Lottery Funds, approved on a one-time basis, for new or expanded programs. The Subcommittee increased Lottery Funds support for the Oregon Wave Energy Trust by \$200,000, bringing current-biennium support to \$450,000 Lottery Funds. Lottery Funds were increased by \$400,000 to reapprove funding for replacement of the Port of Port Orford Cannery Building for one more biennium. Funding for this project was initially approved in the 2013-15 biennium. The Subcommittee also approved \$100,000 of Lottery Funds to conduct a Willamette Valley Intermodal Hub Feasibility Study, to evaluate the viability of a strategic intermodal hub to optimize container shipment of Oregon agricultural products.

Lottery Funds totaling \$260,514 and two positions (1.00 FTE) were approved to address administrative costs associated with the expansion of grant activity in the Seismic Rehabilitation Grant Program. The Department will need to fill the newly-established positions for three years beginning July 1, 2016, and will include a policy option package in its 2017-19 biennium budget request to convert the two approved positions from permanent to limited-duration status. The Department is also instructed to report to the Legislative Fiscal Office, following each sale of Article XI-M or Article XI-N general obligation bonds, on the projects and dollar amounts of project grants financed by the bond sale, as well as on the amount of bond proceeds budgeted for agency administrative costs.

The Subcommittee established a \$1 Other Funds expenditure limitation for the American Manufacturing Innovation District, and increased Other Funds by \$54,868 for cost of issuance of lottery revenue bonds for this project. The American Manufacturing Innovation District is a collaborative effort between government, industry, and academic institutions to invest in manufacturing infrastructure to promote advanced manufacturing. A total of \$2.5 million of lottery revenue bond proceeds are authorized for this project in House Bill 5202, which also authorizes \$5 million of Article XI-G bond proceeds for distribution to Portland Community College (PCC) in support of this project. The Subcommittee limited expenditure of bond proceeds to \$1, pending a joint presentation with PCC of a business plan for developing the District. Debt service costs for the lottery revenue bonds authorized for this project are projected to total approximately \$535,000 Lottery Funds per biennium, beginning in the 2017-19 biennium. Because the bonds will not be issued until spring 2017, there will be no debt service payments due in the current biennium.

The Subcommittee also approved a technical correction to the budget for the State Small Business Credit Initiative (SSBCI) program. This correction increases Other Funds expenditure limitations in the Business, Innovation and Trade Division by \$388,773, and reduces the Division's Federal Funds expenditure limitations by the same amount. The SSBCI is funded from a federal grant the agency secured in 2011 that provided Federal Funds for revolving loan programs. It was noted when the grant was received that administrative costs for the program would transition to Other Funds over time, as the grant money was loaned out and the loan repayments were re-categorized as Other Funds. The Subcommittee added this anticipated fund shift, which had not been included in the agency's budget, to the bill.

Federal Funds expenditure limitation was increased for the Business, Innovation and Trade Division by \$450,000 for expenditure of funds received under the Year 4 State Trade and Export Promotion grant program. This increase more than offsets the \$388,773 Federal Funds expenditure limitation decrease for SSBCI and results in a net increase of \$61,227 for the Business, Innovation and Trade Division Federal Funds expenditure limitation.

Finally, the Subcommittee approved a budget adjustment to increase Nonlimited Other Funds expenditures by \$5,820,000. This adjustment reflects a greater level of loan repayments than originally anticipated in the budget. Loan repayments are not limited in the agency budget. The adjusted level of Nonlimited Other Funds in the Infrastructure Finance Authority will include approximately \$24.2 million of loan repayments.

### **Employment Department**

A technical adjustment is included for the Employment Department to more accurately reflect the amount expected to be utilized by the agency from \$85 million in modernization funds appropriated to the agency through the federal Social Security Act. Close of session budget reconciliation adjustments resulted in more dollars being available from the Supplemental Employment Department Administrative Fund for

Department operating expenditures. This adjustment does not change the overall amount of the agency's recommended budget, merely the source from which the Department can make expenditures. As such, the appropriation of modernization funds made to the Department is decreased by \$17 million; sufficient Other Funds expenditure limitation exists to enable the Department to make equivalent expenditures from a combination of Supplemental Employment Department Administrative Funds and the Special Administrative Fund.

### **Housing and Community Services Department**

The Subcommittee approved an increase in General Fund of \$2,727,660 for counseling services associated with the Oregon Foreclosure Avoidance Program. The 2015-17 legislatively adopted budget included \$1.4 million General Fund, which was estimated to be sufficient through February 2016. The Housing and Community Services Department was directed to report back to the Legislature on program utilization, foreclosure rates, and actual monthly expenditures to counseling agencies. The additional General Fund is included for program expenditures for the remainder of the 2015-17 biennium, as follows: \$2.36 million for counseling services provided on a fee-for-service basis as indicated via contract with the Housing and Community Services Department; \$233,333 for legal aid services for counseling clients with particularly complicated circumstances; and \$127,480 for agency program administration, with the understanding that the Department of Administrative Services will unschedule \$275,000 of the amount. Funding for the program is not anticipated to be ongoing, although the agency may request funding for consideration during the 2017-19 budget process.

Also included is a one-time General Fund appropriation in the amount of \$10 million to the Housing and Community Services Department to be utilized as follows: \$8 million is for homelessness assistance and prevention services through the Emergency Housing Assistance (EHA) program and \$2 million is to the State Housing Assistance program (SHAP) for operational support for emergency shelters and supportive services to shelter residents. Funding for the EHA program is spent as Other Funds by the Department, and is reflected in an additional \$8 million in Other Funds expenditure limitation.

Other Funds expenditure limitation in the amount of \$2,554,868 is included to enable the Housing and Community Services Department to expend proceeds from the sale of lottery bonds for preservation of affordable housing with expiring federal subsidies. Of this amount, \$2.5 million is attributable to project costs and \$54,868 is related to cost of issuance. Eligible projects for which these funds can be expended are defined as the following:

- Privately owned multi-family rental properties where at least 25% of the units are subsidized by a project-based rental assistance contract through the U.S. Department of Agriculture Rural Development or the U.S. Department of Housing and Urban Development;
- Existing manufactured housing communities to be acquired by a mission-based non-profit organization, resident cooperative, tenants' association, housing authority, or local government; or
- Public housing projects undergoing a preservation transaction which involves a comprehensive recapitalization and which will secure ongoing rental subsidies.

### **Oregon Department of Veterans' Affairs**

The Subcommittee approved an increase in Federal Funds expenditure limitation of \$499,999. The Oregon Department of Veterans' Affairs (ODVA) received a 2015 grant from the U.S. Department of Veteran's Affairs in the amount of \$500,000 for transportation of Oregon veterans in highly rural areas to medical appointments. Awards of \$50,000 per county will be used to preserve and maintain transportation programs established with the 2014 federal grant award. The counties receiving funds are Baker, Gilliam, Grant, Harney, Lake, Malheur, Morrow, Sherman,



Wallowa, and Wheeler. ODVA acts as the applicant and grantee on behalf of the counties, and will pass through funds and monitor compliance with grant requirements. The grant is for a period of one year and requires no matching funds or additional positions for administration. A placeholder amount of \$1 in Federal Funds expenditure limitation was included in the legislatively adopted budget for the agency.

## **EDUCATION**

### **State School Fund**

The Subcommittee approved a decrease of \$39,553,391 General Fund and an increase of \$39,553,391 Lottery Funds for the State School Fund. These changes reflect the balance of available General Fund and Lottery Funds for the overall state budget and maintains the amount of \$7,376 million total funds for the State School Fund for the 2015-17 biennium.

### **Department of Education**

The Subcommittee approved changes in the Federal Funds expenditure limitations for agency operations for federal grants received by Department of Education as described below:

- An increase of \$7,130,223 for a three-year federal grant from the U.S. Department of Education's Office of Innovation and Improvement. The purpose of the grant is to increase the number of high-quality charter schools by providing assistance to potential charter schools for planning, program design, and initial operations. Funds will also be used to share best practices among all charter schools and sponsoring districts. One limited duration position (0.63 FTE) was approved relating to the grant.
- An increase of \$1,160,860 for three separate child nutrition grants from the U.S. Department of Agriculture. The three grants were the Professional Standards Training grant (\$138,915), the Team Nutrition grant (\$203,563), and the Tier 2 Direct Certification Improvement grant (\$818,382). A limited duration position (0.63 FTE) was approved for the Tier 2 Direct Certification Improvement grant.

The Subcommittee approved an increase of \$515,200 Other Funds expenditure limitation to cover costs of an increase in the number of students participating in the Hospital Program. The agency is required to provide and pay for the costs of educational services for children, through age 21, who are expected to be hospitalized for an extended period of time. This increase will be funded through an increased distribution from the State School Fund. Also approved was a transfer of \$51,458 General Fund from the breakfast and summer food programs under Grant-in-Aid to agency Operations for the administration of the Farm-to-School program. A one-time increase in the Other Funds expenditure limitation of \$2,030,515 for the Oregon School for the Deaf was approved for deferred maintenance, including replacement of the School's Heating Ventilation Air Conditioning, or HVAC, system. The source of funds for this includes moneys set aside from the sale of the School for the Blind property, income from the rental of school facilities, and the anticipated sale of a vacant parcel of school property. The Department of Administrative Services is instructed to unschedule this increase until the final cost of the project is determined and the sale of the vacant property is completed.

To ensure that debt service payments on education-related Lottery Bonds are funded from the proper sources, the Subcommittee approved changes to the amount of Lottery Fund resources allocated to the Department of Education. House Bill 5016, the 2015 appropriation bill for the agency, allocated the entire \$1,434,927 required for debt service payments from the Oregon Education Fund. The actual allocation is \$593,395 from the Oregon Education Fund and the remaining \$841,532 is from the Administrative Services Economic Development Fund.

The Subcommittee approved an increase of \$3,130,000 General Fund for the Oregon Department of Education's agency operations to fully fund the Assessment and Accountability unit. The 2015-17 budget for this unit was inadvertently underfunded by \$3,771,938 General Fund and needs these funds to meet its responsibilities and commitments. This budget gap is resolved by transferring \$930,000 General Fund from the Grant-in-Aid budget in unallocated resources and an increase of \$2,200,000 in new General Fund resources. The remaining \$641,938 is to be found by the agency in savings in its existing agency operations budget, including holding positions vacant in the unit. There is also a transfer of \$2,000,000 in excess Federal Funds expenditure limitation from the Grant-in-Aid budget to Operations, and an additional increase of \$1,971,397 in Federal Funds expenditure limitation to match the amount of federal funding available for this function.

General Fund increases for existing programs were approved as described below:

- Funding for the Oregon Pre-Kindergarten program was increased by \$5.3 million, bringing the total General Fund resources for this program to \$145.3 million.
- Funding for the Early Intervention and Early Childhood Special Education programs was increased by \$5,393,340 General Fund. This increase reflects, in part, the growth in these two programs at a rate greater than estimated at the end of the 2015 session. Total General Fund resources for these programs, including this increase, is \$155.8 million.
- The Relief Nurseries program was increased by \$300,000 General Fund, bringing the total General Fund available for the 2015-17 biennium to \$8.6 million. This additional funding and the \$700,000 General Fund appropriated by chapter 837, section 109, Oregon Laws 2015 should be considered permanent for the purposes of developing the 2017-19 budget.

One-time General Fund appropriations were approved by the Subcommittee for new programs and grants as described below:

- \$260,000 General Fund for a grant to the Burnt River School District for the Burnt River Integrated Agriculture/Science Research Ranch program. This program provides educational opportunities to students from outside the district, including from the Portland area, and provides a number of educational services outside of the core curriculum common to all high school students, including natural resource studies, agricultural experience, water quality monitoring, animal husbandry, sustainable rangeland science, forest restoration, and organic food production.
- \$400,000 General Fund for grants to organizations which provide training and assistance relating to culturally relevant educational practices authorized as eligible services under the Network for Quality Teaching and Learning under House Bill 4033. Grants of equal value are to be provided to two organizations: (1) Center for Culturally Responsive Practices and (2) Teaching with Purpose.
- \$95,000 General Fund appropriation for a grant to the World of Speed organization for the High School Automotive Career Technical Education program. The organization partners with Clackamas Community College and area high schools to provide automotive related career technical education (CTE). Other high schools have expressed interest and the \$95,000 would be used to match other contributions to the program, assisting with cost of transporting students to the facility for classes, and other program costs.

The Subcommittee eliminated the \$17,540,357 General Fund special purpose appropriation to the Emergency Board for the mixed delivery preschool program established in House Bill 3380 (2015) and directly appropriated the same amount to the Oregon Department of Education for

the same purpose. The intent is for this funding to be distributed to four to six Early Learning Hubs that demonstrate that the Hub and the providers in their service area are prepared to implement the mixed delivery preschool model beginning in September 2016. In developing the 2017-19 current service level budget for this program, only the full two-year costs of this appropriation should be factored into the calculation. Any further expansion to add new Early Learning Hubs should be a separate policy decision made by the Legislature during the 2017 session. In addition to the annual report to the Legislature required in House Bill 3380 (2015), the agency is instructed to report to the Emergency Board prior to June 1, 2016 on which Early Learning Hubs were selected, the number of preschool providers estimated to be delivering the program, the estimated number of children that will be served under the program, and an update on the various cost components of the program.

One permanent Research Analyst 3 position (0.63 FTE) was approved to manage and analyze information collected through the Class Roster data from school districts under House Bill 2644 (2013). The agency will identify the funding from existing resources for the 2015-17 biennium.

### **Higher Education Coordinating Commission**

The Subcommittee approved a one-time \$1,800,000 General Fund appropriation to the Higher Education Coordinating Commission (HECC) for a grant to Umpqua Community College (UCC) to address the issues resulting from the shooting incident on the UCC campus on October 1, 2015. The funding may be used for: (1) staff, including security staff; (2) upgrading security communications equipment, door locks, and campus lighting; (3) upgrading the campus's network fiber system to accommodate the new communications equipment; and (4) other costs related to the October 1st incident. HECC is to report back to the Legislature as part of its budget presentation to the Joint Committee on Ways and Means in 2017 on how these resources were expended. Also approved was a one-time \$4,250,000 General Fund appropriation to HECC for a grant to UCC for the construction or renovation of a replacement for Snyder Hall where the shooting incident took place. The College is currently not using the classroom space in the building and is relying on temporary structures to replace some of the space.

The Subcommittee recognized the Community Colleges' needs regarding campus and student security and safety issues which were illustrated, in part, by the shooting incident at UCC. The Governor has appointed a workgroup to recommend actions and investments for security and safety at Community College and other Post-Secondary institutions. Based on the recommendations of the workgroup and the Community Colleges, the Legislature will address this issue during the 2017 session.

An \$804,506 increase in Other Funds expenditure limitation was approved by the Subcommittee for payment of the costs of issuing General Obligation bonds on behalf of community colleges and public universities. This increase represents the estimated amount required if all of the bonds authorized for the 2015-17 budget cycle are issued by the end of the current biennium.

The Subcommittee also approved three one-time General Fund appropriations to HECC to be allocated to Oregon State University. The first appropriation is \$800,000 for the Northwest National Marine Renewable Energy Center to serve as match for federal funds for the Pacific Marine Energy Center South Energy Test Site. The federal government has made an initial \$5 million available to fund a competitive grant to further develop a wave energy test facility, with the expectation that a 25% local match will be provided. HECC is only to release the funds if Oregon State University is awarded the grant. The second appropriation is \$100,000 for endophyte research which is to be matched by private dollars. These funds are to be used only for endophyte research in support of Oregon's fiber and straw export industry. A report to the Legislative Fiscal Office on how the funds were used in support of endophyte research and what was made possible by this additional influx of funds should be made by December 31, 2016. The third is \$100,000 for the purpose of establishing an endowed scholarship fund through the Oregon State



University Foundation. The scholarship must be used to support students engaged in research associated with Amyotrophic Lateral Sclerosis (ALS).

The Subcommittee approved a one-time General Fund appropriation of \$1,900,000 for the four technical and regional universities, along with Portland State University, to help fund new compensation agreements for classified staff. HECC is directed to distribute the following amounts to the following universities: Portland State University - \$400,000; Eastern Oregon University - \$251,559; Southern Oregon University - \$468,591; Western Oregon University - \$485,646; and Oregon Institute of Technology - \$294,204.

**Budget Note:**

The Subcommittee recognizes that the Current Service Level (CSL) is intended to estimate the cost of legislatively approved programs in the upcoming biennium. In 2009, the Joint Committee on Way and Means approved the adoption of a CSL model for the Community College Support Fund (CCSF) to reflect health benefit and retirement costs expected to exceed the Department of Administrative Services standard inflation rate.

To ensure consistency in post-secondary state support CSL calculations, the Department of Administrative Services (DAS) and the Legislative Fiscal Office (LFO) are directed to develop, in consultation with the Higher Education Coordinating Commission and the seven public universities, an estimated cost of applying the Community College Support Fund model to the Public University Support Fund, the Agricultural Experiment Station, the Extension Service, the Forest Research Laboratory, and Public University State Programs. The estimate will include data elements that the public universities will be required to submit to HECC in order to implement the model.

DAS and LFO will provide the estimated cost to implement the Community College Support Fund CSL model for Public University state support to the Emergency Board, through the Legislative Fiscal Office, by July 1, 2016.

**Chief Education Office**

The Chief Education Officer, in cooperation with other education agencies, has completed the steps necessary to receive Stage Gate 3 approval to move forward on the development of the Statewide Longitudinal Data System (SLDS). This means the project staff have completed the required project management documents with approval from the State's Chief Information Officer. As a result, the Subcommittee approved \$5,505,280 General Fund for the project development and staff for this biennium. Based on the project's schedule, this will leave one quarter's worth of development costs for 2017-19. Ongoing costs for the Data System, starting in 2017-19, are estimated to be roughly \$3.0 million per biennium, including staff for the operation, data integration, and maintenance, as well as the network-related costs due to the Department of Administrative Services (DAS). Also approved were 3 new permanent positions (1.75 FTE) and an additional 1.86 FTE to continue three existing limited duration positions for the remainder of the biennium. Two of these three limited duration positions, the Project Director and Systems Integration positions, are made permanent. DAS is instructed to unschedule \$495,000 of this appropriation, which represents the project contingency funds. The agency can make a request to DAS and the Legislative Fiscal Office to reschedule these contingency funds if need arises before the end of the biennium. The Chief Education Office is instructed to report to the Emergency Board prior to October 1, 2016 on the project's progress and expenditures.

### **Teacher Standards and Practices Commission**

Senate Bill 78 (2015) appropriated \$200,000 General Fund to the Teacher Standards and Practices Commission to be transferred to the Teacher Education Program Accreditation Account. This funding was intended to support grants for teacher education programs that incur costs associated with national teacher accreditation. According to current accounting practices, the agency needs to expend the \$200,000 as “Other Funds,” requiring an Other Funds expenditure limitation increase of \$200,000 so these grants may be awarded.

### **Various Agencies**

The Subcommittee approved the transfer of \$2.0 million General Fund from the Oregon Department of Education (ODE) to the Higher Education Coordinating Commission (HECC). These funds had been part of a larger investment in Career and Technical Education (CTE) and Science Technology Engineering and Mathematics (STEM) programs appropriated to ODE in House Bill 5016 (2015). One component of this CTE and STEM investment was a program related to post-secondary success to provide start-up funding and support services for the recruitment, retention, and attainment of underserved students in post-secondary programs related to high-demand fields including, but not limited to, health sciences, computer science, engineering, high tech manufacturing, precision agriculture, and advanced food processing. This program is more appropriately administered by HECC.

The Subcommittee approved one-time increases in the General Fund appropriations for the Chief Education Office, HECC, and ODE for student transitional services and supports between secondary and post-secondary education. This distribution reflects, in part, the product of a workgroup organized by HECC to recommend what services should be funded by a \$6,865,921 General Fund special purpose appropriation made in Senate Bill 418 (2015). This bill eliminates the special purpose appropriation and uses some of these resources to fund transitional services under House Bill 4076. Additionally, a total of \$4,025,000 is appropriated for transitional services and supports between secondary and post-secondary education as outlined below.

	<u>General Fund Appropriation</u>
<b>Chief Education Office</b>	
Summer summit for high school and post-secondary staff including counselors and financial aid staff	\$ 300,000
Local collaboration between high school counselors and post-secondary advisors	\$ 700,000
<b>Higher Education Coordinating Commission (HECC)</b>	
Community College support for improved Developmental Education models	\$ 600,000
Community College support for development and alignment of Career Pathways	\$ 600,000
Expansion of eMentoring for Oregon Promise students	\$ 120,000
Statewide expansion of FAFSA Plus	\$ 105,000
Subscription of Signal Vine connecting with students via two-way texting	\$ 100,000
Evaluation and tracking implementation of transitional supports and services in this bill	\$ 50,000
<b>Oregon Department of Education</b>	
License for College and Career Readiness counselor training modules	\$ 50,000
Expansion of AVID or similar program for high schools	\$ 1,400,000
<b>Total</b>	<b>\$ 4,025,000</b>

## HUMAN SERVICES

### Oregon Commission for the Blind

The Subcommittee approved one-time increases of \$680,109 General Fund, \$199,049 Other Funds, and \$3,248,343 Federal Funds to purchase vending machine equipment for the agency's Business Enterprise Program. The Department of Administrative Services is expected to unschedule these amounts, which may only be rescheduled based upon the successful request of federal reallocation funds from the U.S. Department of Education.

### Oregon Health Authority

Senate Bill 5701 adjusts the Oregon Health Authority (OHA) budget for updated pricing of program caseloads, costs, and revenues to "rebalance" the budget. This information was presented at the January 2016 meeting of the Interim Joint Committee on Ways and Means. The agency's rebalance plan resulted in an overall General Fund shortfall of \$37.6 million. This net position included budget problems of \$129.7 million General Fund related to increases in caseload and other program costs. Savings of \$67.1 million General Fund resulted from a change in the federal match rate, as well as from additional revenues from a number of sources. In addition, the agency is planning to implement management actions to decrease costs by \$25 million General Fund. These include an acceleration of the redetermination process next year, a delay in fee-for-service rate adjustments, and enhanced savings from program integrity efforts, including fraud detection.

The rebalance plan increases Federal Funds expenditure limitation by almost \$1 billion, mostly related to the increased caseload forecast. There are also a number of technical adjustments included in the rebalance. While these normally net to zero for the agency as a whole, in this case there is a transfer of 14 positions from the Department of Human Services to OHA.

As discussed during the 2015 legislative session, the agency has implemented an agency restructure as a part of this rebalance. The new structure is designed to promote health care transformation, including integration of physical, behavioral, and dental health. This structure better reflects the new work of coordinated care organizations, as well as public health programs aligned with system transformation. Most significantly, the old Medical Assistance Programs (MAP) and Addictions and Mental Health (AMH) are eliminated in the restructure, with MAP and community mental health and addictions programs moving to the new Health Systems Division (HSD). The Oregon State Hospital (OSH) will now be its own budget structure.

As a part of the agency restructure, a thorough review of positions was conducted. Partly historical, dating back a number of years, and partly as a result of the implementation of health care transformation and the Affordable Care Act when many staff were brought on to perform time-sensitive tasks, the agency found itself with many staff but without appropriate position authority. In addition, as health care transformation moved forward, the agency needed fewer positions in some areas but more and/or different kinds of positions in other areas. The true-up included in the rebalance resolves issues of permanent staff not having position authority, as well as limited duration staff that had been used for on-going functions and priorities now becoming permanent positions. Overall, the changes are budget neutral and result in a reduction of two positions and an increase of 9.52 FTE.

The agency continues to face a number of budget risks that were not explicitly included in the rebalance plan. These include changes to caseloads, prescription drug costs, increased Aid and Assist population in the Oregon State Hospital, and costs of pending litigation. The special purpose appropriation of \$40 million that was established during the 2015 legislative session for OHA or the Department of Human Services will remain in place to address caseload costs or other budget challenges that the agencies are unable to mitigate.

The Subcommittee approved the agency's rebalance plan, with one notable exception. Costs of \$17 million General Fund related to the Medicaid Oregon eligibility (ONE) system were not funded at this time. These are costs to maintain the old eligibility system for litigation purposes after the contract with Oracle expires in March 2016. In addition to rebalance adjustments, the Subcommittee approved \$25 million of additional hospital assessment revenue that is remaining from the program ending September 30, 2015, which will be used in the budget in place of General Fund.

Overall, the adjustments made in Senate Bill 5701 result in an increase in the agency's total funds budget of \$1.1 billion, a reduction of General Fund of \$1.5 million, and an increase of 21 positions (22.88FTE). These numbers do not include budget changes related to employee compensation cost changes, which total \$20.8 million General Fund and \$37.8 million total funds, and are also included as part of Senate Bill 5701.

A more detailed description by program area follows.

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Health Systems Division

The budget adjustments in Senate Bill 5701 reflect a net \$8.3 million decrease in General Fund in the Health Systems Division (HSD), with a \$75.4 million increase in Other Funds expenditure limitation and a \$964.7 million increase in Federal Funds expenditure limitation.

The rebalance plan for HSD approved by the Subcommittee includes increased caseload costs of \$84.4 million General Fund. Caseload forecasts are up primarily because redeterminations have been delayed several times over the past year. With the recent implementation of the new ONE eligibility system, the agency anticipates catching up on redeterminations over the next year. While the caseload forecasts have attempted to build in the timing of these redeterminations, forecast risks will remain higher than usual until the data has settled down over an extended period of time and there is good historical information on which to base the forecasts. Other costs include \$10.7 million General Fund for an increase in the Medicare Part D clawback required by the Centers for Medicare and Medicaid Services (CMS). Medicare Part B premiums have also increased, resulting in a General Fund need of \$7.2 million. Oregon pays these premiums for clients that are eligible for both Medicare and Medicaid. Eight additional Federally Qualified Health Centers (FQHCs) are moving to the alternative payment methodology, resulting in a one-time cost of \$3.1 million General Fund.

The rebalance plan includes a General Fund need of \$20.9 million General Fund for the new ONE eligibility system. Additional refinement of operational and maintenance costs for the system have resulted in a need for \$3.9 million General Fund above what is currently budgeted. The remaining \$17 million represents the costs to maintain the old eligibility system for litigation purposes after the contract with Oracle expires in March 2016. The Subcommittee did not approve that \$17 million General Fund in the final budget.

The rebalance plan includes a total of \$63.4 million General Fund savings in HSD. This includes a \$10.2 million savings resulting from an increase in the federal match rate for Oregon, and \$11.8 million freed up by an increase in the tobacco tax revenue forecast for the biennium. In addition, \$25 million of Other Funds are left over from 2013-15 and can be used to replace General Fund for the current biennium. Settlements and drug rebate revenues are coming in about \$15 million above budget and will replace General Fund as well. Finally, caseloads related to forensics patients living in the community went down slightly for a savings of \$1.4 million.

The rebalance plan includes management actions to decrease costs by \$25 million General Fund, all in HSD. These include an acceleration of the redetermination process next year, a delay in fee-for-service rate adjustments, and enhanced savings from program integrity efforts, including fraud detection. Finally, the rebalance includes an additional \$964.7 million in Federal Funds expenditure limitation, primarily because of the increased caseload. An addition of \$40.4 million Other Funds expenditure limitation results from the additional revenues discussed above.

In addition to rebalance adjustments, the Subcommittee adjustments include the addition of \$35 million of additional hospital assessment revenue that remains from the assessment program that ended September 30, 2015. Of the total, \$25 million will be used to replace General Fund in the 2015-17 budget, while the remaining \$10 million Other Funds has been approved for one-time investments in rural hospital transformation and sustainability as outlined below. These recommendations were brought forward by a workgroup required by a Senate Bill 5507 (2015) budget note.

For investment in rural health provider workforce capacity, it is expected that at least \$1.5 million Other Funds will be used to support the work of Oregon's Graduate Medical Education Consortium.



Investments in small and rural hospital transformation strategies include: establish transitional post-acute care programs (cost of \$4 to \$7 million over three years), establish virtual clinics in communities with acute primary care shortages (cost of up to \$1.1 million), and provide education for rural providers on population health (cost of \$100,000). Costs associated with each option available to rural hospitals will depend on the number of hospitals that pursue each option. Rural hospitals have the flexibility to select one or more options depending on local needs. The funding for hospital programs will be distributed through OHA, to the Oregon Association of Hospitals Research and Education Foundation, which will collaborate with OHA to identify related baseline and outcome data on each project and report that data to OHA as well as provide the funding to implement each of the projects available to rural hospitals.

The following budget note was approved by the Subcommittee.

**Budget Note:**

The Oregon Health Authority shall identify and track related outcomes on each project that is implemented as a result of the \$10 million investment in rural hospital transformation and sustainability, shall provide regular updates to the Legislative Fiscal Office and the Department of Administrative Services Chief Financial Office, and shall report back to the Joint Committee on Ways and Means during the 2017 legislative session on the implementation and status of the projects, outcomes to date, costs to date, as well as recommended policies which will improve population health outcomes in rural Oregon.

The Subcommittee included \$2 million General Fund for the Medicaid Primary Care Loan Repayment Program. This program was funded in the 2013-15 biennium, but not in the current biennium. The budget also includes \$0.5 million General Fund for negotiated compensation cost changes for non-state employees. As discussed above, most of the special purpose appropriation of \$10.7 million, which had been set aside for this purpose, was distributed to OHA and the Department of Human Services.

The Subcommittee included \$900,000 of one-time General Fund for planning and start-up costs related to providing medical assistance for additional children in Oregon. The following budget note was approved.

**Budget Note:**

The Oregon Health Authority is directed to develop a plan and recommendations for extending medical assistance to children not eligible under ORS 414.231(3) including: eligibility criteria, coverage options, enrollment estimates, issues of equity and inclusion, integration with other programs, outreach, administrative and staffing changes, phasing options, and cost estimates. In developing the recommendations, the agency is expected to engage stakeholders and legislators, and utilize information on experiences in other states. The agency will report back to the appropriate committees during the 2017 legislative session on their plan and recommendations.

**Oregon State Hospital**

The rebalance plan approved by the Subcommittee for the Oregon State Hospital (OSH) includes \$2.7 million General Fund to finish the implementation of the Avatar system, the electronic health record system at the hospital. Much of the Avatar system has been completed and adopted into the normal workflow processes. This includes the Clinician Work state, Lab Management, and Food and Nutrition Services.

However, the Medication Management and the Billing modules have not yet been fully implemented and adopted into the workflow processes. Implementation of the medication management module will allow the use of automated dispensing of medication, as well as electronic medication administration records. A recent Secretary of State audit noted the importance of finishing this work, both from an efficiency and patient safety perspective. The Billing module will assist in more accurate and timely reimbursement requests to Medicare, Medicaid, and third party insurance providers. The agency has contracted with a company to assist with the final adoption and implementation of these parts of the system.

The rebalance plan also includes the transfer of \$10 million General Fund from OSH to Statewide Assessments and Enterprise-wide Costs (SAEC). This funding was put in the OSH budget to be used for cost allocation purposes once the agency had done a thorough review of cost allocation issues within OSH and agreed with CMS on a new cost allocation plan. Once cost allocation is actually implemented, the funding will need to be in SAEC.

Although the agency believed it was too early to bring forward as a formal request, there is risk to the Oregon State Hospital budget. The Aid and Assist population at the hospital continues to grow and may ultimately result in the need to open an additional ward. The agency is in the process of implementing several investments that are expected to ease the pressure from this population, and so at this point is not requesting any funding. OSH is also closely monitoring the use of overtime, particularly as it relates to staff use of the federal Family and Medical Leave Act, and may eventually request additional positions to deal with these issues.

#### Public Health

The Subcommittee approved an Other Funds expenditure limitation of \$4.0 million and two permanent positions (1.00 FTE) for a youth marijuana-use prevention pilot project as required in House Bill 4014. The one-time funding for this program will be transferred from the Oregon Liquor Control Commission Account, to be repaid out of marijuana tax revenues. This evidence-based pilot project will serve as a basis for establishing a statewide program during the 2017-19 biennium. The distribution of marijuana taxes during the 2017-19 biennium may be adequate to fund the statewide program, but if not, the agency will need to request additional funding to operate an ongoing program.

The agency anticipates establishing a new fee for medical marijuana processors, and increasing the fee on growers, effective April 1, 2016. These fees are necessary to pay for the increased costs to the program with the changes that resulted during the 2015 session. The increased expenditure limitation was included in the agency's 2015-17 legislatively adopted budget.

The agency anticipates a fiscal impact from House Bill 4014 and Senate Bill 1511, which make changes to both the medical marijuana and recreational marijuana systems. In addition to the pilot project discussed above, House Bill 4014 requires the agency to issue receipts to medical marijuana registry applicants on the same day that they are received. This is expected to require additional staff. Senate Bill 1511 allows producers, processors, and distributors that currently are limited to medical marijuana only to choose to operate in both the medical and recreational markets. In that case, both the licensing revenue and the regulatory functions related to those entities will move to the Oregon Liquor Control Commission (OLCC). In the short run, this will create additional workload for program staff in Public Health, as paperwork is completed to allow the entities to shift. In the long run, OHA estimates up to a \$5.6 million loss of revenue during the 2015-17 biennium, as producers, processors, and dispensaries opt to be licensed and registered by OLCC. While the agency would also experience some cost reductions as less regulatory work would be required, it is likely that the revenue reduction would occur sooner than the costs can be reduced. The overall effects cannot be estimated accurately at this time.

The agency expects to include the necessary adjustments to expenditure limitation, as well as adjustments to numbers and classifications of positions needed, in the rebalance they will submit during the fall of 2016. In their rebalance report, the agency will also report on the estimated revenue loss and its program impact. A number of on-going core public health programs are funded with fee revenue generated through the medical marijuana program. If revenues are inadequate to fund these programs, General Fund could be required to continue these programs, or the programs would need to be reduced or discontinued. These programs include state support for local public health departments, the Safe Drinking Water Program, Emergency Medical Services, and others.

One full-time position (0.38 FTE) was approved for the Prescription Drug Monitoring Program for workload associated with House Bill 4124.

#### Central and Shared Services/Statewide Assessments and Enterprise-Wide Costs

The rebalance plan approved by the Subcommittee for the administrative units of the agency includes \$0.6 million General Fund for mass transit costs and treasury fees that were not included in the original budget. In the future, these need to be incorporated in the budget build process.

Debt service is also included within these budget units. The Oregon State Hospital Replacement Project is expected to close out with a surplus of \$3.7 million in bond proceeds. This surplus will be used to pay down debt service and free up General Fund. Another \$0.4 million Other Funds expenditure limitation has been identified by the Department of Administrative Services as available to pay debt service on these bonds, also freeing up General Fund.

#### Department of Human Services

The 2015-17 budget for the Department of Human Services (DHS) is built around nine budget structures and five appropriations. The budget structures reflect five direct program areas: Self Sufficiency (SS); Child Welfare (CW); Vocational Rehabilitation (VR); Aging and People with Disabilities (APD); Intellectual and Developmental Disabilities (IDD); and four program support functions: Program Design Services (PDS), Central Services (CS), Shared Services (Shared), and State Assessments and Enterprise-wide Costs (SAEC).

The majority of the DHS budget adjustments approved by the Subcommittee are driven by actions needed to rebalance the agency's budget. At the January 2016 meeting of the Interim Joint Committee on Ways and Means, the agency presented a rebalance report indicating a significant funding need – \$71.7 million General Fund – to sustain programs for the remainder of the biennium. This projection incorporates a number of issues affecting the agency's budget, including caseload changes, increases in cost per case, and other program changes or issues arising since the 2015 legislative session.

The biggest drivers of the budget deficit are caseload costs in the APD and IDD programs, some of which are compounded by collective bargaining actions and federal regulations. While these issues were identified as budget risks during the 2015 session and handled either directly in the budget or through special purpose appropriations, some costs were not adequately estimated. In addition to costs, the DHS rebalance calculation does factor in caseload savings in Temporary Assistance for Needy Families (TANF) and from federal match rate changes. The approved rebalance plan addresses part of the budget gap by directly adding \$37.4 million General Fund to the budget; however, this leaves about \$34.9 million General Fund associated with APD and IDD caseload costs unfunded (as of the current projection; the unfunded amount may change as expenditures are recorded and projections evolve).

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The special purpose appropriation of \$40 million that was established during the 2015 legislative session for DHS or OHA has been left untouched and continues to be available for the Emergency Board to allocate to help cover caseload costs or other budget challenges that the agencies are unable to mitigate. However, if demand ends up being greater than the amount of funding set aside, other legislative action may be required early in the 2017 session. DHS will continue to closely monitor caseload counts and costs in all programs, while continuing to develop long term solutions to ensure budget sustainability.

Regarding sustainability, the budget report for House Bill 5026 (2015), contained a budget note directing the agency to report, during the 2016 legislative session, on ways to ensure program sustainability specifically for the APD and IDD programs. This direction was in response to concerns about budget growth and increases in both caseload volume and costs. The agency engaged an external consultant to support the development of independent and unbiased options for program sustainability. The final report, produced by the Lewin Group, was received on February 10, 2016, and identifies potential strategies for “bending the cost curve” in these programs. Suggestions primarily revolve around changing eligibility, modifying services, and increasing participant cost-share. Input from stakeholders was included in the report; while they acknowledge that projected program costs are unsustainable, there are varying perspectives on how best to deal with costs.

Legislative members expressed frustration with the report, as it had a limited amount of modeling, was unable to capture all potential budget drivers, and did not result in a list of succinct options for potential action. Both the Lewin Group and DHS indicated this was primarily due to time and data constraints. A group of legislators, primarily from the policy and budget committees overseeing human services issues, is committed to working with the agency and stakeholders to develop policy and program change options discrete enough to be fully vetted and priced for potential budget action in the 2017 legislative session. DHS has also identified some areas where it can start to make some changes, mostly around best practices for assessing client needs and validating that the most appropriate services/service levels are being authorized. To formalize these efforts, the Subcommittee adopted the following budget note:

**Budget Note:**

- 1) The Department of Human Services is directed to take steps to provide policy and budget options for decision making that will be required during the 2017 legislative session to ensure future sustainability of the APD and IDD programs. Steps include further refinement, analysis, and pricing of viable options or ideas brought forth by the agency, stakeholders, and other interested parties; the focus should be on ways to control caseload growth and utilization. The agency will reach out to legislators, stakeholders, and partners to assist in this effort. In developing sustainability proposals, the Department shall prioritize options that minimize impacts on consumers and providers. The Department will also formally report, at a minimum, to the Emergency Board during Legislative Days in May and December 2016 on progress made under both parts of this budget note. The agency may also be requested to report to interim legislative policy committees on human services.
- 2) In addition to the work described above, the Department is also directed to take immediate actions that may help contain costs without changing the current service system structure and that do not require statutory changes. The agency’s action plan includes:
  - Review and correct, if needed, the relationship between assessment tools and program eligibility criteria;
  - Take action to more efficiently align service authorization with people’s needs, also consider appropriate limits;

- Work to limit use of overtime in service plans; but the agency should take into account workforce shortage areas, the needs of consumers, and changes to current consumer provider relationships;
- Continue discussions with CMS to prevent the conversion of natural support to paid support, with consideration for parental responsibility; and
- Further restrict the live-in program to prohibit live-in service plans when the individual lives in their family's home or the family lives with the individual and is served by that relative (they would still be served in the hourly program).

Overall, the adjustments made in Senate Bill 5701 increase agency's budget by just under \$350.0 million total funds; comprised of \$36,651,673 General Fund, \$27,557,059 Other Funds expenditure limitation, and \$285,760,479 Federal Funds expenditure limitation. The associated staffing changes result in a net increase of 16 positions (7.23 FTE). These numbers do not include budget changes related to statewide employee compensation, which total \$27.5 million General Fund (\$60.6 million total funds), and are also included as a part of Senate Bill 5701.

In addition to caseload cost underfunding and caseload forecast/cost volatility, there are other budget risks. These include costs associated with the approved settlement agreement for the *Lane v. Brown* lawsuit (reduce number of clients in sheltered workshops) and other legal expenses; federal changes to funding streams, program requirements, and possible sequestration; and impacts of economic changes, such as a recession.

A more detailed description of each program area's budget adjustments follows. For context regarding caseload changes, the 2015-17 legislatively adopted budget was based on the spring 2015 caseload forecast; the rebalance adjustments in Senate Bill 5701 factor in caseload and cost changes tied to the fall 2015 forecast, published in January 2016.

#### Self Sufficiency

The budget adjustments approved by the Subcommittee for the Self Sufficiency (SS) program reflect a decrease of \$36.7 million General Fund (and total funds) and 1 position (no FTE change).

The fall 2015 forecast projects the 2015-17 overall Supplemental Nutrition Assistance Program (SNAP) caseload to be 5.3% lower than earlier estimates. Embedded in the net decrease is a decrease in the number of SS households receiving SNAP, while the number of Aging and People with Disabilities households receiving SNAP continues to grow. Caseloads in the TANF cash assistance programs are down 11.6% from the spring numbers, at a biennial average of 24,787 families. Overall caseload savings of \$37.0 million General Fund are included in the agency's rebalance calculation and used to offset costs in other programs.

While the 2015-17 budget included significant investments in, and changes to, the Employment Related Day Care (ERDC) program, the agency estimates an additional \$709,327 General Fund is needed to fully cover costs of collective bargaining for day care providers. This amount includes \$600,000 for AFSCME child care providers that was not part of the agency's original rebalance request. The costs are covered with an allocation from the \$10.7 million General Fund special purpose appropriation for collective bargaining costs for workers who are not state employees.

Technical adjustments and transfers account for a decrease of \$0.5 million total funds for this program, most of which aligns the budget between SS and support functions. This action is consistent with past budgeting practices which have made these budget changes as part of the first rebalance after the budget was approved; similar adjustments are approved in other programs. Two part-time positions are also combined into one full-time position to better meet program needs.

The Subcommittee approved \$130,000 General Fund, on a one-time basis, for distribution to the Oregon Food Bank. Through purchase of a refrigerated truck, the funding will support expansion of the Fresh Alliance initiative. This food recovery program picks up donations of perishable food (nearing end of shelf life) from grocery stores and then makes that food available to hunger-relief agencies.

#### Child Welfare

For Child Welfare (CW), the Subcommittee approved a decrease of \$0.5 million General Fund, an increase of \$0.3 million Other Funds expenditure limitation, an increase of \$1.8 million Federal Funds expenditure limitation, and a decrease of 1 position (no FTE change).

Forecasts for individual caseloads within CW have fluctuated slightly between the spring and fall forecasts, with associated budget changes primarily due to an increase in cost per case. A net increase of \$1.9 million General Fund and \$4.4 million total funds is identified as being needed to fund caseloads, most of which is attributed to the Well Being program. The rebalance does include savings from a change in the Federal Medical Assistance Percentage (FMAP), decreasing the need for General Fund. Based on the latest federal estimates, the 2015-17 biennial average FMAP rate will increase from 64.21% to 64.37%, which reduces the state contribution and draws down additional federal dollars. This change will also affect other agency programs.

The agency's rebalance proposal included the establishment of a budget mechanism (\$19.5 million Other Funds expenditure limitation) to fully convert the General Fund budget for the Supporting, Preserving and Reunifying Families (SPRF) program into Other Funds. To avoid overstating the overall budget for this program, the approved rebalance plan does not include this adjustment. If, closer to the end of the 2015-17 biennium, DHS estimates it will underspend its General Fund budget for SPRF, the agency can request the legislature to approve paying those excess dollars into the SPRF fund (converted into Other Funds).

Technical adjustments and transfers are approved for this program, which generally align the budget between CW and support functions. A position action is included to combine two part-time positions into one full-time position to better meet program needs.

#### Vocational Rehabilitation

The budget approved by the Subcommittee for Vocational Rehabilitation (VR) reflects increases of \$3.3 million General Fund, \$8.5 million Federal Funds expenditure limitation, and 8 positions (9.89 FTE).

The fall 2015 forecast projects the 2015-17 VR caseload to be about 1% lower than the spring estimate. Any potential savings associated with fewer clients is masked by higher than projected costs per case, which have grown by 16.3% from the spring 2015 forecast. Higher costs continue to be driven by an increase in the number of clients with cognitive and psychosocial disabilities who have complex needs that are more challenging to meet.

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To maintain the program and cover these costs without activating the Order of Selection (priority wait list), the program estimates needing about \$7.5 million General Fund, since base federal dollars are capped. However, the rebalance plan uses \$8.5 million in one-time federal reallocation dollars to cover these costs for the 2015-17 biennium; these resources would need to be backfilled with General Fund in the 2017-19 budget to sustain program services. Another \$1.0 million of the one-time monies would cover costs associated with implementation of the federal Workforce Innovation and Opportunities Act (WIOA).

Technical adjustments and transfers account for an increase of \$3.3 million total funds and 11 positions (9.92 FTE); the dollars and the positions are associated with moving work tied to the Governor's Executive Order 15-01 and the Employment First policy package from Intellectual and Developmental Disabilities to VR. This position increase is partially offset by other actions converting part-time positions to full-time.

#### Aging and People with Disabilities

For the Aging and People with Disabilities (APD) program, the Subcommittee approved budget increases of \$33.5 million General Fund, \$17.2 million Other Funds expenditure limitation, and \$119.3 million Federal Funds expenditure limitation; no position changes were needed. The increases cover all but about \$8.7 million General Fund (plus corresponding Federal Funds expenditure limitation) of the agency's current projected budget shortfall associated with caseload costs. As noted previously, it is expected that most of these costs can be addressed via an allocation from the special purpose appropriation to the Emergency Board.

Caseloads in long-term care facilities are slightly above the level funded in the legislatively adopted budget. In-home and community-based facilities' caseloads are essentially flat, while nursing facilities' caseloads are 3.2% higher. Since nursing care is more expensive, that increase is driving a need for \$7.0 million General Fund and \$23.0 million total funds. A portion of these costs are offset by net savings in nursing facility rates of \$1.8 million General Fund (\$6.0 million total funds). Rates are anticipated to be lower in the second year of the biennium based on projected bed reduction targets; rates were pegged to those targets under House Bill 2216 (2013).

A key budget driver related to APD caseloads are costs per case associated with in-home care. Labor agreements and actions required by federal regulations are increasing hourly costs, while higher acuity and need levels are influencing service levels (hours per client). For some program services, cost per case has grown by as much as 15% over the spring forecast estimate. The approved rebalance plan covers \$13.8 General Fund for overtime pay for home care workers that is being driven by federal labor regulations. Due to wage increases for these same workers, \$3,351,396 General Fund is added and is supported by an allocation from the \$10.7 million General Fund special purpose appropriation for compensation changes driven by collective bargaining for workers who are not state employees. In the approved rebalance plan, savings in community-based care are used to offset some of the in-home need.

Collective bargaining (rate increases) for adult foster care is behind an increase of \$1,241,568 General Fund (\$4.2 million total funds); this increase is also covered by an allocation from the special purpose appropriation for non-state worker collective bargaining. After allocations made in both the DHS and OHA budgets as part of Senate Bill 5701, there is \$700,147 remaining in that special purpose appropriation. It is anticipated that DHS and OHA will request this funding once outstanding bargaining issues are resolved; actual costs may vary based on outcomes.

APD's rebalance plan also includes \$4.0 million General Fund in savings due to the FMAP change noted previously, and another \$5.0 million General Fund savings tied to accessing more federal dollars for newly eligible clients.

To meet federal program requirements, the agency needs \$16.6 million Other Funds expenditure limitation for waived case management services. The approved limitation will help separately track program expenditures and receive the allowed higher match rate.

An expenditure limitation of \$7.0 million Federal Funds is included in the plan to reflect expenditures allowed under OHA's Designated State Health Program (DSHP) waiver associated with Oregon Project Independence.

Technical adjustments and transfers account for a net decrease of \$2.3 million total funds.

#### Intellectual and Developmental Disabilities

The rebalance changes approved by the Subcommittee for the Intellectual and Developmental Disabilities (IDD) program are increases of \$33.2 million General Fund and \$112.3 million Federal Funds expenditure limitation; positions were reduced by 11 (9.92 FTE). The increases cover all but about \$26.2 million General Fund (plus corresponding Federal Funds expenditure limitation) of the agency's current projected budget shortfall associated with caseload costs. As noted previously, it is expected that most of these costs can be addressed via an allocation from the special purpose appropriation to the Emergency Board.

Both caseloads and cost per case in IDD programs are expected to be higher than the previous forecast, driving an overall increase of \$64.6 million General Fund (\$210.3 million total funds). Caseload counts, particularly for children, are well over the spring 2015 forecast. This continues to be directly related to the K Plan, as under that state plan option services must be provided to all eligible applicants. Costs per case also continue to grow as they are driven by assessed client needs and no longer subject to any monetary caps.

The approved rebalance plan includes \$3.0 million General Fund to restore a reduction action taken during 2015-17 budget development. This amount was offered up by the agency as a reduction during session, but was attributed to the wrong program; if left in place the cut eliminates staff supporting children's programs. Participation rate changes for brokerage case management are driving an increase of \$2.1 million General Fund; the Department has a plan to improve participation rates going forward through provider training.

Labor agreements and federal rule changes also drive costs for IDD. Collective bargaining (rate increases) for adult foster care drives an increase of \$2,066,520 General Fund (\$7.0 million total funds). This change is covered by an allocation from the special purpose appropriation for non-state worker collective bargaining. Another allocation from the same source of \$2,133,480 General Fund (\$7.0 million total funds) is also approved to pay bargained wage increases for personal support workers. To address overtime rules also affecting personal support workers, \$3.2 million General Fund is added; this is part of a \$17 million General Fund need (APD and IDD combined) for this issue identified during the 2015 legislative session.

Some savings are available to help partially offset costs. In some parts of the program, Medicaid participation rates have improved and are projected to reduce General Fund spending by \$5.6 million. The change in the FMAP rate is anticipated to save \$4.6 million General Fund.

Technical adjustments and transfers reduce the IDD budget by \$4.6 million General Fund (\$6.2 million total funds) and 11 positions (9.92 FTE), most of which is moving the VR portion of the additional Employment First resources approved for 2015-17 from IDD to VR.



### Program Design Services

In Program Design Services (PDS), the Subcommittee approved a decrease of \$0.2 million General Fund, an increase of \$7.6 million Other Funds expenditure limitation, an increase of \$40.9 million Federal Funds expenditure limitation, and an increase of 32 positions (13.70 FTE). These adjustments include some small technical adjustments, but the changes mostly consist of budget increases needed to cover the next phase of the agency's Integrated Eligibility (IE) information technology project.

In House Bill 5026 (2015), DHS received \$750,000 General Fund (\$7.5 million total funds) for planning to improve eligibility determination systems for non-MAGI (Modified Adjusted Gross Income) Medicaid programs. These programs primarily serve clients in the APD and IDD programs. However, after planning work and a changing information technology landscape due to implementation of OHA's OregonONEligibility (ONE) system, the project approved by the Subcommittee will enhance ONE to support eligibility determinations for the non-MAGI Medicaid programs, plus the Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), and Employment Related Day Care (ERDC) programs.

The additional project funding in Senate Bill 5701 is \$47.9 million total funds. When coupled with the previously authorized planning money, the overall 2015-17 project budget represents about 43% of the overall estimated project cost of \$130 million total funds. Based on current federal match estimates, about 85% of project costs will be covered by federal dollars. In House Bill 5202, the Joint Ways and Means Subcommittee on Capital Construction approved \$7.5 million in proceeds from Article XI-Q Bonds to cover the state share of the project for the current biennium. DHS estimates that the project will take 33 months to execute, with completion targeted for the end of 2018. The 2017-19 state share of the project is estimated at about \$15 million and includes debt service on the 2015-17 bonds. The staffing component of the project is 35 limited duration positions (15.83 FTE), primarily consisting of project managers and operations/policy analysts. These resources would supplement permanent employees (information technology, fiscal, policy, management) that are located in both DHS and OHA; some of these resources had been previously approved for work on other system improvement initiatives and the ONE project.

Both the Joint Committee on Ways and Means Subcommittee on Human Services and the Joint Legislative Committee on Information Management and Technology (JLCIMT) reviewed the project. The JLCIMT recommended incremental, conditional approval of the request and set out several action items, in its recommendation to the Joint Committee on Ways and Means, which were adopted. The Subcommittee approved the project with the understanding that the funding will be unscheduled until the Legislative Fiscal Office and the Chief Financial Office of the Department of Administrative Services approve rescheduling; agency compliance with the JLCIMT recommendations will be key to making expenditure limitation available. Depending on project progress and timing, the Department may be asked to report during the interim to the Emergency Board and/or JLCIMT.

### Central Services

The budget adjustments, associated with technical change and transfers, included in Senate Bill 5701 for Central Services, are net decreases of \$0.3 million total funds and one position (1.00 FTE).

### Shared Services

The Subcommittee approved a net decrease of \$0.8 Other Funds expenditure limitation and 10 positions (5.44 FTE) for Shared Services. Included in this adjustment is the transfer of 11 positions (7.37 FTE) from the Provider Audit Unit within the Office of Payment Accuracy and Recovery

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into OHA Central Services. This change is consistent with guidance from the federal Centers for Medicare and Medicaid Services regarding this unit's responsibility for auditing Medicaid providers.

#### Statewide Assessments and Enterprise-wide Costs

The budget adjustments approved by the Subcommittee include technical adjustments and transfers accounting for an increase of \$5.6 million General Fund (\$9.1 million total funds), primarily to align the assessment budget with 2015-17 policy package changes in program budget structures. There is also an adjustment to align with positions being moved to OHA from DHS Shared Services.

The approved rebalance plan includes \$118,318 General Fund (\$277,566 total funds) to cover Treasury fees. Due to an oversight during 2015-17 budget development, this line item, which is driven by the cost of banking services, was not adequately funded in the base budget. Also accounted for is an adjustment to capture and spend lease revenue, which reduces the need for both General and Federal Funds resources. To match up with the APD budget, \$2.5 million Other Funds expenditure limitation is added to support the budget mechanism for recording waived case management expenditures.

The agency's 2015-17 budget includes \$839,543 General Fund for debt service associated with the Central Abuse Management (formerly known as the Statewide Adult Abuse Data and Report-Writing System) and assumes a bond sale early in the biennium. Current project timing indicates the sale will not need to occur until spring 2017. Based on that timeframe, the debt service is eliminated because it is not needed; this savings amount is not included as a resource within the DHS rebalance plan.

## **JUDICIAL BRANCH**

### Commission on Judicial Fitness and Disability

The Subcommittee increased the General Fund appropriation for extraordinary expenses by \$172,000, equivalent to a 74.8% increase over the level of General Fund in the Commission's 2015-17 legislatively adopted budget. The funds were appropriated to pay the Commission's costs incurred from the investigation and prosecution of two charges of judicial misconduct. The action increases the General Fund appropriation for extraordinary expenses to \$189,753. The revised funding level covers the costs-to-date identified by the Commission, and provides an additional amount of approximately \$20,000 for projected Commission costs associated with the Supreme Court review of the cases. The agency will need to request additional funding later in the biennium, if the costs of completing the two current cases exceed projection, or if the Commission approves any additional cases for formal investigation. If the full appropriation is not needed, any remaining funds will be available to cover extraordinary expenses in the 2017-19 biennium. The General Fund increase was approved on a one-time basis and will be phased out in the development of the agency's 2017-19 budget.

### Judicial Department

The Subcommittee approved increases in total Judicial Department expenditures of \$17,454,547. The expenditure changes include a General Fund increase of \$8,389,259. Budget adjustments include employee compensation adjustments plus the specific items identified below.

The Subcommittee increased the General Fund appropriation for judicial compensation by \$630,000 for the 2015-17 biennium cost of providing a \$5,000 per year salary increase to all statutory judges, beginning on January 1, 2017. The salary increase is enacted by Senate Bill 1597, the 2016 session program change bill. The fiscal impact of the salary increase will increase to \$2,520,000 General Fund beginning with the 2017-19 biennium, when it will be in effect for the full biennium.

A \$200,000 General Fund increase was approved for the Oregon State Bar Legal Assistance Program (Legal Aid) for legal assistance in housing-related issues. As is the practice with unrestricted General Fund appropriations for Legal Aid, this supplemental funding is approved on a one-time basis and will be phased out in the development of the 2017-19 budget. The General Fund appropriation increases combined total 2015-17 biennium state support for Legal Aid, from both Other Funds (court filing fees) and General Fund sources, to \$12,700,000.

The Subcommittee increased the Other Funds expenditure limitation for the State Court Technology Fund (SCTF) by \$5,330,000 for costs of maintaining and supporting state court electronic systems and providing electronic service and filing services. The expenditure limitation increase largely reflects a higher rate of electronic filing of court documents than was anticipated when the Chief Justice's recommended budget was developed. The Department uses SCTF moneys to pay electronic filing charges and does not charge participating parties who file the documents. The SCTF is projected, following this authorization and the mid-biennium transfer of legacy technology fee revenues to the SCTF as required by Senate Bill 1597, to have a 2015-17 biennium ending balance exceeding \$860,000. SCTF resources are not, however, projected to cover costs in subsequent biennia without action to either increase SCTF revenues or reduce ongoing operating costs.

A \$2,800,000 Other Funds expenditure limitation increase was approved for the planning and design of a new Lane County Courthouse facility through the Oregon Courthouse Capital Construction and Improvement Fund (OCCCF). This expenditure limitation amount allows for expenditures of up to \$1.4 million of Article XI-Q bond proceeds and of up to \$1.4 million of required county matching funds for the Lane County Courthouse project. Project bonds are authorized in House Bill 5202. The approved bond authority is in addition to the bond proceeds that were previously authorized for the 2015-17 biennium: \$17.4 million for the Multnomah County Central Courthouse project, \$2.5 million for the Jefferson County Courthouse project, and \$7,875,000 for the Tillamook County Courthouse project. Debt service costs for the Article XI-Q bonds authorized for the Lane County Courthouse project are projected to total approximately \$233,000 General Fund per biennium, beginning in the 2017-19 biennium. Because the bonds will not be issued until the spring of 2017, there will not be debt service payments due in the current biennium.

The approval of Article XI-Q bonds for planning and design of the Lane County Courthouse does not create or imply any commitment to provide state funds for the construction of the facility. The Subcommittee also increased the Judicial Department operations Other Funds expenditure limitation by \$45,000 for the cost of issuance of Article XI-Q bonds for planning and design of the Lane County Courthouse facility.

The Subcommittee approved the following budget note concerning courthouse funding through the Oregon Courthouse Capital Construction and Improvement Fund:



**Budget Note:**

The Chief Justice or his designee is requested to present a report to the Emergency Board, no later than December 2016, with a priority ranking and the projected costs of courthouse capital construction projects for which he may, within the next twelve years, request state funding support from the Oregon Courthouse Capital Construction and Improvement Fund. The report shall include recommendations for stabilizing biennial funding request amounts over the ten-year period beginning with the 2019-21 biennium.

**Public Defense Services Commission**

The Subcommittee increased the General Fund appropriation for the Contract and Business Services Division by \$18,834. The appropriation funds payment of a Secretary of State service charge that was omitted from the agency budget in error.

**LEGISLATIVE BRANCH**

The Subcommittee approved a net-zero General Fund rebalance. The adjustments include reductions to agency budgets to account for higher than anticipated reversions from the 2013-15 biennium, a \$180,000 increase for chamber improvements, and an increase of \$6.7 million in Legislative Administration for facilities projects. Unused bond proceeds of \$2.4 million are used to pay debt service in lieu of General Fund. The facilities projects will be the beginning of a \$50 million Capitol project that will make improvements to the mechanical, electrical, and plumbing systems; address security and life safety issues; and increase accessibility for people with disabilities. It is expected to take three years for all of the improvements to be completed. House Bill 5202 includes \$30 million in Article XI-Q bonds to continue the project into the 2017-19 biennium. The expenditure limitation for those bond proceeds are included in House Bill 5203, which is the bill for all capital construction limitations. The Subcommittee approved an Other Funds expenditure limitation of \$460,000 for the cost of issuance for the bonds. There is no debt service in the current biennium.

The Subcommittee also approved two new Other Funds expenditure limitations related to the Oregon Capitol Foundation. The Foundation is now a separate entity from the Legislative Administration Committee. The limitations include \$300,000 for the History Gateway and \$25,000 for expenses related to operations for the Foundation.

**NATURAL RESOURCES**

**Department of Agriculture**

The Subcommittee established a Federal Funds expenditure limitation of \$175,000 in the Administrative and Support Services program area to accommodate the awarding of a federal grant to be used for wolf depredation compensation claims, and for nonlethal preventative techniques.

The Subcommittee also increased Federal Funds expenditure limitation by \$1,700,000 and made a one-time \$539,338 General Fund appropriation as state match to pay for eradication efforts related to the Asian Gypsy Moth, a non-native invasive species, which was found in northwest Portland. The majority of the eradication project would occur during May and June of this year. On January 14, 2016, the U.S. Department of

Agriculture (USDA) notified the Department that \$1.7 million in federal funding would be made available for the eradication project. In the past, USDA has provided only 50% of eradication funding.

The Subcommittee also acknowledged that the Department anticipates increasing the wholesale seed dealer license from \$500 to \$750 in May 2016, and increasing the veterinary product registration fee from \$75 to \$100 in June 2016. The Other Funds revenues from these increases will be used, in part, to fund program compensation increases.

### **Columbia River Gorge Commission**

The Subcommittee increased the General Fund appropriation made to the Columbia River Gorge Commission by \$11,308 to match the amount provided to the Commission by the State of Washington for the 2015-17 biennium for operational costs. Included in the \$11,308 increase is \$6,000 for costs related to a once every five year audit; this amount is considered to be one-time and is not to be included in the base budget for 2017-19 budget development. The Subcommittee also eliminated the Commission's \$5,000 Other Funds expenditure limitation provided in the adopted Oregon budget since any non-General Fund revenues received by the Commission are expended through the Washington budget.

### **Department of Environmental Quality**

The Subcommittee approved a one-time \$100,000 General Fund appropriation for sampling, testing, and monitoring Harmful Algae Blooms. Of the total, \$30,000 will be used to purchase testing equipment so that samples do not need to be sent out of state for processing.

The Subcommittee also approved \$230,000 General Fund, on a one-time basis, to provide information for the 2017 legislative session on how a market-based carbon reduction system would work in Oregon. The money would be used to hire a full-time limited duration Operations and Policy Analyst 4 position (0.58 FTE). In addition, \$50,000 is to cover costs for an economic consultant to assist with research data and analysis. The DEQ work is to include:

- (1) Identify the type, scope, and design of the greenhouse gas emissions cap necessary to link with other jurisdictions and meet the state's greenhouse gas emissions reduction goals.
- (2) Assess how a market-based program would interact with existing programs, such as the Renewable Portfolio Standard, the Clean Power Plan, and the Clean Fuels program, and achieve the state's greenhouse gas emissions reduction goals.
- (3) Study and evaluate how existing market-based programs in other jurisdictions control leakage and how those methods might be adapted to align with Oregon's economy and business sectors.
- (4) Study and evaluate how existing market-based programs address potential impacts and benefits to disadvantaged populations and rural communities and how those methods might be adopted to Oregon.

The Subcommittee approved a \$2,500,000 General Fund appropriation to expand the Department's current Oregon Air Toxics Program. This will allow the immediate focus of increased air toxics monitoring efforts on cadmium, arsenic, and chromium hotspots in Portland, as well as, expand air toxics monitoring across the state. In addition, the increased funding will allow DEQ to develop a risk-based approach to air permitting for industrial sources through rulemaking. Over time this will allow DEQ to modify existing air permits to be risk-based. The air toxics monitoring funded through this appropriation uses moss collection and analysis to map pollution levels in Portland communities and develop maps of hot spots. This funding will allow the Department to purchase and set up two additional full air toxics monitoring stations that can be directed at areas with high levels of air toxics that are identified. A Natural Resources Specialist 3 position, three Natural Resources Specialist 2 positions, a

Chemist 2 position, and a Chemist 3 position are added as permanent positions for the monitoring and analysis work. DEQ will also use the funding to develop, through rulemaking, an Oregon specific air toxics program that ensures industrial hot spots are sufficiently controlled. During this process, discussions with local governments about their potential roles and involvement, either formally or informally, may occur. To work on this part of the program, six permanent positions were added (Principal Executive Manager E, Program Analyst 3, Natural Resources Specialist 4, Natural Resources Specialist 3, Operations and Policy Analyst 1, and Public Affairs Specialist 2). In all, 12 permanent positions (7.00 FTE) were added, with total Personal Services costs of \$1,266,789, Services and Supplies costs, including Professional Services, of \$883,211 and \$350,000 in Capital Outlay for monitoring equipment. This program is estimated to have a 2017-19 roll-up cost of \$3,626,239 General Fund.

### **Department of Fish and Wildlife**

The Subcommittee approved a one-time increase of \$180,000 Other Funds expenditure limitation to continue two limited-duration Natural Resource Specialist 2 positions authorized for one year in Senate Bill 5544 (2015). These two positions work with landowners to improve and protect sage grouse habitat.

### **Department of Forestry**

The Subcommittee approved an increase of \$23,115,122 in the General Fund appropriation made to the Department of Forestry, Fire Protection Division for the payment of emergency firefighting costs associated with the 2015 forest fire season. This amount is dedicated to the following specific uses:

- Unbudgeted emergency fire costs (\$19,558,783)
- Fire protection district deductibles (\$677,886)
- Training provided to Oregon National Guard troops (\$500,000)
- Oregon State Treasury loan interest (\$323,630)
- Severity resources (\$2,054,823)

The portion of the General Fund appropriation to the Department of Forestry included above for severity resources is offset by a reduction of the same amount in the special purpose appropriation that had been established for this purpose. In addition, Other Funds expenditure limitation is increased by \$56,334,408, which includes \$55,172,387 for unbudgeted emergency fire costs and \$1,162,021 for fire protection district deductibles.

The Subcommittee approved a decrease in the General Fund appropriation of \$238,581 and a decrease in the Other Funds expenditure limitation of \$726,392 made to the Oregon Department of Forestry for the payment of debt service. These amounts were originally included in the agency's budget for the payment of debt service obligations on bonds that were anticipated to be issued at the end of the 2013-15 biennium, but were not. This is a technical adjustment to remove the excess General Fund and Other Funds expenditure limitation from the agency's budget. An increase of \$45,000 Other Funds expenditure limitation was approved for the payment of bond issuance costs related to Article XI-Q General Obligation bonds to replace an equipment warehouse for the East Lane Fire Protection District.

The Subcommittee approved a General Fund appropriation of \$704,286 and an increase in the Other Funds limitation of \$813,594 for the implementation of a procurement and payment system replacement. The new system is intended to be an end-to-end solution for the agency, replacing its current ad-hoc system of manual and semi-automated information systems and processes. The funding includes the establishment of

four, 15-month, limited-duration positions (Project Manager 3, Information Systems Specialist 6, Accountant 1, and Procurement and Contract Specialist 3). The Subcommittee approved the project with the understanding that the funding will be unscheduled until the Legislative Fiscal Office (LFO) and the Chief Financial Office of the Department of Administrative Services approve rescheduling and that the agency comply with recommendations made by the Joint Legislative Committee on Information Management Technology (JLCIMT).

Recommendations include direction that the agency proceeds through the standard Stage Gate 3 process, including updated business case and other foundational documents. The agency will ensure that the independent quality management services contractor conducts an updated risk assessment and perform quality control reviews on the documents noted above. The agency will report back to JLCIMT or Emergency Board on project status in September 2016.

#### **Department of Land Conservation and Development**

The Subcommittee approved an increase in the Other Funds expenditure limitation of \$216,000 to allow the agency to expend sub-grant funding received from the Oregon Office of Emergency Management made available through the Federal Emergency Management Agency. These funds will be used to aid in the development of local pre-disaster mitigation plans of local governments, including the cities of Albany, Medford, and Beaverton, Tillamook County, and cities within Tillamook County. A portion of this amount will be used to establish a limited duration Planner 2 position for 16 months (0.67 FTE).

#### **Department of State Lands**

In the fall of 2015, sump pumps and the associated drainage pipe failed at the Department of State Lands' headquarters building in Salem. The Department made emergency, stop-gap repairs. The Subcommittee approved a one-time \$85,919 increase to the Capital Improvement Other Funds expenditure limitation for the repairs to date. Additional permanent repairs will be needed next summer; the Department will seek another expenditure limitation increase at an Emergency Board meeting.

The Department was awarded a U.S. Environmental Protection Agency grant for Wetland Program Development in the amount of \$347,502. During the 2015 legislative session, \$133,000 in one-time Federal Funds expenditure limitation was approved and unscheduled for this grant, pending retroactive approval to apply for the grant. This amount was intended to provide sufficient expenditure limitation for work through March, 2016. The Subcommittee approved the additional \$214,502 in one-time Federal Funds expenditure limitation to enable the Department to complete the work.

A reduction in Attorney General charges to reflect reduced rates in the legislatively adopted budget was inadvertently made to the Capital Improvement limitation and should have been made to the Common School Fund limitation. Other Funds expenditure limitation is decreased by \$176,890 for the Common School Fund and an increase of the same amount is made to Capital Improvements.

#### **Water Resources Department**

The Subcommittee approved an increase in General Fund of \$705,288 to facilitate a groundwater study for the greater Harney Valley in coordination with the U.S. Geological Survey. The funding will support the establishment of a permanent Natural Resource Specialist position (\$130,288), one-time funding of \$400,000 for the drilling and construction of ten observation wells for data collection, and one-time funding of \$175,000 for the cost-sharing provisions of the groundwater study.

### **Oregon Watershed Enhancement Board**

The Subcommittee increased the Measure 76 Lottery Funds expenditure limitation for operations by \$40,123 to pay the costs of reclassifying the Administrative Manager position from an Administrative Specialist 2 to a Principal Executive Manager A and reclassifying the Capacity Coordinator from an Operations Policy Analyst 3 to an Operations Policy Analyst 4. The reclassifications are due to increased duties that resulted from an agency reorganization. These reclassifications were reviewed and supported by Department of Administrative Services Human Resources. In addition, Measure 76 Lottery Funds expenditure limitation was increased by \$17,329 to correct an error that omitted capital mall security assessments in the legislatively adopted budget for 2015-17.

## **PUBLIC SAFETY**

### **Department of Corrections**

The October, 2015 male prison population forecast was as much as 200 beds higher than the April 2015 forecast, which was the basis for the 2015-17 budget. In response to the higher forecast, the Subcommittee approved \$2,558,694 General Fund and 6 new correctional officer positions (4.46 FTE) to shift the 787 Deer Ridge Correctional Institution minimum security inmates to the medium security facility, which will be operated as minimum housing. Of this amount, \$1,821,701 is a one-time expense. As the additional recently-forecasted inmates enter the system, there will be other housing units within the facility available to accommodate them. The additional costs for 200 more beds for the rest of the biennium is about \$6.9 million.

A special purpose appropriation to the Emergency Board in the amount of \$3 million can fund part of the remaining need. There will be two more forecasts before the end of the biennium, April and October 2016. Whatever unfunded amount remains can be considered as part of the Department's agency-wide budget rebalance that typically occurs during the long legislative session as part of the current biennium final statewide budget reconciliation.

In response to an investigation of housing and treatment conditions for seriously mentally ill inmates by the federal protection and advocacy entity, Disability Rights Oregon, the Department requested \$8.2 million General Fund for architectural and staffing changes. The Subcommittee approved \$3,139,557 General Fund for construction and staffing that will provide the identified inmates more out-of-cell time and increased mental health therapy and counseling. The direct appropriation includes \$1,031,676 for permanent staff, including 4 registered nurses and a project manager (3.33 FTE); reclassification of a corporal to a sergeant; and associated services and supplies. The remaining \$2,107,881 General Fund is for one-time construction expenses for a modular building for treatment and office space on the Oregon State Penitentiary grounds and for changes inside the mental health unit of the penitentiary.

In addition, a special purpose appropriation to the Emergency Board in the amount of \$2 million will be available for the Department to request as they need additional staff. Any unfunded balance can be considered as part of the Department's agency-wide budget rebalance that typically occurs during the long legislative session as part of the current biennium final statewide budget reconciliation.

The Subcommittee approved redirecting unused Junction City Correctional Institution bond funding and unneeded cost of issuance funds for various Department of Corrections bond sales to Other Funds debt service. The total Other Funds limitation is \$2,094,636.

Pilot project General Fund that was intended to be one-time is phased out from the Offender Management and Rehabilitation unit within the Department. The reduction is \$1,009,135.

### **Criminal Justice Commission**

The Criminal Justice Commission was awarded \$370,000 in one-time grant funding from the U.S. Department of Justice, Office of Justice Programs and Bureau of Justice Assistance for technical assistance financing in support of Oregon's Justice Reinvestment implementation. The funds were made available to Oregon by a pass-through agreement with the Vera Institute of Justice, a private nonprofit research center for justice policy and practice. The funding was included in the agency's 2015-17 Federal Funds expenditure limitation, but because the Vera Institute is not a federal agency, the funding should have been included as Other Funds expenditure limitation. This technical adjustment increases Other Funds and decreases Federal Funds expenditure limitations by \$370,000.

### **Oregon Department of Justice**

The Subcommittee approved an increase of \$254,493 Other Funds expenditure limitation for the Department of Justice (DOJ) Criminal Justice Division and the authorization of two limited duration positions (1.08 FTE) for the Fusion Center. Funding for the positions would come from two separate federal grants received by the Oregon Military Department Office of Emergency Management (State Homeland Security Program for \$121,334 and the Urban Area Security Initiative for \$133,159). The grants are one-time in nature and require no state matching funds.

The Subcommittee approved an increase of \$129,405 Other Funds expenditure limitation for the DOJ Criminal Justice Division and the authorization of one limited duration position (0.25 FTE) for a traffic safety resource prosecutor with an emphasis on marijuana. The position is funded for six months beginning in April of 2016. The source of the grant is the U.S. Department of Transportation National Highway Traffic Safety Administration received by the Oregon Department of Transportation.

The Subcommittee approved an increase of \$184,714 Other Funds expenditure limitation for the DOJ General Counsel Division and the authorization of one permanent full-time position (0.63 FTE) for a marijuana civil legal services attorney. The revenue source to support the attorney is the legal services rate billed to state agencies. The 2017-19 biennial cost of the position is \$316,891.

An increase of \$12,613,368 Federal Funds expenditure limitation for the DOJ Crime Victims Services Division, as well as the authorization of two limited duration positions (1.42 FTE) for an increase in Victim of Crime Act (VOCA) assistance funding was approved. The grant increase will add one-time funding to existing direct service/non-profit providers, district attorney prosecutor-based victim assistance programs, child assessment centers, and other system investments. These are formula grants that require no state matching funds; however, a federal requirement does require sub-grantees to provide 20% matching funds. According to the Department, for this request, no additional state funds will be required to help sub-grantees meet their matching funds requirement.

The Subcommittee approved \$676,971 General Fund for the establishment of an elder abuse program in the Criminal Justice Division. The program will be staffed by one permanent full-time Senior Assistant Attorney General (Elder Abuse Resource Prosecutor) (0.63 FTE) and two



Criminal Investigator positions (1.25 FTE). The positions will assist local law enforcement with elder abuse cases, as well as provide statewide outreach and training. Personal services costs for the positions total \$457,573 and services and supplies costs total \$219,398. The 2017-19 biennial cost of the program is estimated to be \$1.2 million General Fund.

A change in the preliminary schedule for the DOJ Child Support Division's Child Support Enforcement Automated System (CSEAS) information technology project, which was completed after the close of the 2015 session, has increased the total cost of ownership and impacted the project's 2015-17 legislatively adopted budget, resulting in a shortfall of bonding authority, expenditure limitation(s), and cash liquidity.

The original feasibility study for the CSEAS project estimated total development costs at \$92.7 million and recurring costs after development of \$23.6 million for a total cost of ownership (TCO) of \$116.3 million (through fiscal year 2026). The rebaselined TCO is now estimated at \$122.7 million, which includes \$12 million in ongoing operations and maintenance costs. The Subcommittee approved \$3,086,760 of Other Funds expenditure limitation for project costs, which is to be financed with Article XI-Q bonds approved in House Bill 5202, and the establishment of 10 permanent part-time positions (1.31 FTE). Four reclassifications of existing permanent full-time positions was also approved.

Unless otherwise approved by the Legislature or the Emergency Board, the positions budgeted for the project are established as permanent fulltime positions under the following conditions: (a) the positions will be abolished on or before the completion of the project; (b) the positions are to remain in the CSEAS program (i.e., CSEAS summary cross reference) and may not be transferred to any other program or used for any other purpose than the development of the CSEAS project; and (c) the positions may not be included in any permanent finance plan action.

The Subcommittee appropriated \$1,161,194 in additional General Fund Debt Service to support repayment of Article XI-Q General Obligation bond proceeds approved in House Bill 5202. Other Funds expenditure limitation of \$123,240 is included for the cost of issuance of the bonds. The Subcommittee approved \$34,683 General Fund for repayment of interest costs for a short-term Treasury loan. The Department of Administrative Services was directed to unschedule \$3,086,760 Other Funds expenditure limitation (Article XI-Q bond project proceeds) and to schedule \$3,632,932 Other Funds and \$6,864,723 Federal Funds for the second quarter of calendar year 2016.

In absence of a comprehensive, integrated, and rebaselined master schedule, which is necessary to determine the project budget, and final Stage Gate 3 approval, the Subcommittee recommended a conservative, controlled release funding approach for the project. The recommendation provides full project funding through June 30, 2016, at which point the agency will need to request additional expenditure limitation from the Emergency Board. This recommendation will allow the agency to initially proceed to Stage Gate 3; however, the project should not operate for an extended period of time until "Stage Gate 3" review is officially completed and full endorsement granted. The Subcommittee adopted the Joint Legislative Committee on Information Management and Technology recommendations for the project.

The Subcommittee also approved the following budget note:

**Budget Note:**

The Department of Justice is to report at each meeting of the Emergency Board and the Interim Joint Committee on Information Management and Technology at each interim meeting with detailed project status reports (performance against plan) on the Child Support Enforcement Automated System (CSEAS). As part of the agency's report for the Emergency Board meeting in May of 2016, the agency is

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to: (a) justify why an advisory steering committee is an appropriate form of governance; (b) provide a detailed cost-benefit analysis of the decision to use a private vendor vs. Department of Administrative Services State Data Center; (c) provide a justification for the indirect agency administrative charges to the CSEAS project, which may need to be repurposed and used for a general project contingency fund; and (d) report on improvements to quality assurance and agency status reporting.

**Oregon Military Department**

The Other Funds expenditure limitation for the Community Support program was increased, on a one-time basis, by \$2,442,000 for the reimbursement of firefighting expenditures incurred during the 2015 fire season.

The 2015-17 legislatively adopted budget inadvertently made a General Fund reduction to services and supplies that should have been applied to personal services. The reduction is \$57,929 within the Administration division. Moving it to the right budget category will enable the agency to correctly build the 2017-19 budget.

The Subcommittee approved \$80,000 Other Funds expenditure limitation for the purpose of paying cost of issuance expenses associated with Article XI-Q bond authority approved for rehabilitating facilities at the Umatilla Depot site to prepare it for use as a Regional Training Center. The Umatilla site will replace the facility currently used on the Western Oregon University campus.

**Department of Public Safety Standards and Training**

The Subcommittee approved an increase in Other Funds expenditure limitation of \$959,000 and the addition of three limited-duration positions (1.74 FTE) to support programs and activities in the Department of Public Safety Standards and Training's (DPSST) Center for Policing Excellence, funded by an Edward Byrne Memorial Justice Assistance Grant through the Criminal Justice Commission.

The agency's Federal Funds expenditure limitation was increased by \$2,497,563. This net-zero technical correction changes a revenue-only transfer between DPSST and the Department of Justice to a pass-through expenditure, a budgetary change required in order to ensure full reimbursement of costs related to the federal High Intensity Drug Trafficking Area program operated by the state Department of Justice.

The Subcommittee increased the agency's Other Funds expenditure limitation by \$2,790,195, and authorized twelve permanent positions (8.00 FTE) to add four basic police and two basic corrections classes to the agency's training calendar to meet demand during the 2015-17 biennium.

**Oregon State Police**

The Subcommittee increased the agency's General Fund appropriation by \$1,320,216 and increased its Other Funds expenditure limitation by \$6,911,613 for Federal Emergency Management Agency-reimbursable expenses incurred during numerous mobilizations coordinated by the State Fire Marshal during the 2015 fire season in Oregon.

The Subcommittee increased the agency's General Fund appropriation by \$1,000,000 and authorized 12 positions (6.63 FTE) to increase staff capacity and reduce wait times and backlogs in the Firearm Instant Check System program.



## TRANSPORTATION

### Department of Aviation

The Subcommittee approved an increase of \$265,000 in Other Funds expenditure limitation for the Operations Division to purchase grant management software to implement and manage the agency's grant-making program established by House Bill 2075 (2015).

### Department of Transportation

The Subcommittee increased the agency's Other Funds expenditure limitation by \$6,231,467 to fund road repairs and clean-up expenses at seventeen sites across the state where wildfires damaged and forced the closure of roadways during the 2015 fire season. Other Funds expenditure limitation was increased in the Local Government program by \$2,000,000 toward reconstruction of the Juntura Cut-Off Road in Harney County, and by \$51,804 for cost of issuing the Lottery Bonds to finance the project.

A net-zero technical adjustment of \$1,354,734 was approved to move cost of issuance expenditure limitation for debt associated with highway safety improvements, the Coos Bay Rail Link, and ConnectOregon VI into the correct program budgets. A second net-zero technical adjustment of \$138,433 was approved to move legislatively-approved state government service charge reductions into the correct program budgets for the 2015-17 biennium.

The Subcommittee reduced the General Fund appropriation for debt service to the Department of Transportation by \$5,194,781. A bond sale anticipated for May, 2015 was postponed until May, 2016, reducing the debt service required in the 2015-17 biennium. General Fund was also reduced by \$47,835 to reflect the completion of the Driver and Motor Vehicles' veteran information sharing project with the Department of Veterans' Affairs.

**Legislative Fiscal Office**

900 Court St. NE, H-178  
Salem OR 97301  
503-986-1828



**Oregon Legislative  
Emergency Board**

Sen. Peter Courtney, Senate Co-Chair  
Rep. Tina Kotek, House Co-Chair

**Certificate**

May 25, 2016

Pursuant to the provisions of ORS 291.328, and acting under the authority of ORS 8.105; ORS 291.326(1)(a), (b), (c), and (d); ORS 276.390; ORS 291.371; and ORS 291.375; this hereby certifies that the Emergency Board, meeting on May 25, 2016, took the following actions:

1. **Commission on Judicial Fitness and Disability**  
Acknowledged receipt of a report on compensation plan changes.
2. **Public Defense Services Commission**  
Deferred consideration of a request to fund salary increases.
3. **Department of Education**  
Acknowledged receipt of a report on the implementation of the mixed delivery preschool program.
4. **Department of Education**  
Approved the submission of a federal grant application to the U.S. Department of Health and Human Services in an amount of up to \$75,000 for a Child Care and Development Block Grant Implementation Research and Evaluation Planning Grant.
6. **Department of Education**  
Allocated \$273,062 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015 to supplement the appropriation made to the Department of Education by section 1(1), chapter 759, Oregon Laws 2015, Operations, for grants to school districts to improve Internet connectivity and access, with the understanding the Department of Administrative Services will unreschedule that amount until school districts and the Department of Education have been notified of the approval of the federal funding.
7. **Higher Education Coordinating Commission**  
Acknowledged receipt of a report on 2016-17 proposed increases to resident undergraduate tuition and mandatory fees at public universities.
8. **Higher Education Coordinating Commission**  
Acknowledged receipt of a report relating to the distribution of funding for Community College academic counselors.

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9. **Department of Human Services**  
Approved the submission of a federal grant application to the U.S. Department of Health and Human Services in the amount of \$206,000 per year for two years to enhance adult protective services.
10. **Department of Human Services**  
Approved the submission of a federal grant application to the U.S. Department of Health and Human Services in the amount of \$200,000 per year for two years to enhance the state's system for providing information on and access to long term services and supports.
11. **Department of Human Services**  
Acknowledged receipt of a report from the Department of Human Services on program sustainability options and actions.
12. **Oregon Health Authority**  
Acknowledged receipt of a report on the Oregon Health Plan 1115 waiver renewal for 2017-22.
13. **Oregon Health Authority**  
Acknowledged receipt of a report on recommendations regarding the Medicaid Management Information System and related systems and interfaces.
14. **Oregon Health Authority**  
Approved, retroactively, the submission of a supplemental federal grant application to the Centers for Disease Control and Prevention in the amount of up to \$2.7 million for one year beginning August 1, 2016 for the Epidemiology and Laboratory Capacity Program grant to combat antibiotic-resistant organisms and diseases as well as the Zika virus.
15. **Oregon Health Authority**  
Approved, retroactively, the submission of a federal grant application to the Centers for Disease Control and Prevention in the amount of up to \$250,000 a year for two years beginning September 1, 2016 for the Models for Collaboration for State Chronic Disease and Oral Health Programs grant to develop chronic disease prevention projects that integrate activities from both chronic disease and oral health programs.
16. **Oregon Health Authority**  
Approved the submission of a federal grant application to the Centers for Disease Control and Prevention in the amount of up to \$3.5 million a year for five years beginning January 1, 2017 for the Emerging Infections Program grant to help monitor and prevent foodborne diseases, invasive bacterial infections, influenza, pertussis, human papillomavirus virus (HPV) disease, and healthcare-associated infections.
17. **Oregon Health Authority**  
Approved the submission of the following three related federal grant applications by the Oregon Health Authority to the Substance Abuse and Mental Health Services Administration: 1) the Strategic Prevention Framework for Prescription Drugs grant in

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the amount of \$373,616 a year for five years beginning January 1, 2017 to support and complement existing infrastructure building work partnering with coordinated care organizations to deliver provider and patient education to prevent prescription drug misuse; 2) the Grant to Prevent Prescription Drug/Opioid Overdose-Related Deaths in the amount of \$1 million a year for five years beginning January 1, 2017 to reduce the number of prescription drug/opioid overdose-related deaths and adverse events by training first responders and other key community sectors in prevention strategies, including the purchase and distribution of naloxone; and 3) the Targeted Capacity Expansion: Medication Assisted Treatment-Prescription Drug and Opioid Addiction grants cooperative agreement in the amount of \$1 million a year for five years beginning January 1, 2017 to expand and enhance access to integrated medication assisted treatment (e.g. buprenorphine, methadone, naltrexone) for individuals with opioid use disorder.

**18. Board of Nursing**

Increased the Other Funds expenditure limitation established for the Board of Nursing by section 1, chapter 439, Oregon Laws 2015, by \$244,452 and authorized the establishment of two full-time permanent positions (1.58 FTE) for personnel reclassifications and increased workload requirements.

**19. Department of Justice**

Acknowledged receipt of a report on the Child Support Enforcement Automated System information technology project, with instructions, and directed the agency to report to the Emergency Board in September of 2016.

**20. Department of Justice**

Increased the Federal Funds expenditure limitation established for the Department of Justice by section 13, chapter 837, Oregon Laws 2015, by \$2,538,107 for supplemental funding for the Child Support Enforcement Automated System information technology project, with the understanding that the Department of Administrative Services will un-schedule the limitation increase and will only re-schedule upon the joint approval of the Office of State Chief Information Officer, Chief Financial Officer, and Legislative Fiscal Office.

**21. Department of Public Safety Standards and Training**

Increased the Other Funds expenditure limitation established for the Department of Public Safety Standards and Training by section 2, chapter 658, Oregon Laws 2015, by \$337,000 for crisis intervention training for first responders.

**22. Department of Public Safety Standards and Training**

Increased the Other Funds expenditure limitation established for the Department of Public Safety Standards and Training by section 2, chapter 658, Oregon Laws 2015, by \$100,000 for additional training for 911 telecommunicators.

**23. Military Department**

Increased the Other Funds expenditure limitation established for the Military Department by section 2(4), chapter 594, Oregon Laws 2015, Community support, by \$256,000 and increased the Federal Funds expenditure limitation established for the

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Military Department by section 3(3), chapter 594, Oregon Laws 2015, Community support, by \$518,000 for supplemental funding for the Oregon Youth Challenge Program.

**24. Military Department**

Increased the Federal Funds expenditure limitation established for the Military Department by section 3(3), chapter 594, Oregon Laws 2015, Community support, by \$270,000 for supplemental federal funds received for the STARBASE Program.

**25. Military Department**

Allocated \$170,000 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015 to supplement the appropriation made to the Military Department by section 1(2), chapter 594, Oregon Laws 2015, Operations, for roof repairs at the Forest Grove and Kliever armories, and directed the Department to use \$500,000 of one-time General Fund savings available within current appropriations for the state's 50% share of the roof repairs.

**26. Department of State Police**

Approved the submission of a federal grant application to the U.S. Department of Justice in the amount of \$1.04 million over three years to establish a computerized system to track the inventory and processing of sexual assault forensic evidence kits in possession of the Department of State Police.

**27. Department of State Police**

Approved, retroactively, the submission of a federal grant application to the U.S. Department of Justice in the amount of \$9.4 million for up to eighteen months to replace the CrimeVue criminal history database and messaging system.

**28. Department of State Police**

Established a General Fund appropriation for the Department of Administrative Services and allocated \$73,053 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015 and \$2,000,000 from the special purpose appropriation made to the Emergency Board by section 109 (1), chapter 82, Oregon Laws 2016, to the newly established appropriation for costs associated with the unlawful occupation of the Malheur National Wildlife Refuge in Harney County, for distribution to state and local agencies to reimburse for expenses incurred during the occupation; and increased the Other Funds expenditure limitation established for the Department of State Police by section 2(1), chapter 696, Oregon Laws 2015, Patrol services, criminal investigations and gaming enforcement, by \$874,188 in order to receive reimbursements due the agency from the Department of Administrative Services.

**29. Criminal Justice Commission**

Approved, retroactively, the submission of a federal grant application to the U.S. Department of Justice in the amount of up to \$1.75 million for three years to support Oregon's Justice Reinvestment efforts.

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**30. Department of Corrections**

Acknowledged receipt of a report on female and male prison population trends and system bed capacity.

**31. Department of Corrections**

Allocated \$1,973,714 from the special purpose appropriation made to the Emergency Board by section 41(1), chapter 82, Oregon Laws 2016 to supplement the appropriation made to the Department of Corrections by section 1(1), chapter 655, Oregon Laws 2015, Operations and health services; allocated \$261,870 from the special purpose appropriation made to the Emergency Board by section 41(1), chapter 82, Oregon Laws 2016 to supplement the appropriation made to the Department of Corrections by section 1(2), chapter 655, Oregon Laws 2015, Administration, general services and human resources; allocated \$764,416 from the special purpose appropriation made to the Emergency Board by section 41(1), chapter 82, Oregon Laws 2016 to supplement the appropriation made to the Department of Corrections by section 1(3), chapter 655, Oregon Laws 2015, Offender management and rehabilitation; and authorized the establishment of 33 positions (18.64 FTE); for the Department to continue activating minimum security prison beds at the Deer Ridge Correctional Institution.

**32. Department of Corrections**

Allocated \$100,000 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015 to supplement the appropriation made to the Department of Corrections by section 1(1), chapter 655, Oregon Laws 2015, Operations and health services; allocated \$900,000 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015 to supplement the appropriation made to the Department of Corrections by section 1(2), chapter 655, Oregon Laws 2015, Administration, general services and human resources; and increased the Other Funds expenditure limitation established for the Department of Corrections by section 2(1), chapter 655, Oregon Laws 2015, Operations and health services, by \$100,000 to begin preparing the Oregon State Penitentiary-Minimum to house women offenders in the current biennium.

**33. Oregon Business Development Department**

Approved, retroactively, the submission of a federal grant application to the U.S. Small Business Administration in the amount of \$562,500 for funds available under the State Trade Expansion Program (STEP), and authorized the agency to submit future annual applications for STEP program grants if those grants: 1) are used to expand the Oregon Trade Promotion Program; 2) do not require the state to maintain any funded program levels after expiration of the grant; and 3) do not include match requirements that require additional Lottery Funds support or a reduction in the agency's other program services.

**34. Oregon Business Development Department  
Higher Education Coordinating Commission**

Acknowledged receipt of a report on a business plan for the American Manufacturing Innovation District; increased the Other Funds expenditure limitation established for the Oregon Business Development Department by section 1(8), chapter 82, Oregon Laws 2016, for the American Manufacturing Innovation District, by \$2,499,999; increased the Other Funds capital construction expenditure limitation established for the Higher

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Education Coordinating Commission by section 7, chapter 67, Oregon Laws 2016, for the American Manufacturing Innovation District building at Portland Community College, by \$4,999,999; and increased the Other Funds expenditure limitation established for the Higher Education Coordinating Commission by section 5(1), chapter 642, Oregon Laws 2015, Operations, degree authorization and private career schools, by \$70,000; for development of the Oregon Manufacturing Innovation Center, with the understanding the agencies will present a progress report on the Oregon Manufacturing Innovation Center to the Joint Committee on Ways and Means during the 2017 session.

**36. Housing and Community Services Department**

Approved, retroactively, the submission of two federal grant applications to the U.S. Treasury in the combined amount of \$94,535,564 for assistance to Oregonians affected by foreclosure.

**37. Employment Department**

Approved, retroactively, the submission of a federal grant application to the U.S. Department of Labor in the amount of \$250,000 for the expansion and diversification of registered apprenticeship opportunities in Oregon.

**38. Columbia River Gorge Commission**

Allocated \$5,000 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015, to supplement the appropriation made to the Columbia River Gorge Commission by section 1, chapter 189, Oregon Laws 2015, to match the operational budget of the Commission as provided by the State of Washington for the 2015-17 biennium.

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**40. Department of Geology and Mineral Industries**

Acknowledged receipt of a report on the progress of the tactical IT remediation plan; allocated \$554,808 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015 to supplement the appropriation made to the Department of Geology and Mineral Industries by section 1, chapter 657, Oregon Laws 2015 for implementation of the plan; authorized the establishment of two positions (1.00 FTE); and increased the Other Funds expenditure limitation established for the Department of Geology and Mineral Industries by section 2(2), chapter 657, Oregon Laws 2015, Mined land reclamation, by \$64,754 for the Mined Land Reclamation and Regulation program.

**41. Department of Fish and Wildlife**

Approved, retroactively, the submission of a federal grant application to the U.S. Fish and Wildlife Service in the amount of \$1 million to acquire a forest conservation easement for 1,751 acres near Ashland, Oregon.

**42. Department of Environmental Quality**

Approved the submission of a federal grant application to the U.S. Environmental Protection Agency in the amount of \$250,000 for pollution prevention technical assistance services as well as projects that reduce and eliminate pollution from water, air, and land.



43. **Department of Environmental Quality**  
Allocated \$225,000 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015, to supplement the appropriation made to the Department of Environmental Quality by section 1(1), chapter 593, Oregon Laws 2015, Air Quality, to acquire metals and particulate monitoring equipment.
44. **Department of Forestry**  
Allocated \$2,176,549 from the special purpose appropriation made to the Emergency Board by section 5, chapter 809, Oregon Laws 2015, to supplement the appropriation made to the Department of Forestry by section 1(1), chapter 809, Oregon Laws 2015, Fire protection, for the payment of the catastrophic fire insurance premium for the 2016 fire season.
46. **Department of Forestry**  
Allocated \$250,000 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015, to supplement the appropriation made to the Department of Forestry by section 1(2), chapter 809, Oregon Laws 2015, Private forests, to provide additional preventative treatments for *Phytophthora Ramorum* infestations and for a \$50,000 grant to the Association of Oregon Counties.
47. **Parks and Recreation Department**  
Approved, retroactively, the submission of a federal grant application to the U.S. Fish and Wildlife Service in the amount of \$500,000 for the purchase of land by the Southern Oregon Land Conservancy for habitat conservation.
48. **Parks and Recreation Department**  
Increased the Other Funds expenditure limitation established for the Parks and Recreation Department by section 1(3), chapter 303, Oregon Laws 2015, Park development, by \$615,500 for the expenditure of two grants awarded the agency by the Marine Board.
49. **Parks and Recreation Department**  
Increased the Federal Funds expenditure limitation established for the Parks and Recreation Department by section 4(3), chapter 303, Oregon Laws 2015, Community support and grants, by \$29,214 to correct an error in the allocation of Federal Funds expenditure limitation in prior legislation.
51. **Department of Agriculture**  
Approved, retroactively, the submission of a federal grant application by the Department of Agriculture to the U.S. Food and Drug Administration in the amount of \$700,000 for designing a program to enhance produce safety to prepare for implementation of new FDA food safety rules.
52. **Department of Transportation**  
Increased the Other Funds expenditure limitation established for the Department of Transportation by section 5(2), chapter 761, Oregon Laws 2015, Maintenance and emergency relief programs, by \$16,966,375 and by section 5(8), chapter 761, Oregon

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Laws 2015, Local government program, by \$10,732,666 for highway repair costs resulting from winter storm damage due to the 2015-16 winter season.

**53. Department of Transportation**

Approved, retroactively, the submission of a federal grant application to the U.S. Federal Transit Administration in the amount of \$75.7 million for improvements to Abernethy Bridge on I-205, I-84 at Ladd Canyon, and I-5 between the Kuebler Interchange and Delaney Road.

**54. Department of Transportation**

Approved, retroactively, the submission of a federal grant application to the U.S. Federal Transit Administration in the amount of \$8,524,250 for vehicle replacements in rural transit districts, construction of bike lockers and electric vehicle charging stations at the Salem Baggage Depot, and a maintenance facility addition to a transit center in The Dalles.

**55. Department of Transportation**

Approved, retroactively, the submission of a federal grant application to the U.S. Federal Railroad Administration in the amount of \$750,000 to implement the use of Positive Train Control technology.

**56. Department of Transportation**

Approved, retroactively, the submission of a federal grant application to the U.S. Federal Highway Administration in the amount of \$75,000 to develop a manual for standardized railroad best practices.

**57. Department of Transportation**

Approved, retroactively, the submission of a federal grant application to the U.S. Federal Highway Administration in the amount of \$350,000 to develop a system to store underground utility location data, acquire technology that identifies the location and important attributes of utilities, and make revisions to the Utility Conflict Matrix.

**58. Department of Transportation**

Approved, retroactively, the submission of a federal grant application to the U.S. Federal Highway Administration in the amount of \$150,000 to acquire equipment used in non-destructive testing of concrete bridge decks and tunnel liners.

**59. Department of Consumer and Business Services**

Increased the Other Funds expenditure limitation established for the Department of Consumer and Business Services by section 3, chapter 592, Oregon Laws 2015 by \$558,617 to reverse a reduction in Other Funds expenditure limitation that was erroneously taken by prior legislation, and acknowledged receipt of a report on the operation of the Oregon Health Insurance Marketplace.

**60. Office of the Governor**

Acknowledged receipt of a report on the Office of the Governor organizational structure and Key Performance Measures.

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61. **Department of Administrative Services**  
Increased the Other Funds expenditure limitation established for the Department of Administrative Services by section 2(4), chapter 654, Oregon Laws 2015, Chief Human Resource Office, by \$6,520,731; authorized the establishment of 22 limited duration positions (9.17 FTE) and the extension of six existing limited duration positions through the end of the biennium (4.29 FTE), including the reclassification of one to a Principal Executive Manager (PEM) G; adjusted state agency budgets by allocating \$4,292,256 from the special purpose appropriation made to the Emergency Board by section 52, chapter 837, Oregon Laws 2015; increased Lottery Funds expenditure limitations by \$95,628; increased Other Funds expenditure limitations by \$3,357,479; and increased Federal Funds expenditure limitations by \$1,489,374; to adjust state agency budgets to fund assessment increases related to continuation of the Human Resources Information System project and staffing adjustments related to the previously approved DAS Information Technology reorganization per the attached table.
62. **Department of Administrative Services**  
Established a \$2,336,040 Other Funds Capital Construction expenditure limitation for the Department of Administrative Services to replace the roof at the Department of Environmental Quality and Public Health laboratory, and established a \$4,000,000 Other Funds Capital Construction expenditure limitation for the Department of Administrative Services for capital and tenant improvements at the 550 Building.
63. **Department of Administrative Services**  
Acknowledged receipt of a report on compensation plan changes and position allocations.
64. **Department of Administrative Services**  
Approved the 2017-19 uniform rent rates as proposed by the Department of Administrative Services and required under ORS 276.390.
65. **Department of Revenue**  
Deferred consideration of a funding request for the Property Valuation System information technology project, and directed the agency to report to the Emergency Board in September of 2016 on the status of the project.
66. **Department of Revenue**  
Increased the Other Funds expenditure limitation established for the Department of Revenue by section 2(1), chapter 596, Oregon Laws 2015, Administration, by \$379,481 and authorized the establishment of five permanent full-time positions (2.71 FTE) for the Recreational Marijuana Program.
68. **Department of Revenue**  
Acknowledged receipt of a report on the availability of data for tax research and forecasting purposes, and directed the agency to report to the Emergency Board in September of 2016 with an updated status report.

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## #61 DAS - Attachment A

Agency Name	Chapter	Section	Total Assessment				Total
			GF	LF	OF	FF	
DEPT OF HUMAN SERVICES	760	03-01	-	-	-	838,975	838,975
DEPT OF HUMAN SERVICES	760	01-01	986,879	-	-	-	986,879
DEPT OF ADMIN SERVICES	654	02-09	-	-	3,507	-	3,507
DEPT OF ADMIN SERVICES	654	02-08	-	-	3,855	-	3,855
DEPT OF ADMIN SERVICES	654	02-01	-	-	4,570	-	4,570
DEPT OF ADMIN SERVICES	654	02-04	-	-	4,989	-	4,989
DEPT OF ADMIN SERVICES	654	02-03	-	-	5,898	-	5,898
DEPT OF ADMIN SERVICES	654	02-02	-	-	7,101	-	7,101
DEPT OF ADMIN SERVICES	654	02-05	-	-	21,955	-	21,955
DEPT OF ADMIN SERVICES	654	02-07	-	-	61,033	-	61,033
DEPT OF ADMIN SERVICES	654	02-06	-	-	78,607	-	78,607
COUNSELORS AND THERAPISTS BRD	331	01	-	-	855	-	855
AVIATION DEPARTMENT	329	01-01	-	-	3,051	-	3,051
LONG TERM CARE OMBUDSMAN	408	01-02	113	-	-	-	113
LONG TERM CARE OMBUDSMAN	408	01-01	3,004	-	-	-	3,004
LONG TERM CARE OMBUDSMAN	408	02	-	-	436	-	436
EMPLOYMENT RELATIONS BOARD	406	01	2,129	-	-	-	2,129
EMPLOYMENT RELATIONS BOARD	406	03	-	-	1,043	-	1,043
TAX PRACTITIONERS BOARD	336	01	-	-	976	-	976
STATE BOARD OF ACCOUNTANCY	302	01	-	-	1,953	-	1,953
OFFICE OF THE GOVERNOR	810	01	10,417	-	-	-	10,417
OFFICE OF THE GOVERNOR	810	03	-	2,052	-	-	2,052
OFFICE OF THE GOVERNOR	810	04	-	-	1,323	-	1,323
PSYCHOLOGISTS EXAMINERS BOARC	334	01	-	-	855	-	855
BUSINESS DEVELOPMENT	694	02-02	-	-	7,644	-	7,644
BUSINESS DEVELOPMENT	694	01-01	1,672	-	-	-	1,672
BUSINESS DEVELOPMENT	694	03-06	-	956	-	-	956
BUSINESS DEVELOPMENT	694	03-02	-	7,883	-	-	7,883
BUSINESS DEVELOPMENT	694	03-01	-	8,897	-	-	8,897
BUSINESS DEVELOPMENT	694	02-01	-	-	4,180	-	4,180
BUSINESS DEVELOPMENT	694	02-04	-	-	956	-	956
LICENSED SOCIAL WORKERS BOARD	376	01	-	-	1,465	-	1,465
ADVOCACY COMMISSIONS OFFICE	375	01	488	-	-	-	488
DEPT OF JUSTICE	692	03-01	-	-	-	1,457	1,457
DEPT OF JUSTICE	692	03-02	-	-	-	2,020	2,020
DEPT OF JUSTICE	692	03-03	-	-	-	1,666	1,666
DEPT OF JUSTICE	692	03-04	-	-	-	76,272	76,272
DEPT OF JUSTICE	692	01-02	246	-	-	-	246
DEPT OF JUSTICE	692	01-04	891	-	-	-	891
DEPT OF JUSTICE	692	01-03	6,374	-	-	-	6,374
DEPT OF JUSTICE	692	01-06	21,310	-	-	-	21,310
DEPT OF JUSTICE	692	02-05	-	-	6,070	-	6,070
DEPT OF JUSTICE	692	02-04	-	-	8,561	-	8,561
DEPT OF JUSTICE	692	02-02	-	-	10,218	-	10,218
DEPT OF JUSTICE	692	02-08	-	-	23,273	-	23,273
DEPT OF JUSTICE	692	02-06	-	-	29,219	-	29,219
DEPT OF JUSTICE	692	02-07	-	-	34,611	-	34,611
DEPT OF JUSTICE	692	02-03	-	-	38,512	-	38,512
DEPT OF JUSTICE	692	02-01	-	-	48,121	-	48,121
DEPARTMENT OF STATE LANDS	335	01-01	-	-	25,873	-	25,873
LEGISLATIVE COUNSEL COMMITTEE	772	08	11,129	-	-	-	11,129
LEGISLATIVE REVENUE OFFICE	772	12	1,953	-	-	-	1,953
LEGISLATIVE FISCAL OFFICER	772	11-01	5,125	-	-	-	5,125
DEPT OF REVENUE	596	01-01	196,270	-	-	-	196,270
DEPT OF REVENUE	596	02-01	-	-	53,786	-	53,786
LEGISLATIVE ASSEMBLY	772	04	61,330	-	-	-	61,330
LEGISLATIVE ADMIN COMMITTEE	772	01-01	24,566	-	-	-	24,566
SECRETARY OF STATE	688	03	-	-	-	606	606
SECRETARY OF STATE	688	01-01	1,228	-	-	-	1,228

## #61 DAS - Attachment A

Agency Name	Chapter	Section	GF	LF	OF	FF	Total
SECRETARY OF STATE	688	01-02	11,079	-	-	-	11,079
SECRETARY OF STATE	688	02-04	-	-	3,767	-	3,767
SECRETARY OF STATE	688	02-01	-	-	7,211	-	7,211
SECRETARY OF STATE	688	02-05	-	-	7,636	-	7,636
SECRETARY OF STATE	688	02-03	-	-	17,437	-	17,437
OREGON STATE TREASURY	689	01-02	-	-	171	-	171
OREGON STATE TREASURY	689	01-01	-	-	21,769	-	21,769
JUDICIAL FIT OR DISABILITY COM	93	01-01	123	-	-	-	123
DISTRICT ATTORNEYS/DEPUTIES	332	01	8,787	-	-	-	8,787
JUDICIAL DEPARTMENT	691	01-02	430,457	-	-	-	430,457
GOVERNMENT ETHICS COMMISSION	465	01-01	-	-	1,924	-	1,924
CRIMINAL JUSTICE COMMISSION	606	03	-	-	-	23	23
CRIMINAL JUSTICE COMMISSION	606	01	1,995	-	-	-	1,995
CRIMINAL JUSTICE COMMISSION	606	02-00	-	-	27	-	27
DEPT OF MILITARY	594	03-01	-	-	-	40,057	40,057
DEPT OF MILITARY	594	03-02	-	-	-	1,878	1,878
DEPT OF MILITARY	594	03-03	-	-	-	9,518	9,518
DEPT OF MILITARY	594	01-04	2	-	-	-	2
DEPT OF MILITARY	594	01-03	1,969	-	-	-	1,969
DEPT OF MILITARY	594	01-01	9,999	-	-	-	9,999
DEPT OF MILITARY	594	01-02	11,713	-	-	-	11,713
DEPT OF MILITARY	594	02-01	-	-	933	-	933
DEPT OF MILITARY	594	02-02	-	-	5,292	-	5,292
DEPT OF MILITARY	594	02-04	-	-	6,653	-	6,653
DEPT OF MILITARY	594	02-03	-	-	28,657	-	28,657
MARINE BOARD	601	01-01	-	-	9,642	-	9,642
BOARD OF PAROLE/POST PRISON	304	01	3,825	-	-	-	3,825
OREGON STATE POLICE	696	03-02	-	-	-	821	821
OREGON STATE POLICE	696	03-04	-	-	-	183	183
OREGON STATE POLICE	696	01-02	1,968	-	-	-	1,968
OREGON STATE POLICE	696	01-03	16,107	-	-	-	16,107
OREGON STATE POLICE	696	01-04	32,324	-	-	-	32,324
OREGON STATE POLICE	696	01-01	162,181	-	-	-	162,181
OREGON STATE POLICE	696	04-00	-	7,935	-	-	7,935
OREGON STATE POLICE	696	02-03	-	-	171	-	171
OREGON STATE POLICE	696	02-01	-	-	21,845	-	21,845
OREGON STATE POLICE	696	02-02	-	-	27,833	-	27,833
OREGON STATE POLICE	696	02-04	-	-	33,030	-	33,030
PUBLIC SAFETY/STDS/TRAINING	658	02-01	-	-	32,477	-	32,477
DEPT OF VETERANS AFFAIRS	616	01-01	5,189	-	-	-	5,189
DEPT OF VETERANS AFFAIRS	616	03	-	-	14,629	-	14,629
DEPT OF CORRECTIONS	655	01-02	1,084,608	-	-	-	1,084,608
DEPARTMENT OF ENERGY	656	01	-	-	27,830	-	27,830
DEPT OF ENVIRONMENTAL QUALITY	593	02-04	-	-	172,399	-	172,399
PSYCHIATRIC REVIEW BOARD	411	01	2,685	-	-	-	2,685
PUBLIC DEFENSE SERVICES	615	01-03	6,104	-	-	-	6,104
PUBLIC DEFENSE SERVICES	615	01-01	12,395	-	-	-	12,395
OREGON YOUTH AUTHORITY	617	03	-	-	-	7,684	7,684
OREGON YOUTH AUTHORITY	617	01-01	234,585	-	-	-	234,585
INDIAN SERVICES COMMISSION	772	13	488	-	-	-	488
DEPT OF CONSUMER/BSN SERVICES	592	02	-	-	-	1,826	1,826
DEPT OF CONSUMER/BSN SERVICES	592	01	-	-	222,548	-	222,548
OREGON HEALTH AUTHORITY	838	04-01	-	-	-	191	191
OREGON HEALTH AUTHORITY	838	04-02	-	-	-	324,234	324,234
OREGON HEALTH AUTHORITY	838	01-01	2	-	-	-	2
OREGON HEALTH AUTHORITY	838	01-02	582,422	-	-	-	582,422
OREGON HEALTH AUTHORITY	838	02-01	-	-	31	-	31
OREGON HEALTH AUTHORITY	838	02-02	-	-	107,079	-	107,079
PUB EMPLOYEES RETIREMNT SYSTEI	595	01-01	-	-	89,634	-	89,634
DEPT OF EMPLOYMENT	485	04	-	-	-	149,532	149,532



## #61 DAS - Attachment A

Agency Name	Chapter	Section	GF	LF	OF	FF	Total
DEPT OF EMPLOYMENT	485	01-02	-	-	30,433	-	30,433
DEPT OF EMPLOYMENT	485	01-01	-	-	134,172	-	134,172
OREGON EDUCATION INVESTMENT B	686	01	3,661	-	-	-	3,661
HIGHER EDUCATION COORD. COMM.	642	06-01	-	-	-	89	89
HIGHER EDUCATION COORD. COMM.	642	06-02	-	-	-	9,486	9,486
HIGHER EDUCATION COORD. COMM.	642	01-09	408	-	-	-	408
HIGHER EDUCATION COORD. COMM.	642	01-03	1,249	-	-	-	1,249
HIGHER EDUCATION COORD. COMM.	642	01-01	3,549	-	-	-	3,549
HIGHER EDUCATION COORD. COMM.	642	01-02	6,651	-	-	-	6,651
HIGHER EDUCATION COORD. COMM.	642	05-01	-	-	562	-	562
HIGHER EDUCATION COORD. COMM.	642	05-02	-	-	1,653	-	1,653
HIGHER EDUCATION COORD. COMM.	642	05-03	-	-	1,986	-	1,986
OREGON STATE LIBRARY	407	01	1,799	-	-	-	1,799
OREGON STATE LIBRARY	407	03	-	-	2,992	-	2,992
DEPT OF EDUCATION	759	05-01	-	-	-	52	52
DEPT OF EDUCATION	759	01-01	109,408	-	-	-	109,408
DEPT OF EDUCATION	759	04-01	-	-	7,704	-	7,704
TEACHER STANDARDS/PRACTICES	602	01	-	-	4,882	-	4,882
COMMISSION FOR THE BLIND	484	03	-	-	-	9,868	9,868
COMMISSION FOR THE BLIND	484	01	1,776	-	-	-	1,776
COMMISSION FOR THE BLIND	484	02	-	-	8	-	8
DEPT OF AGRICULTURE	683	01-04	3,770	-	-	-	3,770
DEPT OF AGRICULTURE	683	01-03	4,033	-	-	-	4,033
DEPT OF AGRICULTURE	683	01-02	8,766	-	-	-	8,766
DEPT OF AGRICULTURE	683	03	-	6,373	-	-	6,373
DEPT OF AGRICULTURE	683	02-01	-	-	446	-	446
DEPT OF AGRICULTURE	683	02-04	-	-	18,164	-	18,164
DEPT OF AGRICULTURE	683	02-03	-	-	21,090	-	21,090
DEPT OF AGRICULTURE	683	02-02	-	-	23,070	-	23,070
DEPT OF FORESTRY	809	04-01	-	-	-	334	334
DEPT OF FORESTRY	809	04-02	-	-	-	1,365	1,365
DEPT OF FORESTRY	809	04-04	-	-	-	740	740
DEPT OF FORESTRY	809	01-02	2,830	-	-	-	2,830
DEPT OF FORESTRY	809	01-01	5,731	-	-	-	5,731
DEPT OF FORESTRY	809	02-04	-	-	1,861	-	1,861
DEPT OF FORESTRY	809	02-07	-	-	2,115	-	2,115
DEPT OF FORESTRY	809	02-02	-	-	13,978	-	13,978
DEPT OF FORESTRY	809	02-03	-	-	15,087	-	15,087
DEPT OF FORESTRY	809	02-01	-	-	168,728	-	168,728
DEPT OF GEOLOGY AND INDUSTRIES	657	03	-	-	-	521	521
DEPT OF GEOLOGY AND INDUSTRIES	657	01	5,465	-	-	-	5,465
DEPT OF GEOLOGY AND INDUSTRIES	657	02-01	-	-	6,022	-	6,022
DEPT OF PARKS AND RECREATION	303	02-02	-	53,723	-	-	53,723
DEPT OF PARKS AND RECREATION	303	01-02	-	-	90,809	-	90,809
DEPT OF FISH AND WILDLIFE	690	01-03	115,475	-	-	-	115,475
DEPT OF FISH AND WILDLIFE	690	02-03	-	-	192,652	-	192,652
DEPT OF LAND CONSERVTN/DEVELOI	333	03	-	-	-	4,362	4,362
DEPT OF LAND CONSERVTN/DEVELOI	333	01-01	9,809	-	-	-	9,809
LAND USE APPEALS BOARD	193	01	1,404	-	-	-	1,404
DEPT OF WATER RESOURCES	597	01	34,473	-	-	-	34,473
DEPT OF WATER RESOURCES	597	03-01	-	-	3,310	-	3,310
WATERSHED ENHANCEMENT BOARD	659	05	-	7,809	-	-	7,809
OREGON DEPT OF TRANSPORTATION	761	05-11	-	-	302	-	302
OREGON DEPT OF TRANSPORTATION	761	05-09	-	-	16,479	-	16,479
OREGON DEPT OF TRANSPORTATION	761	05-07	-	-	35,915	-	35,915
OREGON DEPT OF TRANSPORTATION	761	05-02	-	-	318,593	-	318,593
OREGON DEPT OF TRANSPORTATION	761	05-16	-	-	719,247	-	719,247
CHIROPRACTIC EXAMINERS BOARD	330	01	-	-	1,191	-	1,191
HEALTH RELATED LICENSING BRDS	192	03	-	-	390	-	390
HEALTH RELATED LICENSING BRDS	192	05	-	-	598	-	598

## #61 DAS - Attachment A

Agency Name	Chapter	Section	GF	LF	OF	FF	Total
HEALTH RELATED LICENSING BRDS	192	02	-	-	639	-	639
HEALTH RELATED LICENSING BRDS	192	04	-	-	658	-	658
HEALTH RELATED LICENSING BRDS	192	06	-	-	660	-	660
HEALTH RELATED LICENSING BRDS	192	01	-	-	1,256	-	1,256
OREGON BOARD OF DENTISTRY	191	01	-	-	1,707	-	1,707
BUREAU OF LABOR AND INDUSTRIES	693	04	-	-	-	1,558	1,558
BUREAU OF LABOR AND INDUSTRIES	693	01	15,723	-	-	-	15,723
BUREAU OF LABOR AND INDUSTRIES	693	02	-	-	6,761	-	6,761
LIQUOR CONTROL COMMISSION	817	07-00	-	-	5,102	-	5,102
LIQUOR CONTROL COMMISSION	600	01-01	-	-	50,457	-	50,457
MEDICAL EXAMINERS BOARD	409	01	-	-	9,469	-	9,469
BOARD OF NURSING	439	01	-	-	11,667	-	11,667
PHARMACY, OREGON BOARD OF	410	01	-	-	4,638	-	4,638
PUBLIC UTILITY COMMISSION	305	01-01	-	-	14	-	14
PUBLIC UTILITY COMMISSION	305	01-02	-	-	17	-	17
PUBLIC UTILITY COMMISSION	305	01-04	-	-	25	-	25
PUBLIC UTILITY COMMISSION	305	01-03	-	-	31,246	-	31,246
RACING COMMISSION	306	01-00	-	-	3,239	-	3,239
DEPT OF HOUSING/COMMUNITY SVCS	747	04	-	-	-	4,056	4,056
DEPT OF HOUSING/COMMUNITY SVCS	747	01	145	-	-	-	145
DEPT OF HOUSING/COMMUNITY SVCS	747	02	-	-	14,736	-	14,736
CONSTRUCTION CONTRACTOR BOAR	190	01	-	-	18,306	-	18,306
REAL ESTATE AGENCY	94	01	-	-	7,322	-	7,322
			4,292,256	95,628	3,357,479	1,489,374	9,234,737



# Budget Narrative

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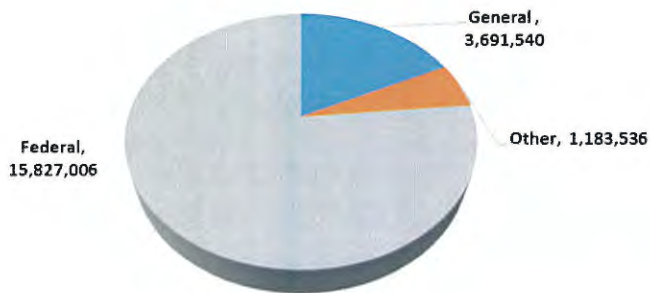
## AGENCY SUMMARY

# Budget Narrative

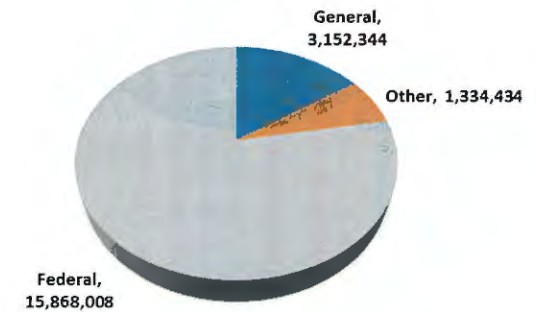
## Budget Summary Graphics

As shown in the following graphs, federal grants are the primary source of funding for Oregon Commission for the Blind (OCB). General Fund and Other Funds provide the match required under various federal programs.

2015-17 Legislatively Adopted Budget  
by Fund Type



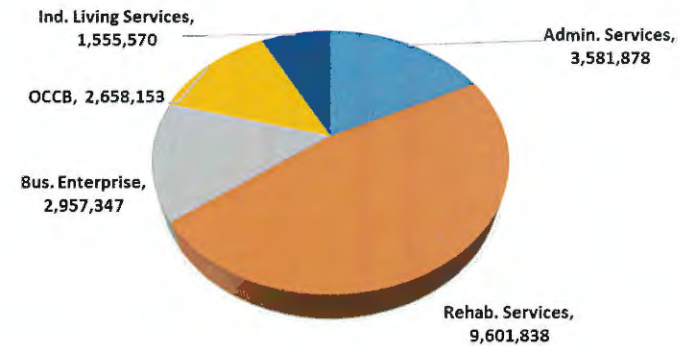
2017-19 Governor's Budget  
by Fund Type



2015-17 Legislatively Adopted  
Budget by Program



2017-19 Governor's Budget  
by Program



# Budget Narrative

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## Mission Statement & Statutory Authority

The Oregon Commission for the Blind was established in 1937 as a state agency and has evolved over time to be a consumer driven organization with a citizen governing body appointed by the Governor. Today, the agency receives policy direction and oversight from a seven-member Commission representing consumer organizations, education, ophthalmology/optometry, business and individual citizens. It is required that the majority of the seven members of the Commission are persons who experience blindness. These leaders of the organization have charged the agency with the important task of becoming an exemplary service provision entity within state government.

The agency operates under ORS 346.110 through 346.570 and through the Workforce Innovation and Opportunity Act of 2014, which designated the US Department of Education, Rehabilitation Services Administration as the principal federal agency to oversee the national vocational rehabilitation system throughout the nation, in collaboration with the US Department of Labor and other workforce entities. Additional authority for agency operations is included in Chapter 585 of the Oregon Administrative Rules.

The mission of the Commission for the Blind is to Empower Oregonians who are blind to fully engage in life.

The agency core values include the following:

- **Customer service** - Dedication to meet the needs of our clients and customers and honoring our commitments.
- **Leadership** - Being open, authentic and lifting others up while building consensus towards a common goal.

## Budget Narrative

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- **Integrity** – Meet Commitments, act responsibly with public and personal trust and be accountable for words and actions.
- **Professionalism** – Commitment to quality, pride in your work.
- **Operational Excellence** – Strive for the highest quality and continuous improvement.
- **Innovation** – Developing creative solutions and putting them into action.
- **Collaboration** – The ability to facilitate, negotiate, build consensus, build strong teams and empower others.

We are committed to ensuring that people have access to options/opportunities and are equipped with the tools and resources they need in order to make meaningful choices for their lives.

### We Serve

**Oregonians who are legally blind** who require rehabilitation services in order to be employed. Legal blindness is vision less than 20/200 or with less than a 20-degree field of vision with best correction.

**Oregonians who experience vision loss** who require training and tools to live independently in their community.

**Businesses in Oregon** who have, or are considering hiring, employees who are blind.

## Budget Narrative

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### We Provide

**A continuum of services** from youth transition to services for older Oregonians who experience vision loss.  
ORS 346.110

**Employment counseling**, training and job placement, individual and group counseling addressing adjustment to blindness.  
ORS 346.180

**Technology Services**, adaptive equipment and software customized to meet needs of individuals and employer work sites.  
ORS.346.180

**Resources for businesses** in need of technical assistance and support in hiring or retaining employees who experience vision loss and for Oregonians seeking information and referral regarding resources for vision loss.  
ORS 346.180

**Training** that enables Oregonians who experience vision loss to remain independent in their homes and communities, and training in adaptive skills which increase work readiness.  
ORS 346.250

**Public education** on the abilities of Oregonians who are blind or visually impaired.  
ORS 346.170

**Employment opportunities** in public buildings and on public property via the Business Enterprise program. ORS 346.520

**A registry** of Oregonians who are legally blind. ORS 346.160

## Budget Narrative

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The Commission for the Blind has five major program objectives in service to our mission:

1. Helping Oregonians who are blind get and keep jobs that allow them to support themselves and their families;
2. Training Oregonians in the alternative skills related to blindness such as adaptive technology, white cane travel, braille and activities of daily living;
3. Helping seniors and individuals with vision loss (who are unable to work) live with the highest levels of independence and self-sufficiency so that they can remain independent in their homes and active in their communities;
4. Licensing and supporting business owners who operate food service and vending operations in public buildings and facilities throughout the state;
5. Executing business functions and providing administrative support for agency programs that ensure effective and efficient use of resources delivering high quality services and outcomes.

# Budget Narrative

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## Agency Two-Year Strategic Plans

The agency has a team of 52 full time equivalent (FTE) specialized rehabilitation and administrative staff that work toward achieving the following key goals related to the business of the agency:

- **Exemplary Service** – Our direct services to our clients and the business functions that support those services meet and exceed the expectations of stakeholders.
- **Engaged Staff** – The direct service delivery framework of the organization requires staff with specialized skills that are fully committed to high quality services and outcomes.
- **Financially Strong** – Stable funding is essential for maintaining the adequate level of infrastructure to plan for and execute programs and services statewide.
- **Effective Community Education and Outreach** – As a small state agency, it is essential that we maintain regular communication/outreach activities in communities throughout Oregon. This is the only way we are able to increase community awareness about the capabilities of Oregonians who are blind and ensure that people know about the services available through the agency.
- **Measurable Results** – The agency has developed a business intelligence strategy that allows us to understand in real time how we are doing in meeting the needs of our customers and delivering outcomes for Oregonians who are blind.



## Budget Narrative

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The agency key goals align with the Governor's Plan for Oregon in the following areas:

### ***A Seamless System of Education and Workforce Training***

As transition-aged youth who are blind prepare to exit high school, our Transition Specialists work with the student, their families and education planning team to develop a seamless transition into further post-secondary training and/or employment. Oregonians who are blind work with the Commission for the Blind's specialized vocational rehabilitation counseling and teaching professionals to build and implement individualized plans for employment consistent with their unique strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice.

### ***A Thriving Statewide Economy for all Oregonians***

Vocational rehabilitation at the Commission for the Blind is about helping individuals who are blind and want to gain or retain employment to acquire the necessary adaptive skills for full participation in the workforce. In order for Oregonians who are blind to fully participate in the economic recovery, they need access to training, technology and other related vocational rehabilitation services. It is also critical that there be employers who want to hire qualified individuals with disabilities in order to enhance and diversify their workforce. We are committed to being an agency that leads by example and have many employees who are blind who are working at all levels of the organization.

### ***Healthy, Safe Oregonians***

Oregonians who are blind that can be actively engaged in their community and enjoy participation in hobbies, recreation, civic engagement, or whatever their interests take them. Seniors who lose their vision and desire to remain living in their own homes can learn to be safe and independent in their daily lives through specialized adaptive training designed for their own environment and life. This training is provided via the agency's specialized rehabilitation staff.

# Budget Narrative

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## ***Excellence in State Government***

The agencies business intelligence strategy utilizes outcome based management that emphasizes accountability and transparency throughout the organization. We focus on measuring results that tell the agency that we are meeting the needs of our customers, delivering results, and focusing on the priorities established by the Governor and the Commission.

## **Strategic Priorities**

In order to be a future-ready agency that can prepare for changes in the needs of our clients and demands on resources, the Commission for the Blind has developed four strategic priorities as a means to organize our work:

### ***Strategic Priority- Investment in efficient and effective statewide services***

State Investment - Support of programs that aligns with the priorities of government and a funding level that meets the needs of Oregonians who are blind.

Federal Investment - The agency leverages the maximum available federal dollars available to Oregon to address the employment and independent living needs of Oregonians who are blind.

Other Fund Investment - Targeted and strategic opportunities for community partner collaborations and donated funds to engage in innovation and expansion activities.

## Budget Narrative

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### **Outcome measures aligned with priority**

The agency operates under a performance management system that connects our strategic priorities to outcomes. The following are the outcome measures developed and tracked that are connected with this strategic priority: Number of clients served, Community donations, Spending to budget, Meeting federal match.

### ***Strategic Priority - Client Independence***

Financial Independence – Oregonians who are blind are able to get and keep jobs at living wages so that they can experience prosperity along with other citizens of the state.

Home/Community Independence – Oregonians with vision loss have access to the critical training in adaptive skills related to blindness in order for them to lead full and productive lives.

Technology Independence – Technology advances have allowed individuals who are blind to engage in numerous activities independently utilizing the right technology devices and training on how to be proficient at using those devices.

### **Outcome measures aligned with priority**

The agency operates under a performance management system that connects our strategic priorities to outcomes. The following are the outcome measures developed and tracked that are connected with this strategic priority:

Client employment, Client independence, BE client performance, Client referrals, Number of clients served, Americans with Disabilities Act (ADA) compliance, Client satisfaction, Engaged staff.

## Budget Narrative

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### ***Strategic Priority - Timely Service Delivery***

Independent Living Services – Seniors can obtain independent living skills assessment and training within a timely manner statewide.

Vocational Rehabilitation Services – Oregonians who are blind who seek assistance from the agency to get and keep jobs receive timely eligibility determinations and services they need in order to reach their goals.

Technology Services – Oregonians who are blind have access to technology tools and training for getting and keeping jobs and living independently. Work sites are optimized through adaptive technology.

Timely Life Goal Attainment – Oregonians who are blind can get the services they need when they need them in order to reach maximum independence.

Timely Job Attainment – Oregonians who are blind are able to find jobs that match their unique skills and abilities and fully engage in the labor market. Businesses are seeking and hiring qualified individuals who are blind as a means of diversifying their work force.

### **Outcome measures aligned with priority**

The agency operates under a performance management system that connects our strategic priorities to outcomes. The following are the outcome measures developed and tracked that are connected with this strategic priority: Client employment, Client independence, BE client performance, Timely service delivery, Client referrals, Number of clients served, Client satisfaction, Engaged staff.

## Budget Narrative

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### ***Strategic Priority – Innovative Pre-Employment Transition Services***

Ensuring that in-school youth who are blind have access to services that include job exploration counseling, work based learning experiences, counseling on opportunities for enrollment in post-secondary educational and training programs, workplace readiness training and instruction in self advocacy and peer mentoring.

Providing a seamless transition from high school to higher education or training or employment for students who are blind. Utilizing evidence-based strategies to engage our youth in services and activities that will lead to higher levels of employment and independence after high school.

### **Outcome measures aligned with priority**

The agency operates under a performance management system that connects our strategic priorities to outcomes. The following are the outcome measures developed and tracked that are connected with this strategic priority: Client employment, Client independence, Client referrals, Number of clients served, Americans with Disabilities Act (ADA) compliance, Client satisfaction, Engaged staff.

### **Delivering Outcomes**

The Commission for the Blind's ability to deliver results on these strategic priorities will require the following:

- The ability to recruit and retain specialized staff trained in the field of blindness rehabilitation that have a strong commitment and passion for serving Oregonians who are blind.
- Staffing capacity at a level necessary to be responsive to individuals at the time they receive the diagnosis of blindness so that they understand their options for learning skills and resuming full independence.

## Budget Narrative

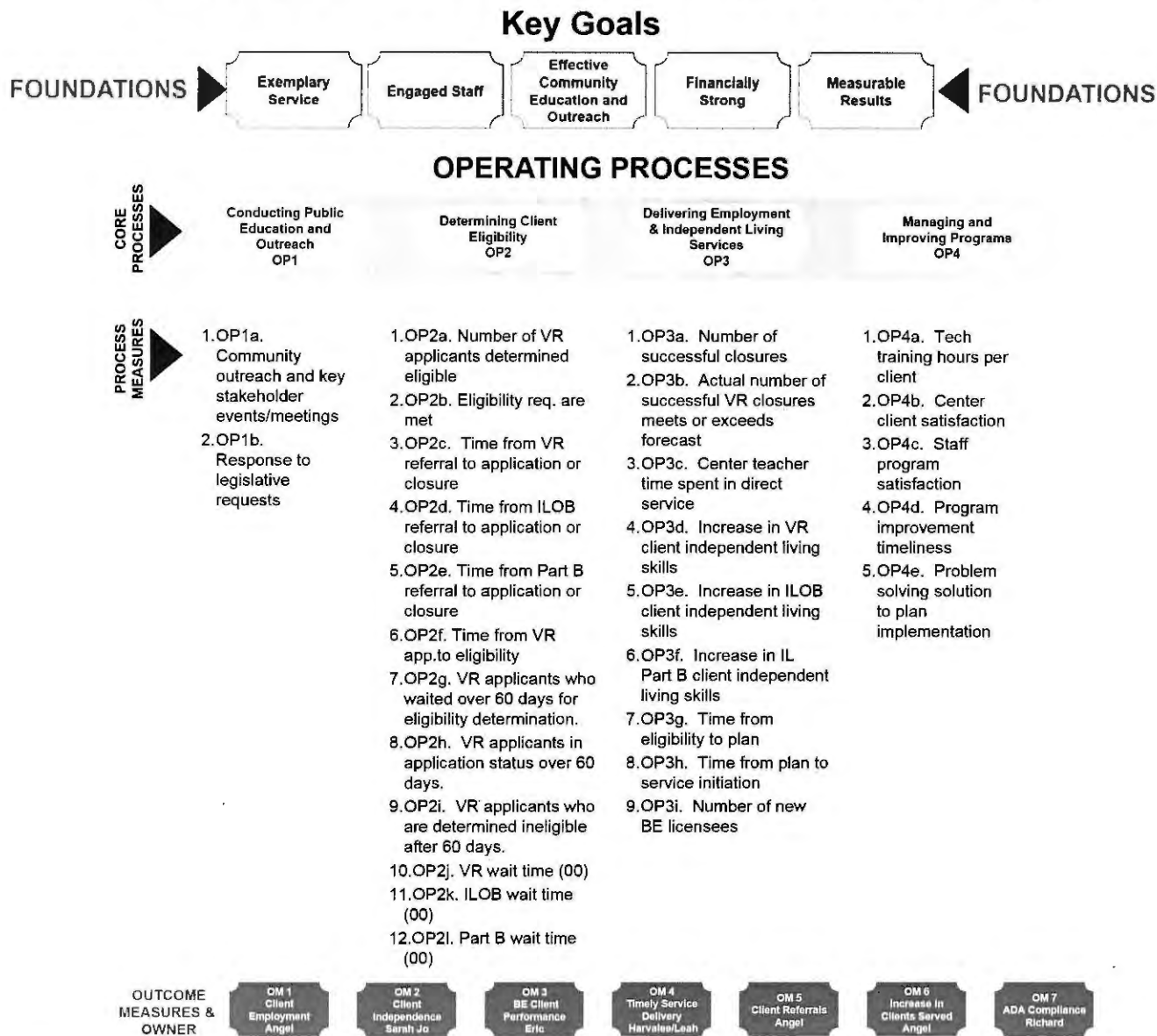
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- Leveraging the full amount of federal dollars available to Oregon. Strategic enhancements of agency services over time to build capacity and agency responsiveness to emerging needs.
- The ability to have specialized staff be available as a resource to health care providers who are working with individuals experiencing vision loss.
- The opportunity to partner and collaborate with the education system to provide for a seamless transition from school services to post-secondary training and employment for transition-aged youth.
- The capacity to actively engage in the workforce system to assist businesses in recruiting and retaining qualified workers who are blind.

The chart on the following two pages graphically presents our long-term and short-term strategic goals and objectives using a strategic framework called the Fundamentals Map. This map provides the agency a framework to understand the work that we do in direct service to our clients as well as the supporting work that is essential to ensure we are delivering services effectively and efficiently and in accordance with federal and state requirements.

# Budget Narrative

## AGENCY FUNDAMENTALS MAP SUMMARY (Part 1)

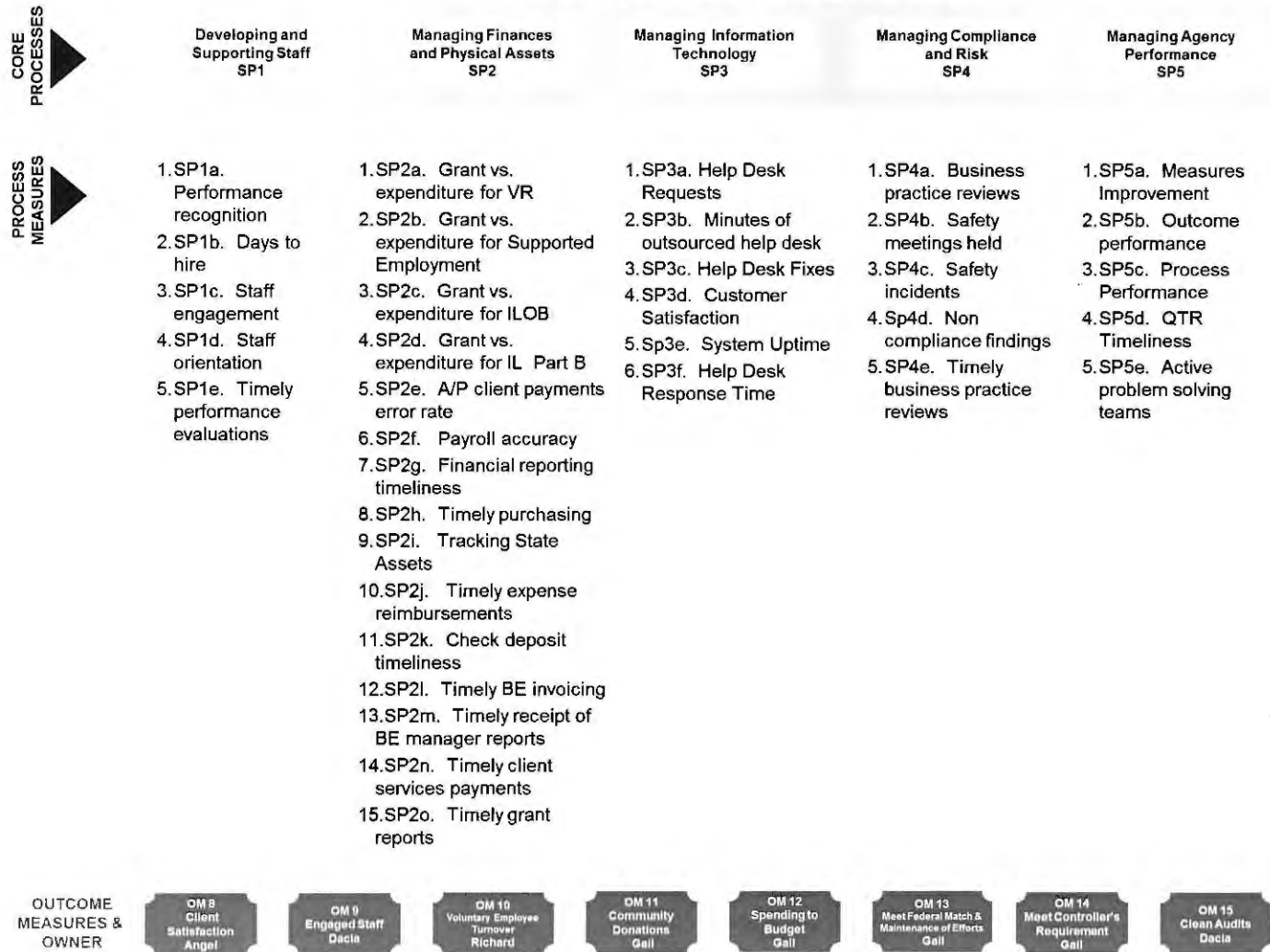




# Budget Narrative

## AGENCY FUNDAMENTALS MAP SUMMARY (Part 2)

### SUPPORTING PROCESSES



# Budget Narrative

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## Program Descriptions

The Commission for the Blind administers the following programs:

**Vocational Rehabilitation** – The Commission for the Blind is a specialized partner within the workforce system. We assist Oregonians who are blind to obtain and maintain employment. We also support businesses with hiring and training qualified job seekers and employees who are blind.

**Pre-Employment Transition Services** – Under the vocational rehabilitation program, the agency provides transition-aged youth with pre-vocational training and work experiences in order to support their long-term success in employment. The agency collaborates with partners within the education system to ensure a seamless transition from school to further education and employment.

**Pre-Vocational Independent Living Skills Training** – Individuals who are seeking employment and require training in areas such as white cane travel, braille, technology, meal preparation and techniques of daily living will be able to attend our Orientation and Career Center that will provide an individualized training curriculum that meets their specific needs in accordance with their career and vocational plans.

**Independent Living Services** – The Commission for the Blind provides specialized services to support individuals who are blind to live full and productive lives in their homes and communities. Our specialized teachers, in collaboration with medical and community partners, work with individuals to provide training that is adapted to address their specific needs and life situation.

**Business Enterprise Program** – The Commission for the Blind provides employment opportunities for individuals who are blind that are trained and licensed to operate food service/vending operations in public buildings and locations throughout Oregon.

# Budget Narrative

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## Criteria for the 2017-19 Budget Development

### Environmental Factors

Under Governor Brown's leadership, Oregon is working to build healthy, vibrant communities that offer opportunities for all Oregonians to reach their full potential. Opportunities for Oregonians who are blind means the same as it does for all citizens of Oregon: access to a seamless system of education and workforce training, the ability to participate in a thriving statewide economy with good-paying jobs and expanded choices for independence and being fully engaged in their homes and communities. Oregonians who are blind believe and expect that their opportunities should in no way be limited by their vision loss.

As the only statewide organization that provides specialized services to adults who experience vision loss, the Commission for the Blind recognizes its critical role in ensuring that Oregonians who are blind have access to the services and resources necessary in order for them to lead fully integrated and productive lives. As Oregon's population increases, more individuals with vision loss will require training and supports to get and keep work.

In addition, as Oregonians age, there is a growing demand for services required to maintain full independence in their homes and communities. Many Oregonians who are blind experience vision loss as adults and need to learn alternative skills in order to operate and live independently. After learning adaptive skills such as white cane travel, braille, adaptive technology, and adaptive techniques for everyday life activities, it is expected that individuals who are blind will go back to work and engage in other meaningful activities such as hobbies, recreation and civic engagement.

Governor Brown has prioritized investing in education and prevention services as a long-term investment that will produce greater outcomes and reduce the costs to the state. Vocational Rehabilitation has consistently demonstrated that there is a substantial return on investment. Individuals who are blind and successfully gain or retain employment pay back the cost of their rehabilitation by paying taxes and by investing their earnings into the economy as consumers. Seniors who are able to acquire skills needed to remain independent in their homes after experiencing vision loss can delay or avoid higher levels of assisted living and nursing care (that would otherwise be

## Budget Narrative

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paid for at the expense of taxpayers). Maximizing independence and self-reliance are deeply embedded in the core values of Oregonians. The Commission for the Blind assists those of us who are blind in personally applying those values and principles in everyday life.

Government is faced with making difficult decisions in regard to how best to invest the limited resources available to create lasting outcomes in our state. The increased demand for services is compounded by the limited resources which results in an increasing gap between the need for the agency's services and funding/access to those services.

The Commission for the Blind is facing critical challenges in the coming years that will only be able to be fully addressed through the utilization of available resources. These challenges include:

- Nearly all jobs require the ability to interface with technology to apply for and engage in the work. Individuals who are blind access this information through adaptive tools and training.
- Changes in the demographics of working-age adults who are blind now include more individuals with multiple conditions that result in complex barriers to employment.
- A rapidly-increasing aging population (who experience vision loss) who need training and support in order to remain independent in their homes and actively engaged in their communities.
- Society has become increasingly reliant upon technology for daily life activities. Available adaptive solutions for individuals who are blind require training and support to ensure that people are able to access and operate these technologies.

This budget requests the resources to address these challenges necessary to ensure that the agency generating outcomes to benefit the citizens of Oregon who are blind.

# Budget Narrative

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## Agency Initiatives & Accomplishments

### Two-year initiatives

- Implement changes as a result of the passage of the Workforce Innovation and Opportunity Act (WIOA).
- Engage as a full partner within the workforce system that provides specialized services to job seekers who are blind and business partners who hire job seekers who are blind.
- Maintain specialized staff who can respond to the unique needs of individuals who are blind.
- Oversee an upgrade to the agency's automated data/case management system to respond to the reporting requirements under the Workforce Innovation and Opportunity Act (WIOA).
- Track performance and drive improvements related to timely service delivery for Oregonians who are blind.
- Manage and monitor key performance targets related to measuring agency impact related to increasing client independence.
- Create infrastructure that supports Innovative Pre-Employment Transition Services as outlined under the Workforce Innovation and Opportunity Act (WIOA).

# Budget Narrative

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## Accomplishments

The Commission established timely service delivery as a strategic priority in 2014. Since that time, through implementation of outcome based management, the agency has focused resources in this area. This includes reducing the time from application to eligibility for clients in the vocational rehabilitation program from over 60 days to 20 days or less on average.

After receiving additional teaching resources in the Independent Living Program in 2015, the agency has been able to reduce the average wait time for clients to receive an initial appointment from 9 weeks to 2.5 weeks on average.

The agency has been focused on strengthening and improving the Business Enterprise program in recent years, including adding necessary staff to training and support licensed managers who are blind. As a result of our efforts the average annual income for licensed managers who are blind in the Business Enterprise Program increased from \$25,307 in 2011 to \$51,252 in 2015.

The agency has been focused on developing and sustaining strong business practices to support the important work with clients. As part of our efforts, we have developed internal grant management tracking systems that produce reports for program managers to be able to make real time financial decisions to drive optimal client services statewide.



# Budget Narrative

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## **Major Information Technology Projects/Initiatives**

Although the information technology project included in Policy Option Package 103 does not meet the criteria as major, the agency is working with our assigned Strategic Technology Officer with the Office of the Chief Information Officer (CIO) and the Department of Administrative Services Office of Procurement to facilitate the appropriate planning and staging of the project.

# Budget Narrative

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## Summary of 2017-19 Budget

The Agency worked in partnership with the Commission board to identify principles for the budget development process that focused on maximizing federal dollars available to the state to provide high-quality, timely vocational rehabilitation and independent living services to Oregonians who are blind. This budget was based on the agency strategic plan and the Governor's priorities for Oregon.

The Commission for the Blind is committed to meeting the vocational and independent living needs of Oregonians who are blind. Our programs are an investment in the citizens who experience vision loss in Oregon and have a high return on that investment. Clients in the Vocational Rehabilitation Program repay the service costs through paying taxes once they become employed. Clients in our Independent Living Program who are able to maintain their independence in their homes avoid or delay the need for institutionalized care that costs the state thousands of dollars each year. Our goals include maximizing available resources to serve as many Oregonians who experience vision loss as possible.

The Workforce Innovation and Opportunity Act (WIOA), represents the first major reform of the public workforce system in more than 15 years. Achieving WIOA's ambitious goals requires significant changes to workforce development programs, including improved collaboration across agencies, workforce boards, employers, and educational institutions, a greater focus on outcomes and efficiency, and better engagement with job seekers and employers. In order to make the necessary changes required under WIOA, the agency infrastructure has to expand to address all of the requirements under WIOA. The agency has developed Policy Option Package 101 to provide the necessary infrastructure to respond to the new challenges and requirements under WIOA.

The Commission for the Blind has implemented the use of shared/centralized human resources services through the Department of Administrative Services Chief Human Resources Office as a means to ensure effective and efficient business practices in the administration of human resources for the agency. In consultation with the agency Chief Human Resource Office HR Client Manager, the agency learned two of the agency positions that have been classified traditionally as temporary employees are more appropriately classified as seasonal employees based on

## Budget Narrative

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the type of work that occurs, the timing and frequency. Policy Option Package 102 requests a shift in resources from client special payments to personal services and adds two part-time seasonal positions, one seasonal FTE.

Policy Option Package 103 requests general fund in order to upgrade the agency automated case management system. The agency utilizes an automated case management system to capture federally required data reporting elements and to facilitate the case development and tracking of information of individuals who are participating in agency services in the areas of vocational rehabilitation, independent living and business enterprises. Our current case management system has been in operation for many years and due to the recent changes that resulted under the passage of the Workforce Innovation and Opportunity Act, the company that has been providing us with the software has determined that it will no longer be offering or maintaining the case management system product after December 2017.

As a result of this change, the agency will be required to convert to a new system. Although the scope of this project will not meet the threshold for a major IT Project, the agency is working with our assigned Strategic Technology Officer with the Office of the Chief Information Officer (CIO) and the Department of Administrative Services Office of Procurement to facilitate the appropriate planning and staging of the project.

**Performance Measures** – The Oregon Commission for the Blind has four key performance measures:

KPM #1 – Employment Rate – The percentage of Oregonians who are blind who enter into plans for employment who become employed.

KPM #2 – Independent Living – The percentage of Oregonians who are blind who self-assess as having an increase in confidence skills and abilities.

KPM #3 – Customer Service – Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.

## Budget Narrative

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KPM #4 – Commission Best Practices.

The Annual Performance Progress Report (APPR) is included in the Special Reports section.

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Blind Commission  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-000-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2015-17 Leg Adopted Budget	56	52.21	16,204,789	2,892,992	-	992,094	12,319,703	-	-
2015-17 Emergency Boards	-	-	4,497,327	798,548	-	191,445	3,507,334	-	-
<b>2015-17 Leg Approved Budget</b>	<b>56</b>	<b>52.21</b>	<b>20,702,116</b>	<b>3,691,540</b>	<b>-</b>	<b>1,183,539</b>	<b>15,827,037</b>	<b>-</b>	<b>-</b>
<b>2017-19 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	825,944	345,483	-	(7,483)	487,944	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
<b>Subtotal 2017-19 Base Budget</b>	<b>56</b>	<b>52.21</b>	<b>21,528,060</b>	<b>4,037,023</b>	<b>-</b>	<b>1,176,056</b>	<b>16,314,981</b>	<b>-</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(225,793)	(72,615)	-	2,362	(155,540)	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	62,225	31,256	-	(1,294)	32,263	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(163,568)</b>	<b>(41,359)</b>	<b>-</b>	<b>1,068</b>	<b>(123,277)</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(2,503,330)	(680,109)	-	(199,049)	(1,624,172)	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(2,503,330)</b>	<b>(680,109)</b>	<b>-</b>	<b>(199,049)</b>	<b>(1,624,172)</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	472,323	195,170	-	42,297	234,856	-	-
State Gov't & Services Charges Increase/(Decrease)			92,009	92,009	-	-	-	-	-

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**Summary of 2017-19 Biennium Budget**

Commission for the Blind  
Blind Commission  
2017-19 Biennium

Governor's Budget  
Cross Reference Number: 58500-000-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal</b>	-	-	564,332	287,179	-	42,297	234,856	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2017-19 Current Service Level</b>	<b>56</b>	<b>52.21</b>	<b>19,425,494</b>	<b>3,602,734</b>	<b>-</b>	<b>1,020,372</b>	<b>14,802,388</b>	<b>-</b>	<b>-</b>

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Blind Commission  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-000-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2017-19 Current Service Level</b>	<b>56</b>	<b>52.21</b>	<b>19,425,494</b>	<b>3,602,734</b>	<b>-</b>	<b>1,020,372</b>	<b>14,802,388</b>	<b>-</b>	<b>-</b>
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	(808,384)	-	-	-	(808,384)	-	-
<b>Modified 2017-19 Current Service Level</b>	<b>56</b>	<b>52.21</b>	<b>18,617,110</b>	<b>3,602,734</b>	<b>-</b>	<b>1,020,372</b>	<b>13,994,004</b>	<b>-</b>	<b>-</b>
080 - E-Boards									
080 - May 2016 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2016 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	(4)	(4.10)	(1,028,724)	(432,286)	-	-	(596,438)	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(97,558)	(17,570)	-	(17,305)	(62,683)	-	-
092 - Statewide AG Adjustment	-	-	(4,236)	(184)	-	(603)	(3,449)	-	-
101 - WIOA and Employment First	10	12.39	2,868,194	(350)	-	331,970	2,536,574	-	-
102 - SWEP Seasonal	2	1.00	-	-	-	-	-	-	-
103 - Case Management System Migration	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>8</b>	<b>9.29</b>	<b>1,737,676</b>	<b>(450,390)</b>	<b>-</b>	<b>314,062</b>	<b>1,874,004</b>	<b>-</b>	<b>-</b>
<b>Total 2017-19 Governor's Budget</b>	<b>64</b>	<b>61.50</b>	<b>20,354,786</b>	<b>3,152,344</b>	<b>-</b>	<b>1,334,434</b>	<b>15,868,008</b>	<b>-</b>	<b>-</b>
Percentage Change From 2015-17 Leg Approved Budget	14.29%	17.79%	-1.68%	-14.61%	-	12.75%	0.26%	-	-
Percentage Change From 2017-19 Current Service Level	14.29%	17.79%	4.78%	-12.50%	-	30.78%	7.20%	-	-



**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Administrative Services  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-001-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2015-17 Leg Adopted Budget	8	7.48	1,803,369	305,172	-	37,601	1,460,596	-	-
2015-17 Emergency Boards	-	-	55,362	13,804	-	(1,884)	43,442	-	-
<b>2015-17 Leg Approved Budget</b>	<b>8</b>	<b>7.48</b>	<b>1,858,731</b>	<b>318,976</b>	<b>-</b>	<b>35,717</b>	<b>1,504,038</b>	<b>-</b>	<b>-</b>
<b>2017-19 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	(2)	(1.48)	(153,126)	(30,916)	-	(461)	(121,749)	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
<b>Subtotal 2017-19 Base Budget</b>	<b>6</b>	<b>6.00</b>	<b>1,705,605</b>	<b>288,060</b>	<b>-</b>	<b>35,256</b>	<b>1,382,289</b>	<b>-</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(32,559)	(7,140)	-	-	(25,419)	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	(4,765)	(805)	-	(227)	(3,733)	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(37,324)</b>	<b>(7,945)</b>	<b>-</b>	<b>(227)</b>	<b>(29,152)</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	56,465	39,129	-	1,275	16,061	-	-
State Gov't & Services Charges Increase/(Decrease)			28,493	28,493	-	-	-	-	-

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Administrative Services  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-001-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal</b>	-	-	84,958	67,622	-	1,275	16,061	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2017-19 Current Service Level</b>	<b>6</b>	<b>6.00</b>	<b>1,753,239</b>	<b>347,737</b>	<b>-</b>	<b>36,304</b>	<b>1,369,198</b>	<b>-</b>	<b>-</b>

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**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Administrative Services  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-001-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2017-19 Current Service Level</b>	<b>6</b>	<b>6.00</b>	<b>1,753,239</b>	<b>347,737</b>	<b>-</b>	<b>36,304</b>	<b>1,369,198</b>	<b>-</b>	<b>-</b>
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2017-19 Current Service Level</b>	<b>6</b>	<b>6.00</b>	<b>1,753,239</b>	<b>347,737</b>	<b>-</b>	<b>36,304</b>	<b>1,369,198</b>	<b>-</b>	<b>-</b>
080 - E-Boards									
080 - May 2016 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2016 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	-	-	-	-	-	-	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(18,438)	(3,863)	-	(892)	(13,683)	-	-
092 - Statewide AG Adjustment	-	-	(866)	(134)	-	-	(732)	-	-
101 - WIOA and Employment First	11	11.00	1,847,943	714,932	-	(20,704)	1,153,715	-	-
102 - SWEP Seasonal	-	-	-	-	-	-	-	-	-
103 - Case Management System Migration	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>11</b>	<b>11.00</b>	<b>1,828,639</b>	<b>710,935</b>	<b>-</b>	<b>(21,596)</b>	<b>1,139,300</b>	<b>-</b>	<b>-</b>
<b>Total 2017-19 Governor's Budget</b>	<b>17</b>	<b>17.00</b>	<b>3,581,878</b>	<b>1,058,672</b>	<b>-</b>	<b>14,708</b>	<b>2,508,498</b>	<b>-</b>	<b>-</b>
Percentage Change From 2015-17 Leg Approved Budget	112.50%	127.27%	92.71%	231.90%	-	-58.82%	66.78%	-	-
Percentage Change From 2017-19 Current Service Level	183.33%	183.33%	104.30%	204.45%	-	-59.49%	83.21%	-	-

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Rehabilitative Services  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-002-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2015-17 Leg Adopted Budget	30	28.13	10,141,755	1,399,820	-	599,334	8,142,601	-	-
2015-17 Emergency Boards	-	-	212,817	62,903	-	(2,665)	152,579	-	-
<b>2015-17 Leg Approved Budget</b>	<b>30</b>	<b>28.13</b>	<b>10,354,572</b>	<b>1,462,723</b>	<b>-</b>	<b>596,669</b>	<b>8,295,180</b>	<b>-</b>	<b>-</b>
<b>2017-19 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	(11)	(11.02)	(1,588,516)	(546,238)	-	(5,282)	(1,036,996)	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
<b>Subtotal 2017-19 Base Budget</b>	<b>19</b>	<b>17.11</b>	<b>8,766,056</b>	<b>916,485</b>	<b>-</b>	<b>591,387</b>	<b>7,258,184</b>	<b>-</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(49,562)	(12,501)	-	2,362	(39,423)	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	(49,849)	(18,131)	-	(632)	(31,086)	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(99,411)</b>	<b>(30,632)</b>	<b>-</b>	<b>1,730</b>	<b>(70,509)</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	268,179	66,552	-	26,884	174,743	-	-
State Gov't & Services Charges Increase/(Decrease)			15,613	15,613	-	-	-	-	-

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Rehabilitative Services  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-002-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal</b>	-	-	283,792	82,165	-	26,884	174,743	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	(322,999)	(52,098)	-	-	(270,901)	-	-
<b>Subtotal: 2017-19 Current Service Level</b>	<b>19</b>	<b>17.11</b>	<b>8,627,438</b>	<b>915,920</b>	<b>-</b>	<b>620,001</b>	<b>7,091,517</b>	<b>-</b>	<b>-</b>

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**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Rehabilitative Services  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-002-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2017-19 Current Service Level</b>	<b>19</b>	<b>17.11</b>	<b>8,627,438</b>	<b>915,920</b>	<b>-</b>	<b>620,001</b>	<b>7,091,517</b>	<b>-</b>	<b>-</b>
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	(608,384)	-	-	-	(608,384)	-	-
<b>Modified 2017-19 Current Service Level</b>	<b>19</b>	<b>17.11</b>	<b>8,019,054</b>	<b>915,920</b>	<b>-</b>	<b>620,001</b>	<b>6,483,133</b>	<b>-</b>	<b>-</b>
080 - E-Boards									
080 - May 2016 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2016 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	(1)	(1.00)	(204,721)	(43,606)	-	-	(161,115)	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(34,708)	(2,832)	-	(9,189)	(22,687)	-	-
092 - Statewide AG Adjustment	-	-	(859)	-	-	-	(859)	-	-
101 - WIOA and Employment First	1	5.39	1,823,072	118,399	-	375,640	1,329,033	-	-
102 - SWEP Seasonal	2	1.00	-	-	-	-	-	-	-
103 - Case Management System Migration	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>2</b>	<b>5.39</b>	<b>1,582,784</b>	<b>71,961</b>	<b>-</b>	<b>366,451</b>	<b>1,144,372</b>	<b>-</b>	<b>-</b>
<b>Total 2017-19 Governor's Budget</b>	<b>21</b>	<b>22.50</b>	<b>9,601,838</b>	<b>987,881</b>	<b>-</b>	<b>986,452</b>	<b>7,627,505</b>	<b>-</b>	<b>-</b>
Percentage Change From 2015-17 Leg Approved Budget	-30.00%	-20.01%	-7.27%	-32.46%	-	65.33%	-8.05%	-	-
Percentage Change From 2017-19 Current Service Level	10.53%	31.50%	11.29%	7.86%	-	59.10%	7.56%	-	-

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Business Enterprises  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-003-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2015-17 Leg Adopted Budget	5	5.00	1,275,703	535,358	-	225,060	515,285	-	-
2015-17 Emergency Boards	-	-	4,150,259	696,528	-	197,533	3,256,198	-	-
<b>2015-17 Leg Approved Budget</b>	<b>5</b>	<b>5.00</b>	<b>5,425,962</b>	<b>1,231,886</b>	<b>-</b>	<b>422,593</b>	<b>3,771,483</b>	<b>-</b>	<b>-</b>
<b>2017-19 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	133,538	115,783	-	-	17,755	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	-	-	-	-	-	-	-
Base Nonlimited Adjustment	-	-	-	-	-	-	-	-	-
Capital Construction	-	-	-	-	-	-	-	-	-
<b>Subtotal 2017-19 Base Budget</b>	<b>5</b>	<b>5.00</b>	<b>5,559,500</b>	<b>1,347,669</b>	<b>-</b>	<b>422,593</b>	<b>3,789,238</b>	<b>-</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(25,086)	(15,824)	-	-	(9,262)	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	14,949	14,307	-	(147)	789	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(10,137)</b>	<b>(1,517)</b>	<b>-</b>	<b>(147)</b>	<b>(8,473)</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(2,503,330)	(680,109)	-	(199,049)	(1,624,172)	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(2,503,330)</b>	<b>(680,109)</b>	<b>-</b>	<b>(199,049)</b>	<b>(1,624,172)</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	35,222	15,477	-	9,498	10,247	-	-
State Gov't & Services Charges Increase/(Decrease)	-	-	10,399	10,399	-	-	-	-	-

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**Summary of 2017-19 Biennium Budget**

Commission for the Blind  
 Business Enterprises  
 2017-19 Biennium

Governor's Budget  
 Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal	-	-	45,621	25,876	-	9,498	10,247	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2017-19 Current Service Level</b>	<b>5</b>	<b>5.00</b>	<b>3,091,654</b>	<b>691,919</b>	<b>-</b>	<b>232,895</b>	<b>2,166,840</b>	<b>-</b>	<b>-</b>

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Business Enterprises  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-003-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2017-19 Current Service Level</b>	<b>5</b>	<b>5.00</b>	<b>3,091,654</b>	<b>691,919</b>	<b>-</b>	<b>232,895</b>	<b>2,166,840</b>	<b>-</b>	<b>-</b>
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2017-19 Current Service Level</b>	<b>5</b>	<b>5.00</b>	<b>3,091,654</b>	<b>691,919</b>	<b>-</b>	<b>232,895</b>	<b>2,166,840</b>	<b>-</b>	<b>-</b>
080 - E-Boards									
080 - May 2016 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2016 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	(0.50)	(90,552)	(90,552)	-	-	-	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(15,175)	(1,881)	-	(7,224)	(6,070)	-	-
092 - Statewide AG Adjustment	-	-	(2,258)	-	-	(603)	(1,655)	-	-
101 - WIOA and Employment First	-	-	(26,322)	(478,774)	-	107,142	345,310	-	-
102 - SWEP Seasonal	-	-	-	-	-	-	-	-	-
103 - Case Management System Migration	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>-</b>	<b>(0.50)</b>	<b>(134,307)</b>	<b>(571,207)</b>	<b>-</b>	<b>99,315</b>	<b>337,585</b>	<b>-</b>	<b>-</b>
<b>Total 2017-19 Governor's Budget</b>	<b>5</b>	<b>4.50</b>	<b>2,957,347</b>	<b>120,712</b>	<b>-</b>	<b>332,210</b>	<b>2,504,425</b>	<b>-</b>	<b>-</b>
Percentage Change From 2015-17 Leg Approved Budget	-	-10.00%	-45.50%	-90.20%	-	-21.39%	-33.60%	-	-
Percentage Change From 2017-19 Current Service Level	-	-10.00%	-4.34%	-82.55%	-	42.64%	15.58%	-	-

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Industries for the Blind  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-004-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2015-17 Leg Adopted Budget	-	-	-	-	-	-	-	-	-
2015-17 Emergency Boards	-	-	-	-	-	-	-	-	-
<b>2015-17 Leg Approved Budget</b>	-	-	-	-	-	-	-	-	-
<b>2017-19 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	-	-	-	-	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
<b>Subtotal 2017-19 Base Budget</b>	-	-	-	-	-	-	-	-	-
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Non-PICS Personal Service Increase/(Decrease)	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	-	-	-	-	-	-	-	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	-	-	-	-	-	-	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	-	-	-	-	-	-	-	-	-
040 - Mandated Caseload									

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**Summary of 2017-19 Biennium Budget**

Commission for the Blind  
Industries for the Blind  
2017-19 Biennium

Governor's Budget  
Cross Reference Number: 58500-004-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2017-19 Current Service Level</b>	-	-	-	-	-	-	-	-	-

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Industries for the Blind  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-004-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2017-19 Current Service Level</b>	-	-	-	-	-	-	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2017-19 Current Service Level</b>	-	-	-	-	-	-	-	-	-
080 - E-Boards									
080 - May 2016 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	-	-	-	-	-	-	-	-	-
Policy Packages									
081 - September 2016 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	-	-	-	-	-	-	-	-
091 - Statewide Adjustment DAS Chgs	-	-	-	-	-	-	-	-	-
092 - Statewide AG Adjustment	-	-	-	-	-	-	-	-	-
101 - WIOA and Employment First	-	-	-	-	-	-	-	-	-
102 - SWEP Seasonal	-	-	-	-	-	-	-	-	-
103 - Case Management System Migration	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	-	-	-	-	-	-	-	-	-
<b>Total 2017-19 Governor's Budget</b>	-	-	-	-	-	-	-	-	-
Percentage Change From 2015-17 Leg Approved Budget	-	-	-	-	-	-	-	-	-
Percentage Change From 2017-19 Current Service Level	-	-	-	-	-	-	-	-	-

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**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Orientation Cntr for the Blind  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-005-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2015-17 Leg Adopted Budget	13	11.60	2,983,962	652,642	-	130,099	2,201,221	-	-
2015-17 Emergency Boards	-	-	78,889	25,313	-	(1,539)	55,115	-	-
<b>2015-17 Leg Approved Budget</b>	<b>13</b>	<b>11.60</b>	<b>3,062,851</b>	<b>677,955</b>	<b>-</b>	<b>128,560</b>	<b>2,256,336</b>	<b>-</b>	<b>-</b>
<b>2017-19 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	3	2.50	581,531	104,920	-	(1,740)	478,351	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
<b>Subtotal 2017-19 Base Budget</b>	<b>16</b>	<b>14.10</b>	<b>3,644,382</b>	<b>782,875</b>	<b>-</b>	<b>126,820</b>	<b>2,734,687</b>	<b>-</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(67,509)	(17,920)	-	-	(49,589)	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	26,577	5,863	-	(288)	21,002	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(40,932)</b>	<b>(12,057)</b>	<b>-</b>	<b>(288)</b>	<b>(28,587)</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	80,647	42,202	-	4,640	33,805	-	-
State Gov't & Services Charges Increase/(Decrease)			29,697	29,697	-	-	-	-	-

**Summary of 2017-19 Biennium Budget**

Commission for the Blind  
Orientation Cntr for the Blind  
2017-19 Biennium

Governor's Budget  
Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal</b>	-	-	110,344	71,899	-	4,640	33,805	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2017-19 Current Service Level</b>	<b>16</b>	<b>14.10</b>	<b>3,713,794</b>	<b>842,717</b>	<b>-</b>	<b>131,172</b>	<b>2,739,905</b>	<b>-</b>	<b>-</b>

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**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Orientation Cntr for the Blind  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-005-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2017-19 Current Service Level</b>	<b>16</b>	<b>14.10</b>	<b>3,713,794</b>	<b>842,717</b>	<b>-</b>	<b>131,172</b>	<b>2,739,905</b>	<b>-</b>	<b>-</b>
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	(200,000)	-	-	-	(200,000)	-	-
<b>Modified 2017-19 Current Service Level</b>	<b>16</b>	<b>14.10</b>	<b>3,513,794</b>	<b>842,717</b>	<b>-</b>	<b>131,172</b>	<b>2,539,905</b>	<b>-</b>	<b>-</b>
080 - E-Boards									
080 - May 2016 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2016 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	(2)	(1.60)	(545,168)	(109,845)	-	-	(435,323)	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(19,706)	(6,501)	-	-	(13,205)	-	-
092 - Statewide AG Adjustment	-	-	(253)	(50)	-	-	(203)	-	-
101 - WIOA and Employment First	(2)	(1.50)	(290,514)	(157,570)	-	(130,108)	(2,836)	-	-
102 - SWEP Seasonal	-	-	-	-	-	-	-	-	-
103 - Case Management System Migration	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>(4)</b>	<b>(3.10)</b>	<b>(855,641)</b>	<b>(273,966)</b>	<b>-</b>	<b>(130,108)</b>	<b>(451,567)</b>	<b>-</b>	<b>-</b>
<b>Total 2017-19 Governor's Budget</b>	<b>12</b>	<b>11.00</b>	<b>2,658,153</b>	<b>568,751</b>	<b>-</b>	<b>1,064</b>	<b>2,088,338</b>	<b>-</b>	<b>-</b>
Percentage Change From 2015-17 Leg Approved Budget	-7.69%	-5.17%	-13.21%	-16.11%	-	-99.17%	-7.45%	-	-
Percentage Change From 2017-19 Current Service Level	-25.00%	-21.99%	-28.42%	-32.51%	-	-99.19%	-23.78%	-	-

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Independent Living Services  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-006-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2015-17 Leg Adopted Budget	-	-	-	-	-	-	-	-	-
2015-17 Emergency Boards	-	-	-	-	-	-	-	-	-
<b>2015-17 Leg Approved Budget</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>2017-19 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	10	10.00	1,852,517	701,934	-	-	1,150,583	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
<b>Subtotal 2017-19 Base Budget</b>	<b>10</b>	<b>10.00</b>	<b>1,852,517</b>	<b>701,934</b>	<b>-</b>	<b>-</b>	<b>1,150,583</b>	<b>-</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(51,077)	(19,230)	-	-	(31,847)	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	75,313	30,022	-	-	45,291	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>24,236</b>	<b>10,792</b>	<b>-</b>	<b>-</b>	<b>13,444</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	31,810	31,810	-	-	-	-	-
State Gov't & Services Charges Increase/(Decrease)	-	-	7,807	7,807	-	-	-	-	-

**Summary of 2017-19 Biennium Budget**

Commission for the Blind  
 Independent Living Services  
 2017-19 Biennium

Governor's Budget  
 Cross Reference Number: 58500-006-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal</b>	-	-	39,617	39,617	-	-	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	322,999	52,098	-	-	270,901	-	-
<b>Subtotal: 2017-19 Current Service Level</b>	<b>10</b>	<b>10.00</b>	<b>2,239,369</b>	<b>804,441</b>	-	-	<b>1,434,928</b>	-	-

**Summary of 2017-19 Biennium Budget**

**Commission for the Blind  
Independent Living Services  
2017-19 Biennium**

**Governor's Budget  
Cross Reference Number: 58500-006-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2017-19 Current Service Level</b>	<b>10</b>	<b>10.00</b>	<b>2,239,369</b>	<b>804,441</b>	-	-	<b>1,434,928</b>	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2017-19 Current Service Level</b>	<b>10</b>	<b>10.00</b>	<b>2,239,369</b>	<b>804,441</b>	-	-	<b>1,434,928</b>	-	-
080 - E-Boards									
080 - May 2016 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2016 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	(1)	(1.00)	(188,283)	(188,283)	-	-	-	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(9,531)	(2,493)	-	-	(7,038)	-	-
092 - Statewide AG Adjustment	-	-	-	-	-	-	-	-	-
101 - WIOA and Employment First	-	(2.50)	(485,985)	(197,337)	-	-	(288,648)	-	-
102 - SWEP Seasonal	-	-	-	-	-	-	-	-	-
103 - Case Management System Migration	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>(1)</b>	<b>(3.50)</b>	<b>(683,799)</b>	<b>(388,113)</b>	<b>-</b>	<b>-</b>	<b>(295,686)</b>	<b>-</b>	<b>-</b>
<b>Total 2017-19 Governor's Budget</b>	<b>9</b>	<b>6.50</b>	<b>1,555,570</b>	<b>416,328</b>	<b>-</b>	<b>-</b>	<b>1,139,242</b>	<b>-</b>	<b>-</b>
Percentage Change From 2015-17 Leg Approved Budget	-	-	-	-	-	-	-	-	-
Percentage Change From 2017-19 Current Service Level	-10.00%	-35.00%	-30.54%	-48.25%	-	-	-20.61%	-	-

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# Budget Narrative

## Program Prioritization

### Program Prioritization for 2017-19

Agency Name: Commission for the Blind																					
2017-19 Biennium																		Agency Number:		58500	
Agency Wide																					
Program/Division Priorities for 2017-19 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL included in Agency Request	
Agcy	Prgm/Div																				
1	1	CFB	VR	Vocational Rehabilitation Services	1,2,3,4	7	1,034,319		995,641		7,813,166		\$ 9,843,126	22	23.50	Y	Y	FM	PL113-128	Maintain Vocational Rehabilitation Program	Increased revenue and positions to support WIOA Implementation
1	1	CFB	OCCB	Vocational Rehabilitation - Orientation and Career Center for the Blind	1,2,3,4	7	685,147		1,064		2,537,069		\$ 3,223,280	14	12.60	N	Y	FM	PL113-128	Maintain Vocational Rehabilitation Program	
2	1	CFB	BE	Business Enterprise Program	1,3,4	7	213,145		340,037		2,512,150		\$ 3,065,332	5	5.00	N	N	FO	ORS 346-510-570	Various licensing and regulatory functions	
3	1	CFB	IL-OB	Independent Living - Older Blind	2,3,4	7	607,104		0		1,146,280		\$ 1,753,384	10	7.50	N	Y	FM	PL113-128	Maintain Independent Living Program	
N/A	N/A	CFB	Admin	Administrative Services	3,4	4	1,702,457		15,600		2,522,913		\$ 4,240,970	18	17.50	N	N			Maintain support of Vocational Rehabilitation and Independent Living Programs	Consolidated direct support staff for both Vocational Rehabilitation and Independent Living Programs
							4,242,172	-	1,352,342	-	16,531,578	#	\$ 22,126,092	69	66.10						

**7. Primary Purpose Program/Activity Exists**

- 1 Civil Justice
- 2 Community Development
- 3 Consumer Protection
- 4 Administrative Function
- 5 Criminal Justice
- 6 Economic Development
- 7 Education & Skill Development
- 8 Emergency Services
- 9 Environmental Protection
- 10 Public Health
- 11 Recreation, Heritage, or Cultural
- 12 Social Support

**19. Legal Requirement Code**

- C Constitutional
- D Debt Service
- FM Federal - Mandatory
- FO Federal - Optional (once you choose to participate, certain requirements exist)
- S Statutory

Within each Program/Division area, prioritize each Budget Program Unit (Activities) by detail budget level in ORBITS

Document criteria used to prioritize activities:

# Budget Narrative

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## Reduction Options

### Overview

Oregon Commission for the Blind (OCB) is the only service provision agency in Oregon that provides vocational rehabilitation and independent living services to adults who are blind. The agency budgeted is concentrated in two areas: Personnel Services, largely for specialized counselor and teaching staff and Special Payments, which fund services, equipment and training for clients. The following reduction options are made from the modified Current Service Level (CSL).

Because all of the agency programs leverage federal funds that require a state contribution in the form of matching dollars, reductions in general and other funds result in a reduction in federal funds. If reductions were required, the agency would strive to balance reductions within Personal Services and Special Payments. These are the most significant non-fixed costs in our budget.

### Overall Impact

Federal grants on which OCB relies for the majority of its funding have relatively low match requirements. Every \$1 cut in state funding results in a loss of approximately \$4 in federal resources to assist Oregonians who are blind and visually impaired. The following reduction options will result in fewer Oregonians served, longer wait times for those who are served and delays in re-entering the work force for Vocational Rehabilitation clients. The inability to assist adults who are blind will reduce their access to crucial skills that allow them to remain independent and will likely increase costs at assistance facilities and residential care facilities. Programs for youth transitioning from high school will be eliminated. These cuts, combined with cuts in the revenue shortfall package will severely impact our ability to provide timely service in rural areas.

## Budget Narrative

### 12.0% Reductions Taken at Governor's Budget

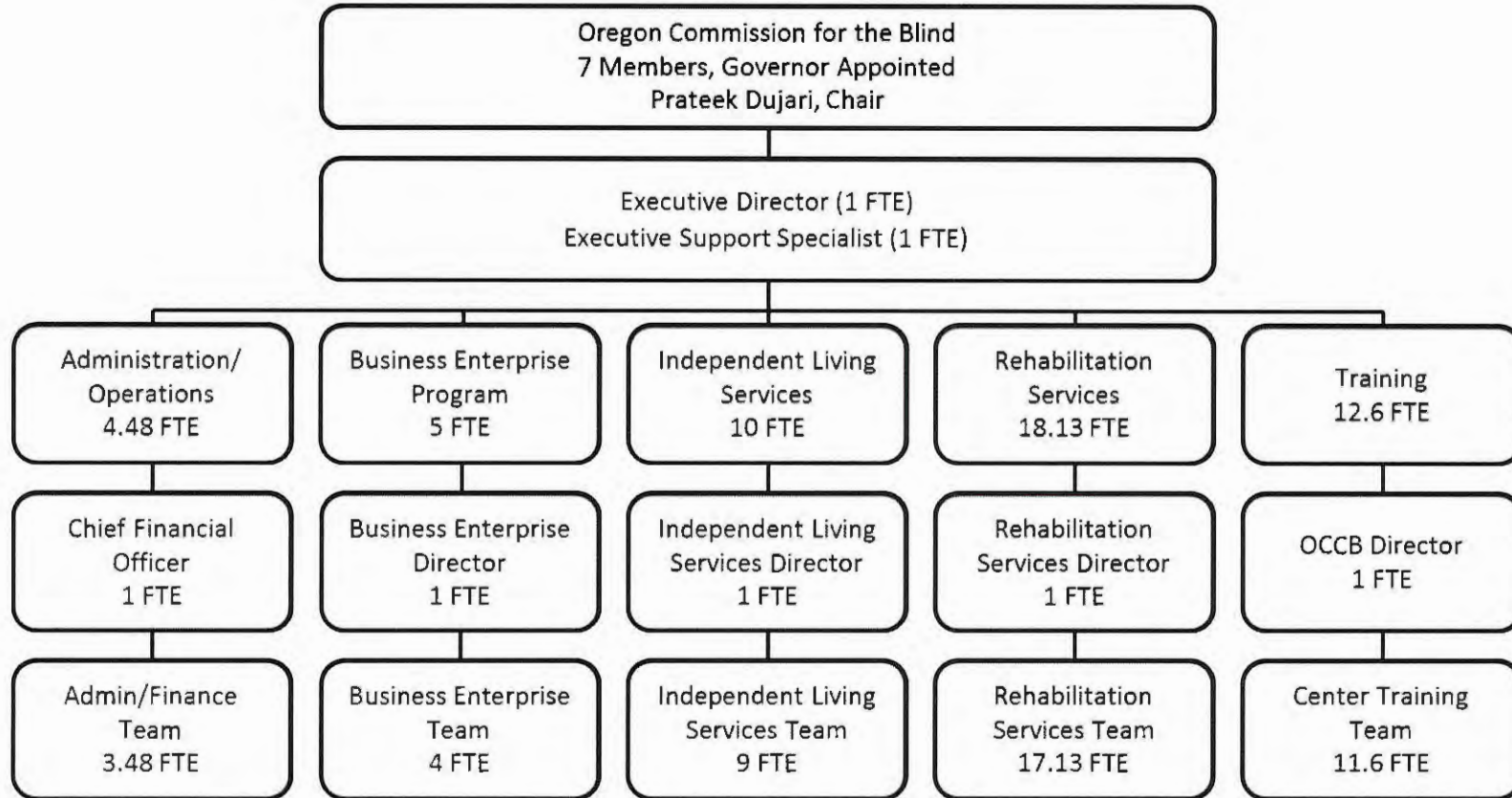
Reductions Taken at Governor's Budget									
Description	Program Unit	Position #	Category	GF	OF	FF	TF	Pos.	FTE
Vocational Rehabilitation Counselor	Reduction reverses the progress made in reducing the time to process applications and plans and will also increase caseload sized, affecting employment outcomes.	7042004	Personal Services	(43,606)		(161,115)	(204,721)	(1)	(1.00)
Special Payment - Clients	Reduces resources to purchase training, equipment, etc., for clients in the Vocational Rehabilitation program.		Special Payments	(53,781)		(198,712)	(252,493)		
BE Business Development Specialist	Reduction reverses prior biennium investment in growth the Business Enterprise program and expanding opportunities in the state for these businesses for certified managers who are blind.	0800004	Personal Services	(90,552)			(90,552)		(0.50)
Activities of Daily Living Instructor	This reduction impedes the Agency's ability to provide individualized training related to blindness that prepares individuals for employment.	2330003	Personal Services	(33,977)		(154,998)	(188,975)	(1)	(1.00)
Manual Arts Instructor	This reduction alters the Agency's program for adjustment to blindness that support individuals who are in the grieving / adjustment after experiencing vision loss.	5854001	Personal Services	(22,087)		(81,613)	(103,700)	(1)	(0.60)
Independent Living Instructor	Reduction reverses prior biennium investment in direct services to older Oregonians who are blind allowing them to live independently.	0800001	Personal Services	(188,283)			(188,283)	(1)	(1.00)
<b>PKG 090 Analyst Adjustments</b>				<b>(432,286)</b>	<b>-</b>	<b>(596,438)</b>	<b>(1,028,724)</b>	<b>(4)</b>	<b>(4.10)</b>
Case Management System	Workforce Innovation and Opportunity Act system reporting and tracking requirements will require an upgrade to the case management system. This is not in the Governor's Budget due to general fund constraints.		Personal Services	(101,038)			(101,038)	(1)	(0.50)
			Shared Services	(538,750)			(538,750)		
<b>PKG 103 Analyst Adjustment</b>				<b>(639,788)</b>	<b>-</b>	<b>-</b>	<b>(639,788)</b>	<b>(1)</b>	<b>(0.50)</b>
<b>Analyst Recommended Reductions</b>				<b>(1,072,074)</b>	<b>-</b>	<b>(596,438)</b>	<b>(1,668,512)</b>	<b>(5)</b>	<b>(4.60)</b>



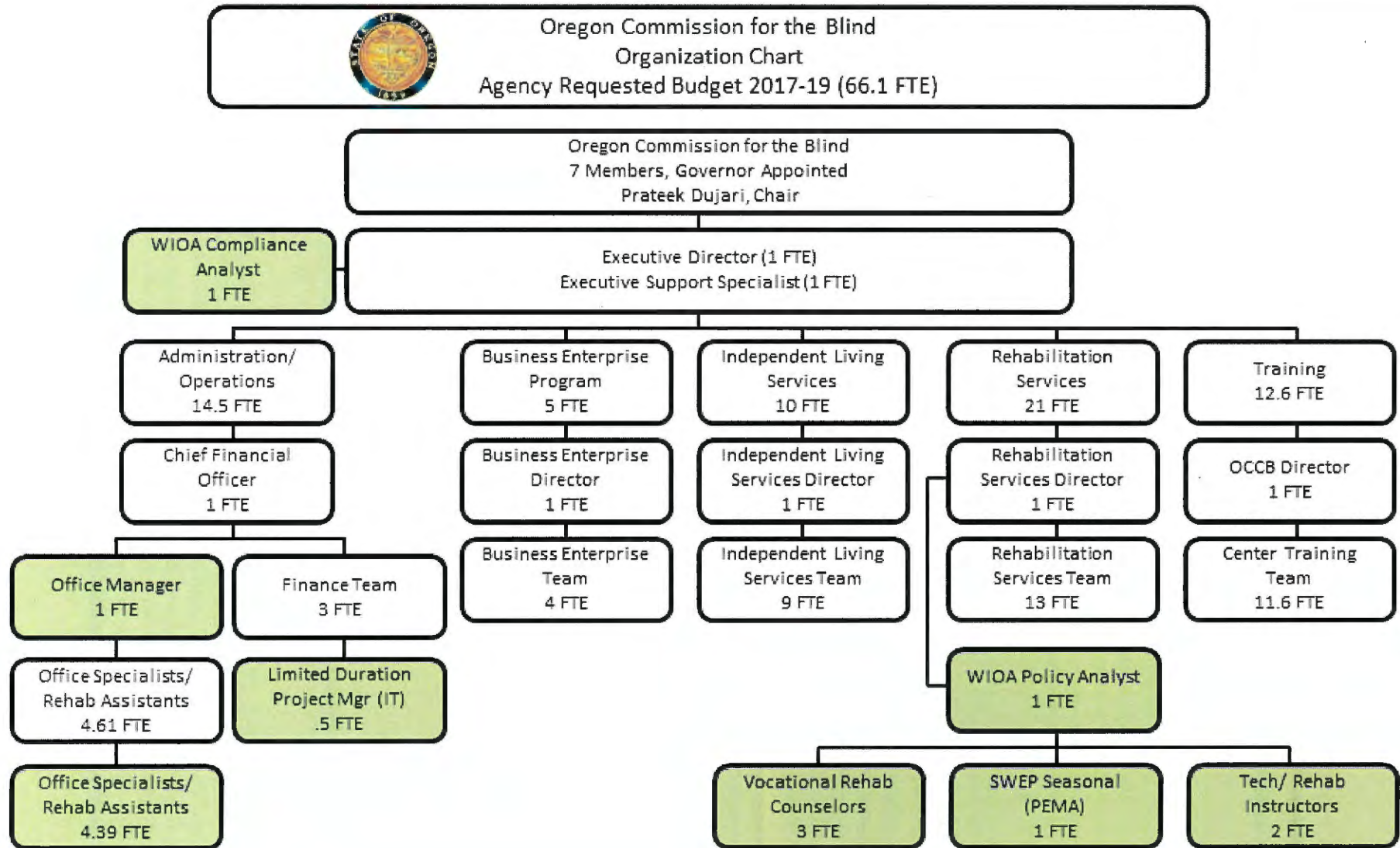
# Budget Narrative



Oregon Commission for the Blind  
 Organization Chart  
 2015-17 (52.21 FTE)



# Budget Narrative

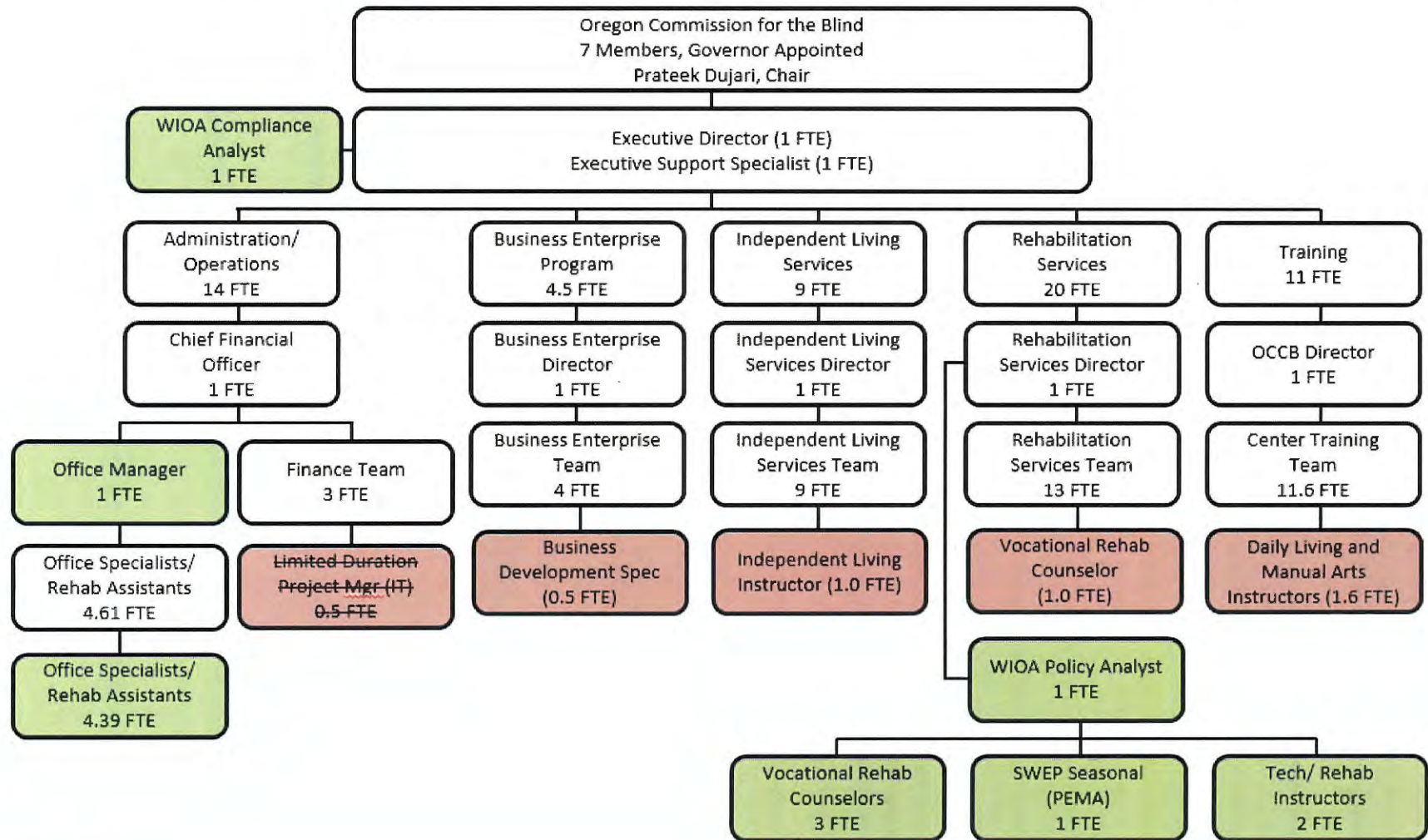


\* POP 101 WIOA

# Budget Narrative



Oregon Commission for the Blind  
 Organization Chart  
 Governor's Budget 2017-19 (61.5 FTE)



\* POP 101 WIOA

\* Not Included in Governor's Budget



Summary Cross Reference Number	Cross Reference Description	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
001-00-00-00000	<b>Administrative Services</b>						
	General Fund	327,400	305,172	318,976	1,702,457	1,058,672	-
	Other Funds	233,635	37,601	35,717	15,600	14,708	-
	Federal Funds	1,230,375	1,460,596	1,504,038	2,522,913	2,508,498	-
	All Funds	1,791,410	1,803,369	1,858,731	4,240,970	3,581,878	-
002-00-00-00000	<b>Rehabilitative Services</b>						
	General Fund	1,013,638	1,399,820	1,462,723	1,034,319	987,881	-
	Other Funds	579,072	599,334	596,669	995,641	986,452	-
	Federal Funds	8,152,180	8,142,601	8,295,180	7,812,166	7,627,505	-
	All Funds	9,744,890	10,141,755	10,354,572	9,842,126	9,601,838	-
003-00-00-00000	<b>Business Enterprises</b>						
	General Fund	49,726	535,358	1,231,886	213,145	120,712	-
	Other Funds	303,241	225,060	422,593	340,037	332,210	-
	Federal Funds	990,371	515,285	3,771,483	2,512,150	2,504,425	-
	All Funds	1,343,338	1,275,703	5,425,962	3,065,332	2,957,347	-
004-00-00-00000	<b>Industries for the Blind</b>						
	Other Funds	395,742	-	-	-	-	-
005-00-00-00000	<b>Orientation Cntr for the Blind</b>						
	General Fund	191,834	652,642	677,955	685,147	568,751	-

Summary Cross Reference Number	Cross Reference Description	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
005-00-00-00000	<b>Orientation Cntr for the Blind</b>						
	Other Funds	155,506	130,099	128,560	1,064	1,064	-
	Federal Funds	2,311,044	2,201,221	2,256,336	2,537,069	2,088,338	-
	All Funds	2,658,384	2,983,962	3,062,851	3,223,280	2,658,153	-
006-00-00-00000	<b>Independent Living Services</b>						
	General Fund	-	-	-	607,104	416,328	-
	Federal Funds	-	-	-	1,146,280	1,139,242	-
	All Funds	-	-	-	1,753,384	1,555,570	-
<b>TOTAL AGENCY</b>							
	General Fund	1,582,598	2,892,992	3,691,540	4,242,172	3,152,344	-
	Other Funds	1,667,196	992,094	1,183,539	1,352,342	1,334,434	-
	Federal Funds	12,683,970	12,319,703	15,827,037	16,530,578	15,868,008	-
	All Funds	15,933,764	16,204,789	20,702,116	22,125,092	20,354,786	-

# Budget Narrative

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## REVENUE

# Budget Narrative

## Revenue Forecast Narrative

### Overview

The largest revenue source for the agency comes from federal formula grants from the US Department of Education and the US Department of Health and Human Services to administer vocational rehabilitation and independent living programs. This budget reflects 74.7% of total revenue coming from federal awards. These federal grants require a state contribution in the form of matching funds.

The agency budget includes an increase in federal revenue as a result of an update in the Memorandum of Understanding between the Department of Human Resources and the Commission for the Blind. This agreement revised the percentage of the federal award for Oregon for vocational rehabilitation that comes to the Commission for the Blind from 12.5% to 15.6%. This updated percentage reflects the national average for separate agencies for the Blind. This change is reflected in package 070 and package 101 below.

	General Fund	Other Funds	Federal Funds	Total Funds
Current Service Level Expenditures	\$3,602,734	\$1,058,207	\$14,802,388	\$19,463,329
Revenue Shortfall Package 070			(\$808,384)	(\$808,384)
Modified Current Service Level	\$3,602,734	\$1,058,207	\$13,994,004	\$18,654,945
Package 101 - WIOA Implementation	\$0	\$294,135	\$2,536,574	\$2,830,709
Package 102 - SWEP Seasonal Staff	\$0	\$0	\$0	\$0
Package 103 - Case Management System Migration	\$639,788	\$0	\$0	\$639,788



## Budget Narrative

Total Revenues - Agency Request	\$4,242,522	\$1,352,342	\$16,530,578	\$22,125,442
Package 090 - Analyst Rec	(\$432,286)	\$0	(\$596,438)	(\$1,028,724)
Package 091 - Statewide Adjustment DAS Charges	(\$17,570)	\$0	(\$62,683)	(\$80,253)
Package 092 - Statewide AG Adjustment	(\$184)	\$0	(\$3,449)	(\$3,633)
Package 103 - Case Management System Migration	(\$639,788)	\$0	\$0	(\$639,788)
Total Revenues - Governor's Budget	<u>\$3,152,694</u>	<u>\$1,352,342</u>	<u>\$15,868,008</u>	<u>\$20,373,044</u>

### Federal Funds

OCB projects Federal Fund revenue of \$16,530,578 with approval of our requested Policy Option Package 101 with the increase Vocational Rehabilitative Basic 110 grant split from 12.5 percent to 15.6 percent. Projected Federal Funds revenue is \$13,994,004 without Policy Option Package 101 with a revenue shortfall of \$808,384. All agency programs are heavily funded with federal funds, with the overall budget 74.7 percent federally funded.

Source: Formula and special grants from the U. S. Department of Education, Rehabilitation Services Administration (RSA) as authorized by the Workforce Innovation and Opportunity Act of 2014, PL 113-128.

Required Match: Vocational Rehabilitation (VR) Basic Support 78.7% federal/ 21.3% state.  
Supported Employment 50% of grant is 90% federal/ 10% state, remaining is 100% federal.  
Independent Living (Older Blind and Part B) 90% federal/ 10% state.

Limitations on Use: Funds can be expended only for the purposes and in the manner described in federal law or regulation or in grant agreements.

## Budget Narrative

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Basis for the 2015-17 Estimate: A 4.0% annual inflation on the VR grant award, the remaining grants are projected to remain flat, as there have been no increases in federal funding over the past few federal fiscal years.

### Other Funds

Other Fund revenues are projected to be \$1,352,342.

**Business Enterprise Program** – Other funds received through the Business Enterprise Set-Aside program (ORS 346.570) and Randolph-Sheppard Vending Stand Act ((P.L. 74-732). Expenditure of Business Enterprise Set-Aside funds is restricted to designated uses such as purchase, repair or maintenance of equipment used for program activities. The Business Enterprise Set-Aside program is supported, in part, by its program revenues.

**Third-Party Cooperative Agreements** – Other funds received through third-party cooperative agreements with education providers comprises the majority of the remaining other funds. These agreements support pre-employment transitional services for youth, as required under WIOA at a required rate of 15% of the annual grant award. Other Funds revenue received through cooperative services agreements benefits the Vocational Rehabilitation (VR) Services program. It is our practice to use Other Funds revenue, where permissible, to match available Federal Revenue. To the degree such funds are allocated for this purpose, all programs benefit.

**Basis for the 2015-17 Estimate** – Estimates are based on continuation of existing and an increase in the number of cooperative agreements, revenue increases within the Business Enterprise program. Donations and sales of devices are based on recent revenue data (no inflation). Donations may have a designated for use within allowances of federal and state law.

# DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Source	Fund	ORBITS Revenue Acct	2013-2015 Actual	2015-17 Legislatively Adopted	2015-17 Estimated	2017-19		
						Agency Request	Governor's	Legislatively Adopted
<u>58500-000-00-00-00000</u>								
Charges for Services	OF	0410	0	0	0	0	0	
Interest Income	OF	0605	0	1,200	1,200	0	0	
Sales Income	OF	0705	49,225	15,600	15,600	15,600	15,600	
Donations	OF	0905	0	59,562	59,562	0	0	
Other Revenue	OF	0975	926,121	993,000	1,184,445	1,336,742	1,336,742	
Transfers In – Intrafund	OF	1010	1,128,816	0	0	0	0	
Transfers Out – Intrafund	OF	2010	(1,128,816)	0	0	0	0	
<b>TOTAL OTHER FUNDS</b>			<b>975,346</b>	<b>1,069,362</b>	<b>1,260,807</b>	<b>1,352,342</b>	<b>1,352,342</b>	
Federal Funds	FF	0995	12,657,747	12,361,939	15,869,273	16,530,578	15,868,008	
<b>TOTAL FEDERAL FUNDS</b>			<b>12,657,747</b>	<b>12,361,939</b>	<b>15,869,273</b>	<b>16,530,578</b>	<b>15,868,008</b>	

\_\_\_ Agency Request

  X   Governor's Budget

\_\_\_ Legislatively Adopted

Budget Page \_\_\_

**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

Commission for the Blind  
2017-19 Biennium

Agency Number: 58500  
Cross Reference Number: 58500-000-00-00-00000

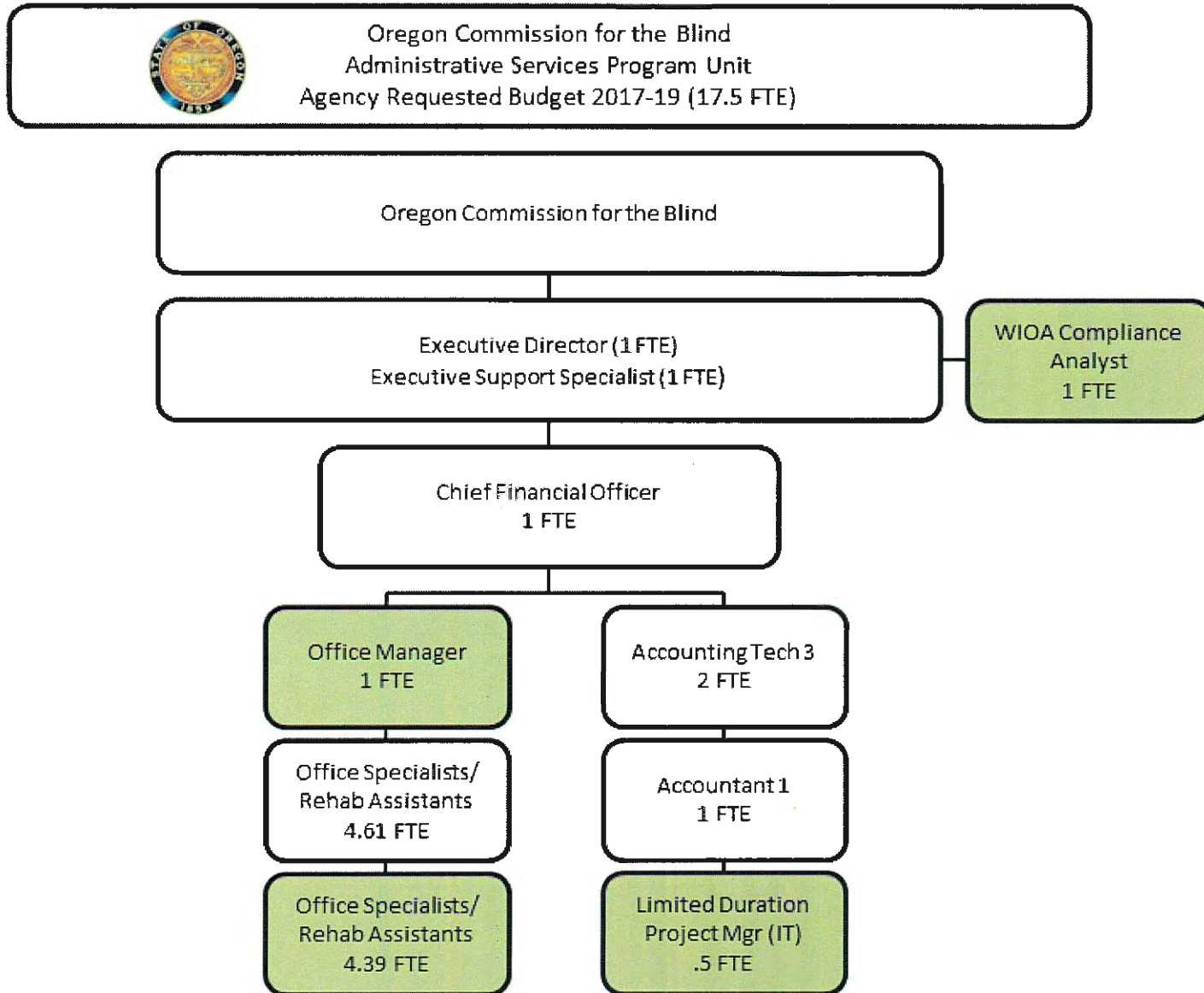
<i>Source</i>	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
<b>Other Funds</b>						
Interest Income	-	1,200	1,200	-	-	-
Sales Income	49,225	15,600	15,600	15,600	15,600	-
Donations	-	59,562	59,562	-	-	-
Other Revenues	926,121	993,000	1,184,445	1,336,742	1,336,742	-
Transfer In - Intrafund	1,128,816	-	-	-	-	-
Transfer Out - Intrafund	(1,128,816)	-	-	-	-	-
<b>Total Other Funds</b>	<b>\$975,346</b>	<b>\$1,069,362</b>	<b>\$1,260,807</b>	<b>\$1,352,342</b>	<b>\$1,352,342</b>	<b>-</b>
<b>Federal Funds</b>						
Federal Funds	12,657,747	12,361,939	15,869,273	16,530,578	15,868,008	-
<b>Total Federal Funds</b>	<b>\$12,657,747</b>	<b>\$12,361,939</b>	<b>\$15,869,273</b>	<b>\$16,530,578</b>	<b>\$15,868,008</b>	<b>-</b>

# Budget Narrative

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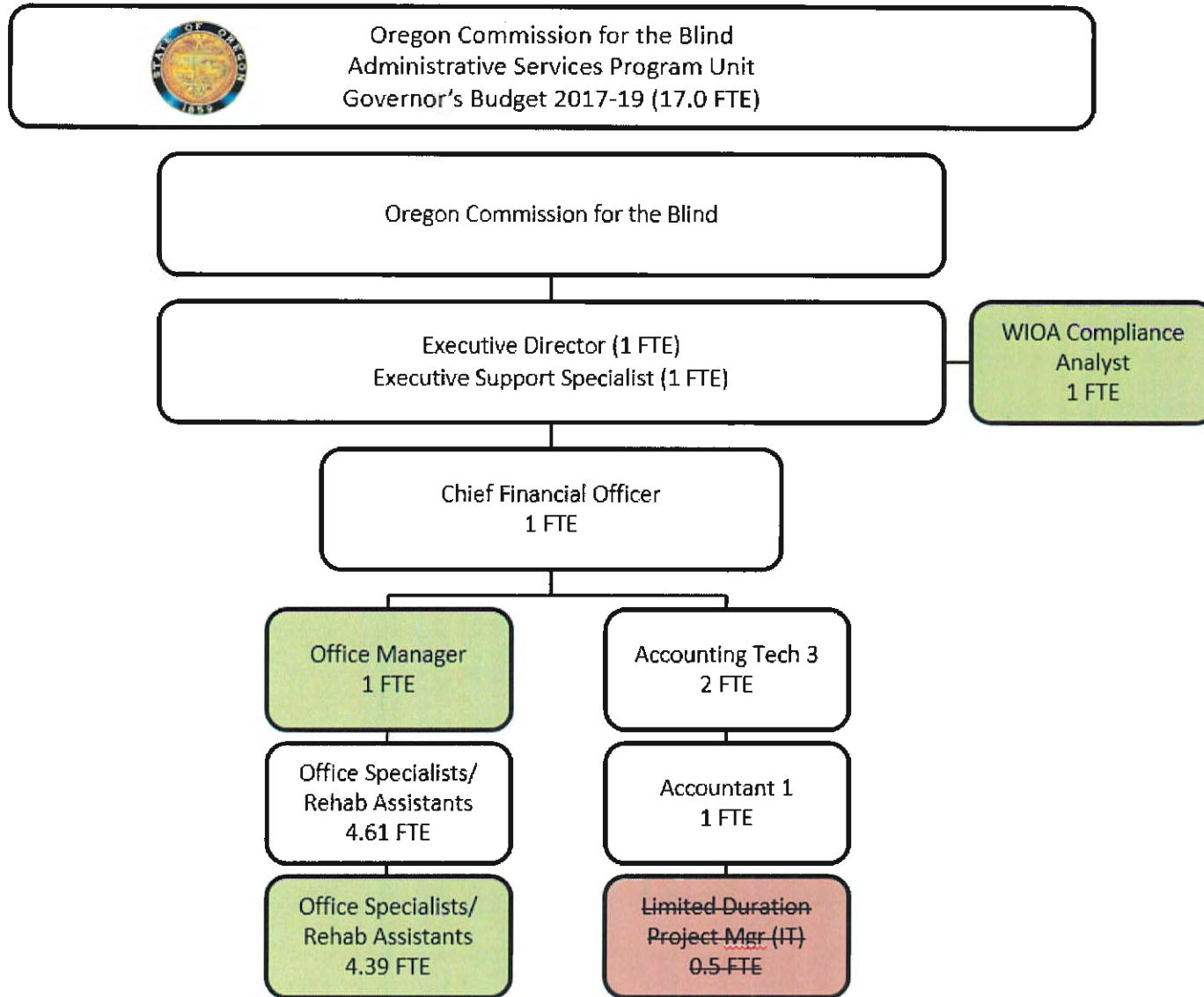
## ADMINISTRATIVE SERVICES

# Budget Narrative



\* POP 101 WIOA

# Budget Narrative



\* POP 101 WIOA

\* Not Included in Governor's Budget

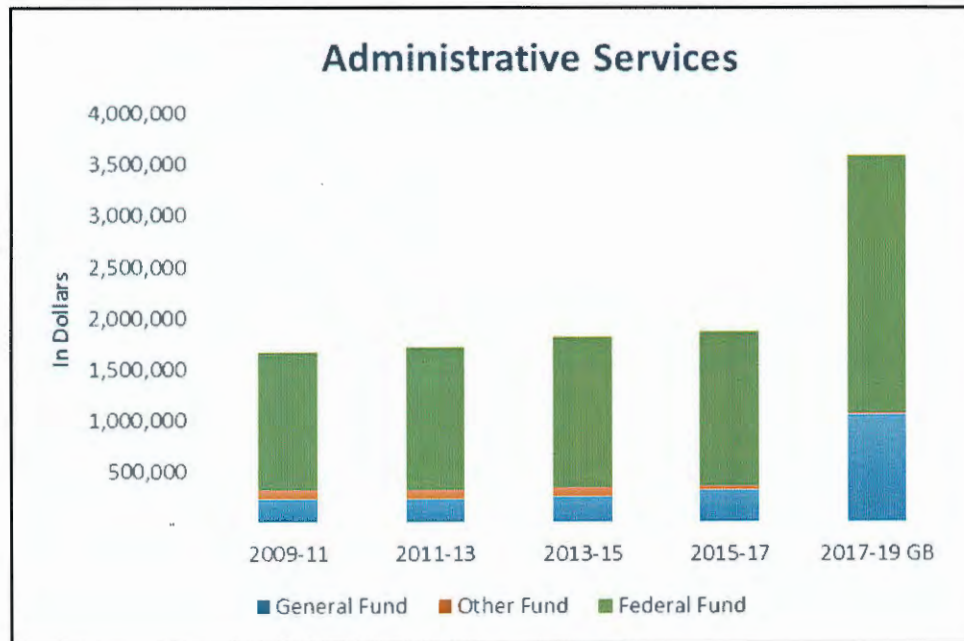


# Budget Narrative

## Administrative Services Program Unit Executive Summary

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# Budget Narrative

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## Program Overview

As part of Policy Option Package 101 – WIOA Implementation, direct service support for all programs are consolidated into Administrative Service. Additionally, supervision of direct service and monitoring of expansion of the WIOA Implementation is added into this program. This provides for direct service support of both the Vocational Rehabilitation and Independent Living programs, increasing direct service to clients within each program.

The Administrative Services Program unit aligns with Governor Brown’s priority to ensure Excellence in State Government. The agency’s business intelligence strategy utilizes outcome based management that emphasizes accountability and transparency throughout the organization. We focus on measuring results that tell the agency that we are meeting the needs of our customers, delivering results, and focusing on the priorities established by the Governor and the Commission.

The Administrative Services Program Unit provides leadership, financial management, program monitoring and administrative support for the agency’s programs. It includes the Executive Director’s Office, Chief Financial Officer, accounting, budget, payroll and benefits and information technology/data processing activities and now provides the direct service support all under a single reporting structure.

## Program Funding Request

The Requested Budget for the Administrative Services Program Unit budget projections are summarized below. Projections for 2017-19 and beyond include additional enhancements for centralized direct program support as described in Policy Option Package 101. Additionally, Policy Option Package 101 general fund request is phased out starting in 2019-21, except for ongoing annual licensing fees over and above current expenditures, as these are one time costs.

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	<b>2017-19 GB</b>	<b>2019-21</b>	<b>2021-2023</b>	<b>2023-25</b>
General Fund	1,058,672	1,151,113	1,184,495	1,218,845
Other Fund	14,708	15,135	15,574	16,026
Federal Fund	2,508,498	2,581,244	2,656,100	2,733,127
<b>Total Funds</b>	<b>3,581,878</b>	<b>3,747,492</b>	<b>3,856,169</b>	<b>3,967,998</b>

### Program Description

Program Administration includes the Executive Director's Office responsible for strategic planning and execution of agency programs. The Executive Director's Office directly supports the Governor-appointed Oregon Blind Commission.

Fiscal operations include budget and accounting, all payroll and benefits functions, cash management, receivables, purchasing and payables, and general ledger accounting. Administrative Services also performs all fiscal tasks associated with federal grant management, monitoring and reporting. Information technology and data processing functions including program-related data base functions are also included in this program unit.

### Program Justification

By providing necessary operational and regulatory support to direct service staff, this program programs that create opportunities for Oregonians who experience vision loss to participate in the economy and to live as independently as possible in their homes and communities.

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## **Program Performance**

The Administrative Services Program Unit supports the four direct service program units in meeting their performance goals. The Administrative Services Program Unit seeks to optimize use of available funding streams, maintain compliance with state and federal regulatory requirements, process transactions in a timely manner and accurately, and minimize downtime for systems operations. These goals have been incorporated into the agency's new outcome based management system.

## **Enabling Legislation/Program Authorization**

ORS 346.110 – 346.570 includes statutory authority for administrative activities of the Oregon Commission for the Blind (OCB).

## **Funding Streams**

The program unit budget includes federal grants from U.S. Department of Education's Rehabilitation Services Administration, U. S. Department of Health and Human Services Administration for Community Living , General Fund appropriations, and Other Funds from various sources including cooperative agreements.

## **Changes from 2015-17 Approved Budget**

The Workforce Innovation and Opportunity Act (WIOA) represents the first major reform of the public workforce system in more than 15 years. The agency infrastructure has to expand to address all of the requirements under WIOA. The agency has developed Policy Option Package 101 to provide the necessary infrastructure to respond to the new challenges under WIOA. Direct service support and program monitoring have been consolidated and expanded to support reporting requirements, support to direct service staff and focus on consistent implementation throughout the agency.

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Policy Option Package 103 requests general fund in order to upgrade the agency automated case management system. The agency utilizes an automated case management system to capture federally required data reporting elements and to facilitate the case development and tracking of information of individuals who are participating in agency services in the areas of vocational rehabilitation, independent living and business enterprises. Our current case management system has been in operation for many years and, due to the recent changes that resulted under the passage of the Workforce Innovation and Opportunity Act, the company that has been providing us with the software has determined that it will no longer be offering or maintaining the case management system product after December 2017.

As a result of this change, the agency will be required to convert to a new system. Although the scope of this project will not meet the threshold for a major IT Project, the agency is working with our assigned Strategic Technology Officer with the Office of the Chief Information Officer (CIO) and the Department of Administrative Services Office of Procurement to facilitate the appropriate planning and staging of the project.

# Budget Narrative

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## Program Unit Narrative

### Activities, Programs, and Issues

Program Administration includes the Director's Office responsible for strategic planning and direction, liaison activities with various stakeholders including the vision-impaired community, policymakers, federal officials, partner businesses and social support agencies. The Director's Office directly supports the Governor-appointed Oregon Blind Commission.

Fiscal operations include budget and accounting. All payroll and benefits functions, cash management, receivables, purchasing and payables, and general ledger accounting are the responsibility of Administrative Services. Administrative Services also performs all fiscal tasks associated with federal grant management, monitoring and reporting. Data processing functions including program-related database functions are also included in this program unit.

### Expected Results and Benchmarks

Maintain compliance with all applicable federal and state regulations and policy in areas of responsibility.  
Timely and accurate processing of payments to internal and external customers.  
Accurate and timely processing of payroll and maintenance of employee records.  
Effective budget development and monitoring.  
Accurate and Timely Year-End Financial Reporting.  
Maintain efficient and effective facilities management.

### Revenue Sources and Proposed Changes

See Revenue Forecast Narrative under "Revenues" tab

## Budget Narrative

### Essential and Policy Packages and Fiscal Impact Summary

The current service level through agency request budget showing expenditures by fund type, position and full-time equivalent positions for the Administrative Services Program Unit is displayed in the following table.

	2017-19 Current Service Level	Package 101 WIOA Implementation	Package 103 Case Mgmt. System Migration	2017-19 Agency Request Budget	Package 91-93 Analyst Rec	2017-19 Governor's Budget
General Fund	347,737	714,932	639,788	1,702,457	(643,785)	1,058,672
Other Fund	36,304	(20,704)		15,600	(892)	14,708
Federal Fund	1,268,635	1,153,715		2,422,350	(14,415)	2,508,498
<b>Total Funds</b>	<b>1,652,676</b>	<b>1,847,943</b>	<b>639,788</b>	<b>4,140,407</b>	<b>(659,092)</b>	<b>3,581,878</b>
Positions	6	11	1	18	(1)	17
FTE	6.00	11.00	0.50	17.50	(0.50)	17.00

### *Essential Packages*

#### 010 Non-PICS Personal Services / Vacancy Factor

##### **Package Description**

Provide allowances for non-PICS personal services budget items and to reflect savings from anticipated staff turnover. This package is based on vacancy experience, costs or temporary services and other items.



## Budget Narrative

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Adjustments from base budget total (\$37,324) ((\$29,152) is Federal Funds, (\$7,945) General Fund, (\$227) Other Funds).

### **031 Standard Inflation**

#### **Package Description**

Allows for a general inflation factor that applies to most Services and Supplies and non-PICS Personal Services costs, Capital Outlay and some Special Payments. It also allows inflation at published rates for State Government Service Charges, uniform and non-uniform rent, various assessments and other items. It also includes the standard portion (3.7%) of medical cost increases, non-state employee personnel costs, as applied to Special Payments and usage-based Price List items.

Adjustments from base budget total \$46,462 (\$16,061 Federal Funds, \$29,126 General Fund, and \$1,275 Other Funds).

### **032 Above Standard Inflation**

#### **Package Description**

This package includes the amount above, not including standard inflation, for a limited number of expenditure types. For this program unit, the non-standard inflation relates to professional services.

Adjustments from base budget total \$38,496 (All General Fund).

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## *Policy Packages*

### **101 Workforce Investment and Opportunities Act (WIOA) Implementation**

#### **Related Legislation**

Workforce Innovation and Opportunity Act of 2014.

#### **Purpose**

The Workforce Innovation and Opportunity Act (WIOA), represents the first major reform of the public workforce system in more than 15 years. Achieving WIOA's ambitious goals required significant changes to workforce development programs, including improved collaboration across agencies, workforce boards, employers, and educational institutions; a greater focus on outcomes and efficiency; and better engagement with job seekers and employers. In order to make the necessary changes required under WIOA, the agency infrastructure has to expand to address all of the requirements under WIOA. This POP is designed to enhance the VR program and service delivery system to achieve a higher level of collaboration, partnership, outcomes and opportunities for Oregonians who are blind as expected by WIOA. These positions will create and maintain policy and infrastructure changes needed to support WIOA, provide training to staff, quality assurance, add partnerships, and add employment retention and sustainability to the service delivery model.

#### **Detail Plan**

This policy package would establish the essential infrastructure necessary to respond to the changes under WIOA. Specifically, this policy package would provide the following:

- WIOA Policy Analyst – One Position in Portland
- WIOA Workforce VR Counselors – One position based in Central Oregon and one position in Lane County
- WIOA Technology Specialists – One position based in Central Oregon and one position based in Portland
- Employment First VR Counselor – One position based in Salem
- WIOA Compliance Analyst – One position based in Portland
- Office /Administrative Support – One clerical lead based in Portland
- Rehabilitation Assistant – increase half-time positions statewide to full-time and add two positions in Portland

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Create a Workforce/Employer Engagement Team that would engage the workforce system at both the policy and direct service level.

The WIOA Policy Analyst would be the agency point of contact for workforce system policy and planning issues statewide. This is essential in order for us to participate in the unified planning efforts in the workforce system and to meet the requirements to participate in the development and implementation of the workforce plan for the state.

The agency would expand our capacity to integrate into the workforce system by creating two vocational rehabilitation counselor positions that would be liaisons to the workforce system, businesses and job seekers who are blind. These vocational rehabilitation counselor positions would work in collaboration with two technology teachers that would facilitate the technology training and job site assessments and worksite accommodations as necessary for job seekers who are blind. These positions would also work as a team to provide technical consultation to the workforce system where it is needed. These positions would be co-located with workforce partners in Central Oregon and Lane County.

We would also greatly expand our capacity to offer job site assessment and workplace accommodations with this package. We will be adding additional specialized technology staff that would engage directly with businesses and job sites to assess the accessibility of a jobsite and make specific recommendations for optimizing the accessibility of the work for an individual job seeker who is blind.

Under Governor Brown's leadership there has been a greater emphasis placed on the integrated, competitive employment for individuals with intellectual and developmental disabilities. The Commission for the Blind would hire one specialized counselor that would be based in Salem that would serve as a specialized caseload-carrying Counselor and the central point of contact for other counselors for Employment First.

WIOA places greater emphasis on outcomes and accountability. The new legislation challenges the workforce system to generate greater outcomes for the citizens who receive services. The agency would hire an internal

## Budget Narrative

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auditor that would focus their time on compliance and ensuring that the agency is meeting the requirements for service delivery and financial administration under WIOA.

WIOA challenges the system to offer greater collaboration between partners and their staff. In order to ensure that the staff are maximizing their efforts on the essential functions under WIOA, the agency would add one clerical supervisory position and two new rehabilitation assistant/office specialist positions in Portland and increase the field office rehabilitation assistant positions from half time to full time.

### **How Achieved**

Policy Option Package 101 is funded by the Vocational Rehabilitation Basic 110 grant increase in split for the statewide grant award, increased from 12.5% to 15.6%, the national average for blind agencies. Other funds revenue is projected as part of expansion of third-party cooperative agreements with educational institutions. First, the federal revenue shortfall was funded resulting in restoration of Special Payment for client services. Then, new and expanded positions and associated services and supplies expenditures were funded. Expenditures were adjusted within each program unit as positions were moved to accommodate the new support structure. All expenditure lines were reviewed for appropriate fund splits and adjustments were made between program units. All positions funding splits with PICS were reviewed and adjusted to match current funding streams within each program unit. As a result, the majority of the match requirement for the increase in federal funds was met within the current budget.

Fiscal impact by program unit is as follows:

## Budget Narrative

	GF	OF	FF	TF	Pos.	FTE
<b>Revenue</b>	<b>(350)</b>	<b>259,194</b>	<b>2,536,574</b>	<b>2,795,418</b>		
Administrative Services	714,932	(20,704)	1,153,715	1,847,943	11	11.00
Rehabilitation Services Program	118,399	375,640	1,329,033	1,823,072	1	5.39
Business Enterprise Program	(478,774)	107,142	345,310	(26,322)	-	-
Orientation and Career Center Program	(157,570)	(130,108)	(2,836)	(290,514)	(2)	(1.50)
Independent Living Services Program	(197,337)	-	(288,648)	(485,985)	-	(2.50)
<b>Expenditures</b>	<b>(350)</b>	<b>331,970</b>	<b>2,536,574</b>	<b>2,868,194</b>	<b>10</b>	<b>12.39</b>
<b>Expenditures by Category</b>	<b>GF</b>	<b>OF</b>	<b>FF</b>	<b>TF</b>	<b>Pos.</b>	<b>FTE</b>
Personal Services	44,759	-	1,706,418	1,751,177	10	12.39
Services & Supplies	1,306	(129,138)	381,411	253,579		
Capital Outlay	9,549	-	(9,549)	-		
Special Payments	(55,964)	461,108	458,294	863,438		
<b>Total Expenditures</b>	<b>(350)</b>	<b>331,970</b>	<b>2,536,574</b>	<b>2,868,194</b>	<b>10</b>	<b>12.39</b>

### Staffing Impact

WIOA Compliance Analyst – One position based in Portland

Office /Administrative Support – One clerical lead based in Portland

Rehabilitation Assistant – increase half-time positions statewide to full-time and add two positions in Portland

### 103 Case Management System Migration

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### **Purpose**

The agency utilizes an automated case management system to capture federally required data reporting elements and to facilitate the case development and tracking of information of individuals who are participating in agency services in the areas of vocational rehabilitation, independent living and business enterprises.

Our current case management system has been in operation for many years and, due to the recent changes that resulted under the passage of the Workforce Innovation and Opportunity Act, the company that has been providing us with the software has determined that it will no longer be offering or maintaining the case management system product after December 2017.

As a result of this change, the agency will be required to convert to a new system. Although the scope of this project will not meet the threshold for a major IT Project, the agency is working with our assigned Strategic Technology Officer with the Office of the Chief Information Officer (CIO) and the Department of Administrative Services Office of Procurement to facilitate the appropriate planning and staging of the project.

The agency intends to move forward with a system that is off-the-shelf and is utilized by another state agency that has a long history of success in utilizing the product. This will ensure that there will be a smooth transition for agency staff and customers and will allow the agency the optimal conditions for a successful transition to the new system.

We have developed the total project costs in consultation and partnership with the Strategic Technology Officer assigned to the agency. The total costs include IT professional services that include the assessment/gap analysis, migration of data, software license costs, pilot implementation and project management. The agency is requesting the personal services funds to increase one of our staff from part-time to full-time to be the lead.

## Budget Narrative

This policy package reflects the total projected costs for the changeover, some of which are one-time up front expenditures that would not be continued beyond this budget period. Future budget cycles would see a significant reduction due to shift from up front changeover costs to ongoing maintenance costs.

### How Achieved

The agency is requesting general fund for this one time changeover cost with the limited duration position to support this project.

Expenditures by Category	GF	OF	FF	TF	Pos.	FTE
Personal Services	101,038	-	-	101,038	1	0.50
Services & Supplies	538,750	-	-	538,750		
Capital Outlay	-	-	-	-		
Special Payments	-	-	-	-		
<b>Total Expenditures</b>	<b>639,788</b>	<b>-</b>	<b>-</b>	<b>639,788</b>	<b>1</b>	<b>0.50</b>

### Staffing Impact

Policy Analyst – Limited Duration 0.5 FTE

### Analyst Recommendation – Denied

The Workforce Innovation and Opportunity Act system reporting and tracking requirements will require an upgrade to the agency's case management system. This was not included in the Governor's Budget due to general fund constraints. The agency explored alternatives prior to requesting general fund. Continue with the existing case management system, which will no longer be supported or updated by software provider after December, 2017 – this is a programmatic and security risk to the state and was not considered a viable option. Utilize resources from



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special payments (services to clients) to fund the upgrade – this was not pursued as it would result in a shortfall in resources to serve eligible clients in the VR Program and cause an Order of Selection/wait list to occur. The agency will need to move forward with a plan to finance this required upgrade – which will require the revisiting of the alternatives considered and/or exploring other options.

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Administrative Services  
 Cross Reference Number: 58500-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(7,945)	-	-	-	-	-	(7,945)
Other Revenues	-	-	-	-	-	-	-
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>(\$7,945)</b>	-	-	-	-	-	<b>(\$7,945)</b>
<b>Personal Services</b>							
Overtime Payments	-	-	-	-	-	-	-
All Other Differential	-	-	-	-	-	-	-
Public Employees' Retire Cont	-	-	-	-	-	-	-
Pension Obligation Bond	(992)	-	-	(3,906)	-	-	(4,898)
Social Security Taxes	-	-	-	-	-	-	-
Unemployment Assessments	47	-	-	173	-	-	220
Mass Transit Tax	140	-	(227)	-	-	-	(87)
Vacancy Savings	(7,140)	-	-	(25,419)	-	-	(32,559)
<b>Total Personal Services</b>	<b>(\$7,945)</b>	-	<b>(\$227)</b>	<b>(\$29,152)</b>	-	-	<b>(\$37,324)</b>
<b>Total Expenditures</b>							
Total Expenditures	(7,945)	-	(227)	(29,152)	-	-	(37,324)
<b>Total Expenditures</b>	<b>(\$7,945)</b>	-	<b>(\$227)</b>	<b>(\$29,152)</b>	-	-	<b>(\$37,324)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	227	29,152	-	-	29,379
<b>Total Ending Balance</b>	-	-	<b>\$227</b>	<b>\$29,152</b>	-	-	<b>\$29,379</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Commission for the Blind  
Pkg: 031 - Standard Inflation**

**Cross Reference Name: Administrative Services  
Cross Reference Number: 58500-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	29,126	-	-	-	-	-	29,126
Other Revenues	-	-	-	-	-	-	-
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>\$29,126</b>	-	-	-	-	-	<b>\$29,126</b>

**Services & Supplies**

Instate Travel	-	-	190	358	-	-	548
Out of State Travel	-	-	228	-	-	-	228
Employee Training	-	-	73	256	-	-	329
Office Expenses	-	-	227	1,042	-	-	1,269
Telecommunications	-	-	-	712	-	-	712
State Gov. Service Charges	28,493	-	-	-	-	-	28,493
Data Processing	-	-	49	380	-	-	429
Publicity and Publications	-	-	54	232	-	-	286
Professional Services	-	-	280	3,564	-	-	3,844
IT Professional Services	-	-	-	-	-	-	-
Attorney General	237	-	-	1,295	-	-	1,532
Employee Recruitment and Develop	-	-	12	53	-	-	65
Dues and Subscriptions	-	-	23	313	-	-	336
Facilities Rental and Taxes	337	-	-	5,251	-	-	5,588
Fuels and Utilities	-	-	-	12	-	-	12
Facilities Maintenance	-	-	-	248	-	-	248
Agency Program Related S and S	-	-	8	83	-	-	91
Other Services and Supplies	59	-	41	1,013	-	-	1,113
Expendable Prop 250 - 5000	-	-	90	792	-	-	882

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 031 - Standard Inflation

Cross Reference Name: Administrative Services  
Cross Reference Number: 58500-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
IT Expendable Property	-	-	-	-	-	-	-
<b>Total Services &amp; Supplies</b>	<b>\$29,126</b>	-	<b>\$1,275</b>	<b>\$15,604</b>	-	-	<b>\$46,005</b>
<b>Capital Outlay</b>							
Data Processing Software	-	-	-	-	-	-	-
Data Processing Hardware	-	-	-	-	-	-	-
Other Capital Outlay	-	-	-	457	-	-	457
<b>Total Capital Outlay</b>	-	-	-	<b>\$457</b>	-	-	<b>\$457</b>
<b>Special Payments</b>							
Other Special Payments	-	-	-	-	-	-	-
<b>Total Special Payments</b>	-	-	-	-	-	-	-
<b>Total Expenditures</b>							
Total Expenditures	29,126	-	1,275	16,061	-	-	46,462
<b>Total Expenditures</b>	<b>\$29,126</b>	-	<b>\$1,275</b>	<b>\$16,061</b>	-	-	<b>\$46,462</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(1,275)	(16,061)	-	-	(17,336)
<b>Total Ending Balance</b>	-	-	<b>(\$1,275)</b>	<b>(\$16,061)</b>	-	-	<b>(\$17,336)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 032 - Above Standard Inflation

Cross Reference Name: Administrative Services  
Cross Reference Number: 58500-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	38,496	-	-	-	-	-	38,496
<b>Total Revenues</b>	<b>\$38,496</b>	-	-	-	-	-	<b>\$38,496</b>
<b>Services &amp; Supplies</b>							
Instate Travel	1,335	-	-	-	-	-	1,335
Telecommunications	2,323	-	-	-	-	-	2,323
Data Processing	4,351	-	-	-	-	-	4,351
Other Services and Supplies	30,487	-	-	-	-	-	30,487
<b>Total Services &amp; Supplies</b>	<b>\$38,496</b>	-	-	-	-	-	<b>\$38,496</b>
<b>Total Expenditures</b>							
Total Expenditures	38,496	-	-	-	-	-	38,496
<b>Total Expenditures</b>	<b>\$38,496</b>	-	-	-	-	-	<b>\$38,496</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 091 - Statewide Adjustment DAS Chgs

Cross Reference Name: Administrative Services  
Cross Reference Number: 58500-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(3,863)	-	-	-	-	-	(3,863)
Federal Funds	-	-	-	(13,683)	-	-	(13,683)
<b>Total Revenues</b>	<b>(\$3,863)</b>	-	-	<b>(\$13,683)</b>	-	-	<b>(\$17,546)</b>
<b>Services &amp; Supplies</b>							
State Gov. Service Charges	(2,687)	-	-	(5,327)	-	-	(8,014)
Facilities Rental and Taxes	-	-	(892)	-	-	-	(892)
Other Services and Supplies	(1,176)	-	-	(8,356)	-	-	(9,532)
<b>Total Services &amp; Supplies</b>	<b>(\$3,863)</b>	-	<b>(\$892)</b>	<b>(\$13,683)</b>	-	-	<b>(\$18,438)</b>
<b>Total Expenditures</b>							
Total Expenditures	(3,863)	-	(892)	(13,683)	-	-	(18,438)
<b>Total Expenditures</b>	<b>(\$3,863)</b>	-	<b>(\$892)</b>	<b>(\$13,683)</b>	-	-	<b>(\$18,438)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	892	-	-	-	892
<b>Total Ending Balance</b>	-	-	<b>\$892</b>	-	-	-	<b>\$892</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 092 - Statewide AG Adjustment

Cross Reference Name: Administrative Services  
Cross Reference Number: 58500-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(134)	-	-	-	-	-	(134)
Federal Funds	-	-	-	(732)	-	-	(732)
<b>Total Revenues</b>	<b>(\$134)</b>	<b>-</b>	<b>-</b>	<b>(\$732)</b>	<b>-</b>	<b>-</b>	<b>(\$866)</b>
<b>Services &amp; Supplies</b>							
Attorney General	(134)	-	-	(732)	-	-	(866)
<b>Total Services &amp; Supplies</b>	<b>(\$134)</b>	<b>-</b>	<b>-</b>	<b>(\$732)</b>	<b>-</b>	<b>-</b>	<b>(\$866)</b>
<b>Total Expenditures</b>							
Total Expenditures	(134)	-	-	(732)	-	-	(866)
<b>Total Expenditures</b>	<b>(\$134)</b>	<b>-</b>	<b>-</b>	<b>(\$732)</b>	<b>-</b>	<b>-</b>	<b>(\$866)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Commission for the Blind**  
**Pkg: 101 - WIOA and Employment First**

**Cross Reference Name: Administrative Services**  
**Cross Reference Number: 58500-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All-Funds
<b>Revenues</b>							
General Fund Appropriation	714,932	-	-	-	-	-	714,932
Federal Funds	-	-	-	1,254,278	-	-	1,254,278
<b>Total Revenues</b>	<b>\$714,932</b>	<b>-</b>	<b>-</b>	<b>\$1,254,278</b>	<b>-</b>	<b>-</b>	<b>\$1,969,210</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	342,727	-	-	570,305	-	-	913,032
Empl. Rel. Bd. Assessments	240	-	-	387	-	-	627
Public Employees' Retire Cont	48,371	-	-	84,325	-	-	132,696
Pension Obligation Bond	-	-	-	-	-	-	-
Social Security Taxes	26,218	-	-	43,626	-	-	69,844
Worker's Comp. Assess. (WCD)	293	-	-	466	-	-	759
Mass Transit Tax	2,076	-	-	-	-	-	2,076
Flexible Benefits	142,877	-	-	223,819	-	-	366,696
<b>Total Personal Services</b>	<b>\$562,802</b>	<b>-</b>	<b>-</b>	<b>\$922,928</b>	<b>-</b>	<b>-</b>	<b>\$1,485,730</b>
<b>Services &amp; Supplies</b>							
Instate Travel	17,458	-	(5,330)	38,148	-	-	50,276
Out of State Travel	4,548	-	(6,377)	10,181	-	-	8,352
Employee Training	6,137	-	(2,037)	8,214	-	-	12,314
Office Expenses	18,167	-	(6,352)	(13,639)	-	-	(1,824)
Telecommunications	13,560	-	-	16,957	-	-	30,517
State Gov. Service Charges	(16,330)	-	(72)	232	-	-	(16,170)
Data Processing	4,133	-	(1,377)	8,392	-	-	11,148
Publicity and Publications	1,704	-	(1,507)	(197)	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 101 - WIOA and Employment First

Cross Reference Name: Administrative Services  
Cross Reference Number: 58500-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Professional Services	10,288	-	(7,104)	(53,184)	-	-	(50,000)
IT Professional Services	25,200	-	-	94,800	-	-	120,000
Attorney General	766	-	-	(766)	-	-	-
Employee Recruitment and Develop	385	-	(330)	(55)	-	-	-
Dues and Subscriptions	2,008	-	(651)	(1,357)	-	-	-
Facilities Rental and Taxes	58,705	-	14,338	84,024	-	-	157,067
Fuels and Utilities	545	-	-	1,702	-	-	2,247
Facilities Maintenance	995	-	-	(3,307)	-	-	(2,312)
Agency Program Related S and S	544	-	(237)	(307)	-	-	-
Other Services and Supplies	(23,893)	-	(1,147)	5,694	-	-	(19,346)
Expendable Prop 250 - 5000	8,981	-	(2,521)	4,193	-	-	10,653
IT Expendable Property	8,680	-	-	11,462	-	-	20,142
<b>Total Services &amp; Supplies</b>	<b>\$142,581</b>	<b>-</b>	<b>(\$20,704)</b>	<b>\$211,187</b>	<b>-</b>	<b>-</b>	<b>\$333,064</b>
<b>Capital Outlay</b>							
Office Furniture and Fixtures	1,688	-	-	5,525	-	-	7,213
Technical Equipment	5,133	-	-	16,803	-	-	21,936
Other Capital Outlay	2,728	-	-	(2,728)	-	-	-
<b>Total Capital Outlay</b>	<b>\$9,549</b>	<b>-</b>	<b>-</b>	<b>\$19,600</b>	<b>-</b>	<b>-</b>	<b>\$29,149</b>
<b>Total Expenditures</b>							
Total Expenditures	714,932	-	(20,704)	1,153,715	-	-	1,847,943
<b>Total Expenditures</b>	<b>\$714,932</b>	<b>-</b>	<b>(\$20,704)</b>	<b>\$1,153,715</b>	<b>-</b>	<b>-</b>	<b>\$1,847,943</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 101 - WIOA and Employment First

Cross Reference Name: Administrative Services  
 Cross Reference Number: 58500-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Ending Balance</b>							
Ending Balance	-	-	20,704	100,563	-	-	121,267
<b>Total Ending Balance</b>	-	-	<b>\$20,704</b>	<b>\$100,563</b>	-	-	<b>\$121,267</b>
<b>Total Positions</b>							
Total Positions							11
<b>Total Positions</b>	-	-	-	-	-	-	<b>11</b>
<b>Total FTE</b>							
Total FTE							11.00
<b>Total FTE</b>	-	-	-	-	-	-	<b>11.00</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Commission for the Blind**  
**Pkg: 103 - Case Management System Migration**

**Cross Reference Name: Administrative Services**  
**Cross Reference Number: 58500-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	-	-	-	-	-	-	-
<b>Total Revenues</b>	-	-	-	-	-	-	-
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	-	-	-	-	-	-	-
Empl. Rel. Bd. Assessments	-	-	-	-	-	-	-
Public Employees' Retire Cont	-	-	-	-	-	-	-
Social Security Taxes	-	-	-	-	-	-	-
Worker's Comp. Assess. (WCD)	-	-	-	-	-	-	-
Mass Transit Tax	-	-	-	-	-	-	-
Flexible Benefits	-	-	-	-	-	-	-
<b>Total Personal Services</b>	-	-	-	-	-	-	-
<b>Services &amp; Supplies</b>							
IT Professional Services	-	-	-	-	-	-	-
<b>Total Services &amp; Supplies</b>	-	-	-	-	-	-	-
<b>Total Expenditures</b>							
Total Expenditures	-	-	-	-	-	-	-
<b>Total Expenditures</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 103 - Case Management System Migration

Cross Reference Name: Administrative Services  
 Cross Reference Number: 58500-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-
<b>Total Positions</b>							
Total Positions							-
<b>Total Positions</b>	-	-	-	-	-	-	-
<b>Total FTE</b>							
Total FTE							-
<b>Total FTE</b>	-	-	-	-	-	-	-

01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:001-00-00 Administrative Services

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

2017-19  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 101 - WIOA and Employment First

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0008002	OAS C0104 AP	OFFICE SPECIALIST 2	1	1.00	24.00	09	3,669.00	36,103 21,207		51,953 30,517		88,056 51,724
0009002	OAS C0104 AP	OFFICE SPECIALIST 2	1	1.00	24.00	02	2,716.00	26,725 19,261		38,459 27,719		65,184 46,980
0009004	OAS C0104 AP	OFFICE SPECIALIST 2	1	1.00	24.00	09	3,669.00	36,103 21,207		51,953 30,517		88,056 51,724
0009007	OAS C0104 AP	OFFICE SPECIALIST 2	1	1.00	24.00	09	3,669.00	36,094 21,201		51,962 30,523		88,056 51,724
0009008	OAS C0104 AP	OFFICE SPECIALIST 2	1	1.00	24.00	02	2,716.00	26,725 19,261		38,459 27,719		65,184 46,980
0108001	MMS X7006 AA	PRINCIPAL EXECUTIVE/MANAGER D	1-	1.00-	24.00-	06	6,673.00	38,436- 18,310-		121,716- 57,977-		160,152- 76,287-
0108001	MMS X7006 AA	PRINCIPAL EXECUTIVE/MANAGER D	1	1.00	24.00	06	6,673.00	34,112 16,250		126,040 60,037		160,152 76,287
0507001	OAS C0104 AP	OFFICE SPECIALIST 2	1	1.00	24.00	07	3,347.00	32,934 20,549		47,394 29,573		80,328 50,122
0800007	OAS C0104 AP	OFFICE SPECIALIST 2	1	1.00	24.00	09	3,669.00	36,103 21,207		51,953 30,517		88,056 51,724
1719001	MENNZ5618 AA	INTERNAL AUDITOR 3	1	1.00	24.00	02	5,770.00	29,496 15,016		108,984 55,476		138,480 70,492
1719002	MMS X0806 AA	OFFICE MANAGER 2	1	1.00	24.00	02	3,386.00	33,318 22,628		47,946 32,564		81,264 55,192
1719003	OAS C0104 AP	OFFICE SPECIALIST 2	1	1.00	24.00	02	2,716.00	26,725 19,261		38,459 27,719		65,184 46,980
1719004	OAS C0104 AP	OFFICE SPECIALIST 2	1	1.00	24.00	02	2,716.00	26,725 19,261		38,459 27,719		65,184 46,980
TOTAL PICS SALARY								342,727		570,305		913,032
TOTAL PICS OPE								217,999		352,623		570,622
TOTAL PICS PERSONAL SERVICES =			11	11.00	264.00			560,726		922,928		1,483,654

**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

Commission for the Blind  
2017-19 Biennium

Agency Number: 58500  
Cross Reference Number: 58500-001-00-00-00000

<i>Source</i>	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
<b>Other Funds</b>						
Interest Income	-	1,200	1,200	-	-	-
Sales Income	5,148	15,600	15,600	15,600	15,600	-
Donations	-	59,562	59,562	-	-	-
Other Revenues	25,814	37,601	35,717	-	-	-
Transfer In - Intrafund	202,673	-	-	-	-	-
Transfer Out - Intrafund	(512,000)	-	-	-	-	-
<b>Total Other Funds</b>	<b>(\$278,365)</b>	<b>\$113,963</b>	<b>\$112,079</b>	<b>\$15,600</b>	<b>\$15,600</b>	<b>-</b>
<b>Federal Funds</b>						
Federal Funds	1,230,375	1,462,817	1,506,259	2,522,913	2,508,498	-
<b>Total Federal Funds</b>	<b>\$1,230,375</b>	<b>\$1,462,817</b>	<b>\$1,506,259</b>	<b>\$2,522,913</b>	<b>\$2,508,498</b>	<b>-</b>

# DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Source	Fund	ORBITS Revenue Acct	2013-2015 Actual	2015-17 Legislatively Adopted	2015-17 Estimated	2017-19		
						Agency Request	Governor's	Legislatively Adopted
<u>Administrative Services</u>								
<u>58500-001-00-00-00000</u>								
Charges for Services	OF	0410	0	0	0	0	0	
Interest Income	OF	0605	0	1,200	1,200	0	0	
Sales Income	OF	0705	5,148	15,600	15,600	15,600	15,600	
Donations	OF	0905	0	59,562	59,562	0	0	
Other Revenue	OF	0975	25,814	37,601	35,717	0	0	
Transfers In – Intrafund	OF	1010	202,673	0	0	0	0	
Transfers Out – Intrafund	OF	2010	(512,000)	0	0	0	0	
<b>TOTAL OTHER FUNDS</b>			<b>(278,365)</b>	<b>113,963</b>	<b>112,079</b>	<b>15,600</b>	<b>15,600</b>	
Federal Funds	FF	0995	1,230,375	1,462,817	1,506,259	2,522,913	2,508,498	
<b>TOTAL FEDERAL FUNDS</b>			<b>1,230,375</b>	<b>1,462,817</b>	<b>1,506,259</b>	<b>2,522,913</b>	<b>2,508,498</b>	

\_\_\_\_\_ Agency Request
  X   Governor's Budget
\_\_\_\_\_ Legislatively Adopted
Budget Page \_\_\_\_\_

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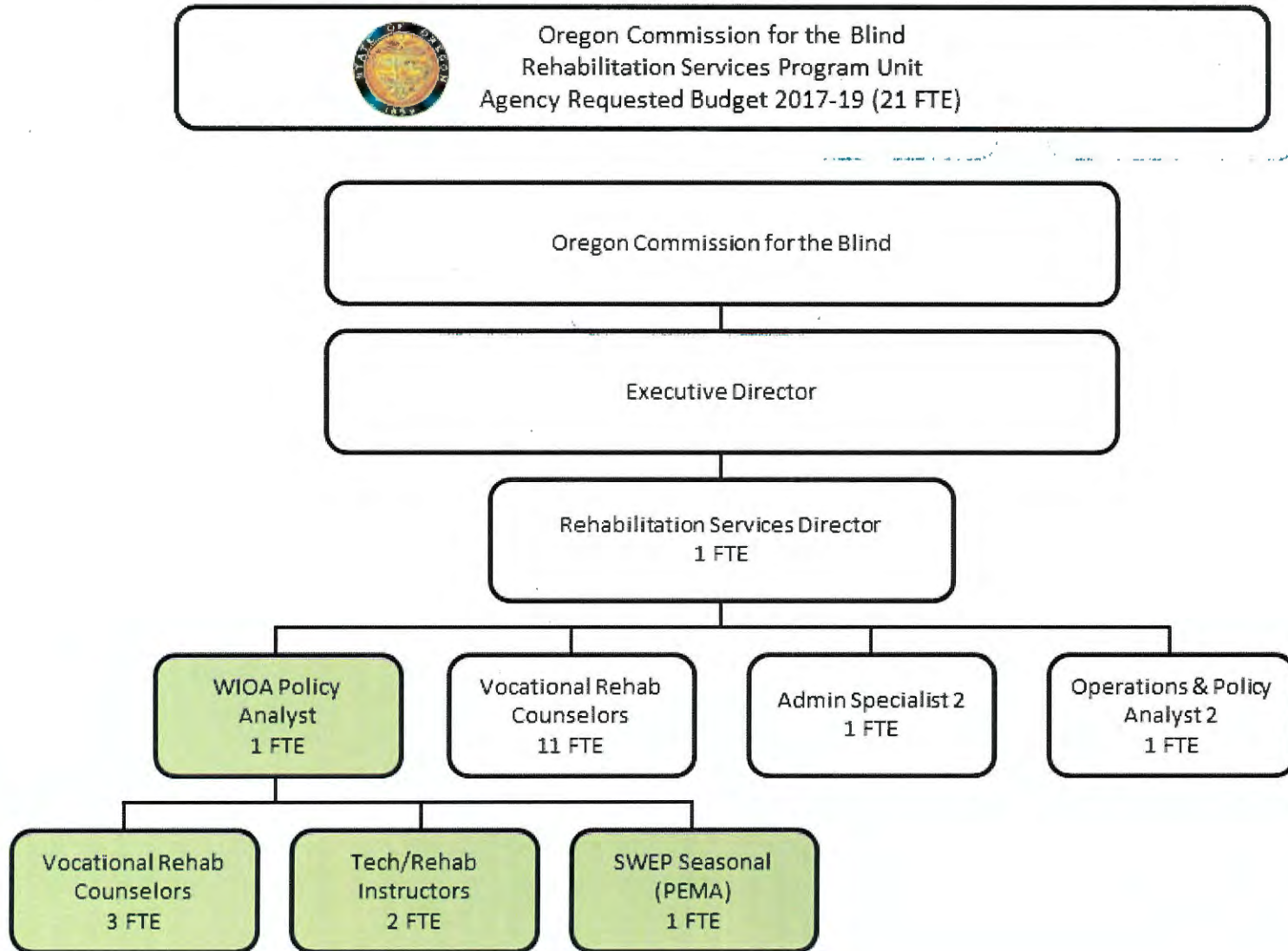


# Budget Narrative

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## REHABILITATION SERVICES

# Budget Narrative

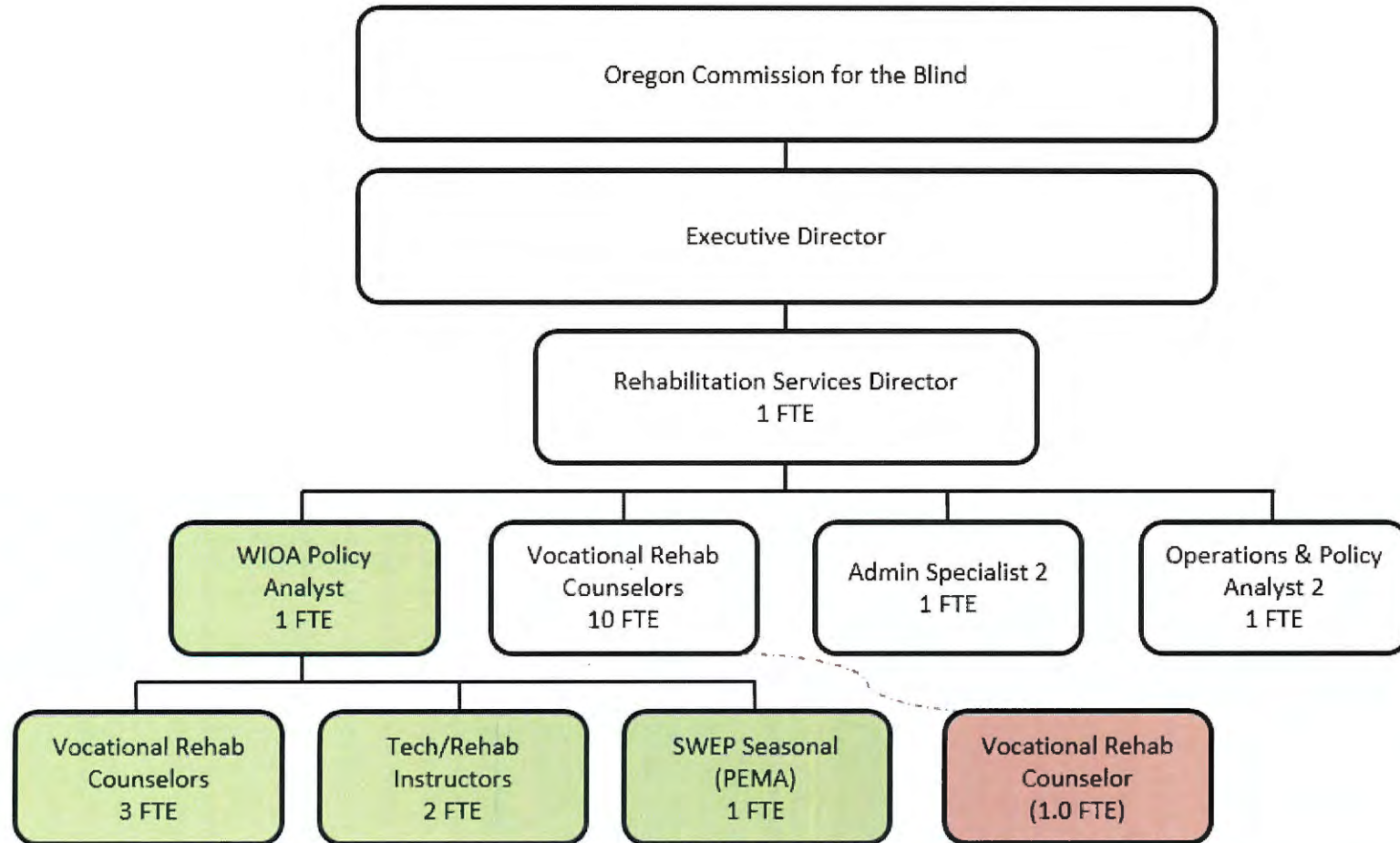


\* POP 101 WIOA

# Budget Narrative



Oregon Commission for the Blind  
Rehabilitation Services Program Unit  
Governor's Budget 2017-19 (20 FTE)



\* POP 101 WIOA

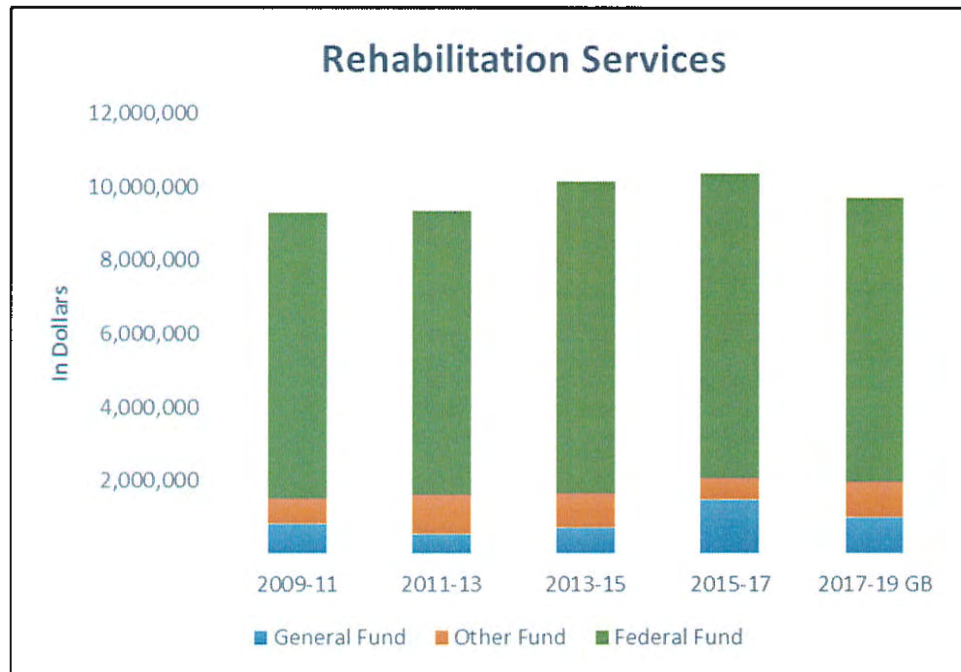
\* Not Included in Governor's Budget

# Budget Narrative

## Rehabilitation Services Program Unit Executive Summary

Program Contact:

Angel Hale, 971-673-1588  
angel.hale@state.or.us



# Budget Narrative

## Program Overview

The Rehabilitation Services Program of the Commission for the Blind is an essential aspect of the economic vitality of Oregon. The program has a direct impact on the development of Oregon's work-ready communities by providing individuals with vision loss the opportunity to prepare for, gain and retain employment. This has a direct and positive impact on our clients' ability to live independent and productive lives. Oregonians who experience vision loss are at risk of being dependent on social services and economic supports. However, like all citizens, persons with vision loss want and deserve the opportunity to work and be involved in their communities. When citizens of this state experiences vision loss, they need access to information and training from specialized professionals. These highly skilled professionals are available at the Oregon Commission for the Blind. Vocational Rehabilitation Counseling (via the Vocational Rehabilitation Program) and Rehabilitation Instruction (via the Orientation and Career Center for the Blind and Field Teachers) are provided by the agency so that individuals with vision loss can get the guidance and training they need to be independent, self-sufficient and meaningfully employed.

## Program Funding Request

The Requested Budget for the Rehabilitation Services Program Unit, with corresponding performance projections, is summarized below. Projections for 2017-19 and beyond include additional direct service as described in Policy Option Package 101.

	<b>2017-19 GB</b>	<b>2019-21</b>	<b>2021-2023</b>	<b>2023-25</b>
General Fund	987,881	1,016,530	1,046,009	1,076,343
Other Fund	986,452	1,015,059	1,044,496	1,074,786
Federal Fund	7,727,505	7,951,603	8,182,199	8,419,483
Total Funds	9,701,838	9,983,192	10,272,704	10,570,612

# Budget Narrative

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## Program Description

The Rehabilitation Services program is a specialized partner in the overall workforce system to ensure that job seekers who are blind and businesses who are seeking qualified candidates are able to meet their job search and talent acquisition goals. The Commission for the Blind provides highly specialized and individualized vocational rehabilitation services to Oregonians that experience blindness throughout the state. The Commission is the only resource in Oregon for adults with vision loss who require rehabilitation interventions in order prepare for and engage in competitive employment. The Rehabilitation Services program at the Commission provides a continuum of services that begins with youth who experience blindness transitioning out of the school system and continues throughout the work span.

The Rehabilitation Services Program is the Commission for the Blind's largest program. Its primary function is to develop and support Oregonians with vision loss towards their full potential as taxpayers and citizens who are contributing to the diversity and livability of their communities. Individuals who come to the agency seeking assistance with employment obtain an eligibility determination, comprehensive assessment and individualized planning that is focused on meeting their specific employment goals. This plan is executed through counseling, skills training, the provision of accessible equipment/tools and proactive and effective job accommodations. Individuals in the vocational rehabilitation program are regularly referred to the Orientation and Career Center for the Blind program within the agency for specific adaptive and vocational skills training, technology training, and other blindness related skills training that are critical to each client's ability to fully implement their individualized plan for employment.

Our referral sources/partners in the rehabilitation process are as follows:

Education Partners – coordinate services and refer youth preparing to exit high school to begin to focus on planning for a smooth transition to work and life after high school. Rehabilitation Services works with the school system to provide consultation and seamless transition services upon graduation/exit from high school to post-secondary education and employment.



## Budget Narrative

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Other State/Government Programs – individuals seeking supports or accessing other public agency services who would benefit from services from our agency are referred to us for training and support to maximize their employment opportunities. We also refer out to these partner agencies in cases where our clients need additional non-blindness related services not available through the Commission.

Medical Providers – As providers throughout the state discover and inform individuals about their visual conditions (often a very sensitive/emotional time for those with new vision loss), they also refer these clients to the agency for support in maintaining their employment or returning to the workforce.

### **Cost Drivers**

Technology Training and Devices - One of the largest expenses in the vocational rehabilitation program is associated with technology and adaptive equipment. With advances in technology, many more jobs become possible to perform without vision. Over 70% of individuals served in the vocational rehabilitation program receive some form of technology services.

### **Program Justification**

The Rehabilitation Services Program is directly aligned with the following priorities established by Governor Brown:

#### ***A Seamless System of Education and Workforce Training***

As transition-aged youth who are blind prepare to exit high school, our Transition Specialists work with the student, their families and education planning team to develop a seamless transition into further post-secondary training and/or employment. Oregonians who are blind work with the Commission for the Blind's specialized vocational rehabilitation counseling and teaching professionals to build and implement

## Budget Narrative

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individualized plans for employment consistent with their unique strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice.

### ***A Thriving Statewide Economy for all Oregonians***

Vocational rehabilitation at the Commission for the Blind is about helping individuals who are blind and want to gain or retain employment to acquire the necessary adaptive skills for full participation in the workforce. In order for Oregonians who are blind to fully participate in the economic recovery, they need access to training, technology and other related vocational rehabilitation services. It is also critical that there be employers who want to hire qualified individuals with disabilities in order to enhance and diversify their workforce. We are committed to being an agency that leads by example and have many employees who are blind who are working at all levels of the organization.

This program helps job seekers who are blind acquire the skills they need in order to support themselves and their families and ensures that Oregonians who are blind can fully participate in the economy in our state. Our specialized workforce program focuses on ensuring individuals who are blind can work by providing the specialized training, education, technology and job search assistance essential to ensure that Oregonians who are blind can benefit from working and contributing to their communities. The program creates opportunities for Oregonians and reduces the disparity of earnings and economic dependence experienced by individuals with disabilities.

### **Return on Investment**

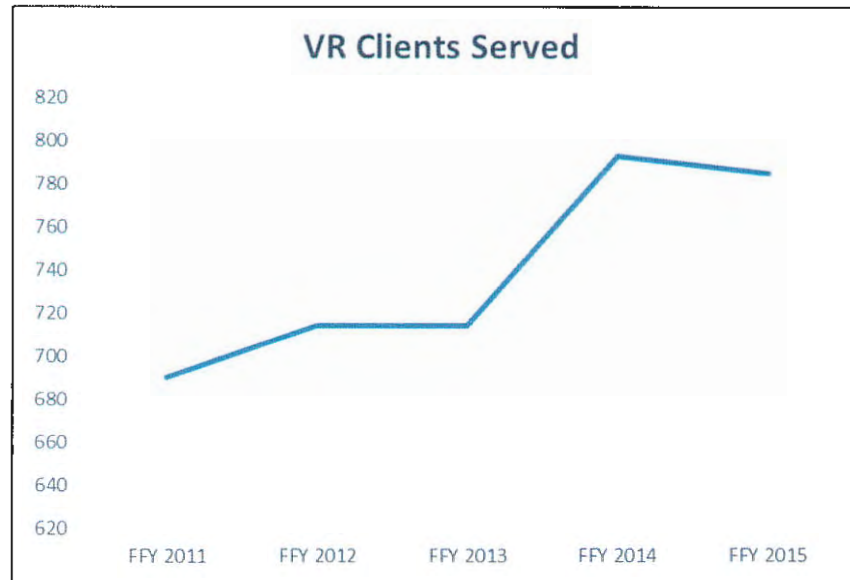
Rehabilitation Services are not only an investment, but they are an opportunity for individuals to fully participate in society contributing to the economy of the state. In 2015, 75% of the individuals in the vocational rehabilitation program who entered into a plan for employment were successful in reaching their goals. For an average cost of \$3,224, individuals who experience vision loss and returned to work had combined earnings totaling \$1.33 million.



## Budget Narrative

That is \$1.33 million reinvested in our local economies. As tax payers, individuals on average pay back the state contribution of their rehabilitation program in 11.5 months.

### Program Performance



	FFY 2011	FFY 2012	FFY 2013	FFY 2014	FFY 2015
VR Clients Served	690	714	714	793	785
Average Hourly Wage at Closure	\$17.30	\$17.91	\$31.81	\$24.50	\$16.77
Employment Outcomes	100	101	63	79	129
Client Satisfaction	95.7%	100.0%	90.9%	95.3%	91.9%
Services Timeliness Rating	97.1%	100.0%	84.5%	90.4%	89.8%
Cost per Client	\$2,635	\$1,844	\$1,973	\$1,808	\$1,910

# Budget Narrative

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## **Enabling Legislation/Program Authorization**

This program is authorized by Federal Law establishing vocational rehabilitation programs specializing in serving individuals who are blind. The Workforce Innovation and Opportunity Act of 2014, PL 113-128 and ORS 346.110-346.250.

## **Funding Streams**

Oregon Commission for the Blind is funded through the U. S. Department of Education. It is a formula-based budget with matching and maintenance of effort requirements. The federal law outlines that the funds are protected for the sole purpose of the designated state agency with an approved state plan to administer services under federal law.

The agency receives the majority of its resources from the Federal Rehabilitation Services Administration of the U. S. Department of Education that require a state/other match contribution. The match rate for the vocational rehabilitation program is essentially 4:1 federal to state/other dollars.

## **Changes from 2015-17 Approved Budget**

Under the Workforce Innovation and Opportunity Act, Congress placed an emphasis on competitive, integrated employment, which provided a distinction between vocational rehabilitation, and independent living services that do not result in an employment outcome. In response to this change, Rehabilitation Services and Independent Living Services have been separated out into two distinct programs in the agency request budget.

The Workforce Innovation and Opportunity Act (WIOA), represents the first major reform of the public workforce system in more than 15 years. Achieving WIOA's ambitious goals requires significant changes to workforce development programs, including improved collaboration across agencies, workforce boards, employers, and educational institutions; a greater focus on outcomes and efficiency; and better engagement with job seekers and

## Budget Narrative

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employers. In order to make the necessary changes required under WIOA, the agency infrastructure has to expand to address all of the requirements under WIOA. The agency has developed Policy Option Package 101 to provide the necessary infrastructure to respond to the new challenges and requirements under WIOA.

The Commission for the Blind has implemented the use of shared/centralized human resources services through the Department of Administrative Services Chief Human Resources Office as a means to ensure effective and efficient business practices in the administration of human resources for the agency. In consultation with the agency Chief Human Resource Office HR Client Manager, the agency learned two of the agency positions that have been classified traditionally as temporary employees are more appropriately classified as seasonal employees based on the type of work that occurs, the timing and duration. Policy Option Package 102 requests a shift in resources from client special payments to personal services and adds two part-time seasonal positions, one seasonal FTE.

# Budget Narrative

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## Program Unit Narrative

### Activities, Programs, and Issues

The Rehabilitative Services program provides comprehensive, goal-oriented services to Oregonians who are blind (and those who experience other disabilities in addition to blindness) to maximize their independence in their communities through work and independent living skills. Clients are assisted in identifying barriers to full participation in society through individualized plans developed to overcome these barriers and reach their goals. There are two parts to this department: vocational rehabilitation and independent living.

The Vocational Rehabilitation Program is the focal point of services provided by the agency. The program provides services through a state-federal partnership as outlined in the Workforce Innovation and Opportunity Act. The program maximizes the capabilities of individuals who are blind who are interested in and able to obtain and maintain employment. In partnership with their Vocational Rehabilitation Counselor, clients identify barriers to employment and develop individualized plans to achieve their employment goals. During the Vocational Rehabilitation process, individuals experience self-determination and empowerment.

Businesses participate in the program either by retaining an employee who is experiencing increased vision loss or by hiring an employee who is legally blind. The employer, the client, and the counselor work together to access the necessary technology, identify the appropriate training, and transition into employment.

### Vocational Rehabilitation Services for Clients

- **Professional counseling** to assist consumers in adjusting to blindness, exploring vocational opportunities, becoming work ready, and assessing/training in independent living skills.
- **Evaluation** of vocational strengths and challenges. Recommendations for adaptive techniques and equipment based on visual acuity and individual needs.

## Budget Narrative

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- **Training** for those who, because of their disability, need additional education to either retain or enter a career.
- **Adaptive technology** assessment and training for use in attaining the client's career goal (retaining or obtaining employment). Coordination of resources to secure identified technologies/equipment for clients.
- **Job development** and employment acquisition. The counselor and client work closely together in researching employment opportunities, identifying prospective employers and securing employment.
- **Job retention** is an outcome of the success of the vocational rehabilitation plan. If the client has been placed in a new job as a result of their individual vocational plan, the counselor follows up with the client and the employer to work through any initial issues on the job. If the client's goal is to maintain an existing job which may be changing because of additional vision loss or requiring new technology, the counselor works with the client and employer to address these needs and keep them in their current position.

The Oregon Commission for the Blind also provides other services necessary for each client to achieve their vocational goals.

### Services to Businesses

- **Assessment:** A rehabilitation professional can review the work site to evaluate an existing employee's working conditions or potential barriers an employee who is visually impaired may experience. The professional would then provide recommendations for the employee and employer to optimize the employee's productivity.
- **Americans with Disabilities Act (ADA) Training:** Commission for the Blind professionals provide ADA and other blindness-specific trainings for public, private and non-profit businesses throughout Oregon. These trainings are designed to familiarize managers and staff with the different forms and degrees of blindness. These

## Budget Narrative

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workshops also teach participants practical and innovative ways to maximize the accessibility of workplaces, homes and other environments for individuals who experience vision loss.

- **Qualified applicants:** The Commission for the Blind is a resource for applicants who are trained and ready-to-work. The rehabilitation process ensures that the client and employer will have access to tools and assistance prior to employment, during the interview process and post-employment (should the need arise).
- **Retention of Valued Employees:** Current employees whose decreasing vision is affecting their productivity can apply for services. By working with the employer and the client, OCB can make recommendations, provide expertise and purchase or recommend helpful technologies to overcome identified barriers. This allows employers to retain trained and productive employees.

The Oregon Commission for the Blind can also provide other uniquely tailored services to the employer which are needed to achieve the individual's vocational goal.

### Revenue Sources and Proposed Changes

See Revenue Forecast Narrative under "Revenues" tab.

## Budget Narrative

### Essential and Policy Packages and Fiscal Impact Summary

The current service level through agency request budget showing expenditures by fund type, position and full-time equivalent positions for the Rehabilitation Services Program Unit is displayed in the following table.

	2017-19 Current Service Level	Package 070 Revenue Shortfall	Package 101 WIOA Implementation	Package 102 Summer Work Experience Seasonal Staff	2017-19 Agency Request Budget	Package 91-93 Analyst Rec	2017-19 Governor's Budget
General Fund	915,920	-	118,399	-	1,034,319	(46,438)	987,881
Other Fund	620,001	-	375,640	-	995,641	(9,189)	986,452
Federal Fund	7,091,517	(608,384)	1,329,033	-	7,812,166	(84,661)	7,727,505
<b>Total Funds</b>	<b>8,627,438</b>	<b>(608,384)</b>	<b>1,823,072</b>	<b>-</b>	<b>9,842,126</b>	<b>(140,288)</b>	<b>9,701,838</b>
Positions	19	-	1	2	22	(1)	21
FTE	17.11	-	5.39	1.00	23.50	(1.00)	22.50

### *Essential Packages*

#### 010 Non-PICS Personal Services / Vacancy Factor

##### Package Description

Provide allowances for non-PICS personal services budget items and to reflect savings from anticipated staff turnover. This package is based on vacancy experience, costs or temporary services and other items.

Adjustments from base budget total (\$99,411) ((\$70,509) Federal Funds, (\$30,632) General Fund, and \$1,730 Other Funds).

## Budget Narrative

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### **031 Standard Inflation**

#### **Package Description**

Allows for a general inflation factor that applies to most Services and Supplies and non-PICS Personal Services costs, Capital Outlay and some Special Payments. It also allows inflation at published rates for State Government Service Charges, uniform and non-uniform rent, various assessments and other items. It also includes the standard portion (3.7%) of medical cost increases, non-state employee personnel costs, as applied to Special Payments and usage-based Price List items.

Adjustments from base budget total \$226,217 (\$174,743 Federal Funds, \$24,590 General Fund, and \$26,884 Other Funds).

### **032 Above Standard Inflation**

#### **Package Description**

This package includes the amount above, not including standard inflation, for a limited number of expenditure types. For this program unit, the non-standard inflation relates to professional services.

Adjustments from base budget total \$57,575 (All General Fund).

### **060 Independent Services Separate Detailed Cross-Reference**

#### **Package Description**

This package includes the transfer of services and supplies expenditures to a separate detailed cross-reference for the Independent Living (IL) Services Program Unit. The positions were moved as part of 2017-19 base budget. IL



## Budget Narrative

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is funded by separate federal grants and staff work with a separate group of clients. While clients can span between these two programs, the services provided within the IL Program are for clients not returning to the workforce. Federal grant match percentages differ as well. This separation allows for an improvement in tracking the financial status of each program.

Adjustments from base budget total (\$322,999) ((\$270,901) Federal Funds and (\$52,098) General Fund)

### *Policy Packages*

#### **070 Revenue Shortfalls**

##### **Package Description**

The Vocational Rehabilitation federal grant is a capped grant, and the funds are awarded by state level. The Commission for the Blind and the general agency Vocational Rehabilitation within the Department of Human Services split the statewide grant. The Commission for the Blind currently receives 12.5% of the VR grant. Having been at this split percentage for many years, expenditures are now projected to exceed federal revenue.

##### **How Achieved**

Special Payments (Vocational Rehabilitation program client service payment) will be cut by approximately \$609,000. Major components of programs, such as SWEP program for youth transitioning from high school, would likely be eliminated.

Total reductions for this program unit is \$608,384 Federal Funds.

##### **Staffing Impact**

There is no staffing impact.

# Budget Narrative

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## 101 Workforce Investment and Opportunities Act (WIOA) Implementation

### Related Legislation

Workforce Innovation and Opportunity Act of 2014.

### Purpose

The Workforce Innovation and Opportunity Act (WIOA), represents the first major reform of the public workforce system in more than 15 years. Achieving WIOA's ambitious goals requires significant changes to workforce development programs, including improved collaboration across agencies, workforce boards, employers, and educational institutions; a greater focus on outcomes and efficiency; and better engagement with job seekers and employers. In order to make the necessary changes required under WIOA, the agency infrastructure has to expand to address all of the requirements under WIOA. This POP is designed to enhance the VR program and service delivery system to achieve a higher level of collaboration, partnership, outcomes and opportunities for Oregonians who are blind as expected by WIOA. These positions will create and maintain policy and infrastructure changes needed to support WIOA, provide training to staff, quality assurance, add partnerships, and add employment retention and sustainability to the service delivery model.

### Detail Plan

This policy package would establish the essential infrastructure necessary to respond to the changed under WIOA. Specifically, this policy package would provide the following:

- WIOA Policy Analyst – One Position in Portland
- WIOA Workforce VR Counselors – One position based in Central Oregon and one position in Lane County
- WIOA Technology Specialists – One position based in Central Oregon and one position based in Portland
- Employment First VR Counselor – One position based in Salem
- WIOA Compliance Analyst – One position based in Portland
- Office /Administrative Support – One clerical lead based in Portland
- Rehabilitation Assistant – increase half time positions statewide to full time and add two positions in Portland

## Budget Narrative

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Create a Workforce/Employer Engagement Team that would engage the workforce system at both the policy and direct service level.

The WIOA Policy Analyst would be the agency point of contact for workforce system policy and planning issues statewide. This is essential in order for us to participate in the unified planning efforts in the workforce system and to meet the requirements to participate in the development and implementation of the workforce plan for the state.

The agency would expand our capacity to integrate within the workforce system by creating two vocational rehabilitation counselor positions that would be liaisons to the workforce system, businesses and job seekers who are blind. These vocational rehabilitation counselor positions would work in collaboration with two technology teachers that would facilitate the technology training and job site assessments and work site accommodations as necessary for job seekers who are blind. These positions would also work as a team to provide technical consultation to the workforce system where it is applicable to ensure job seekers. These positions would be co-located with workforce partners in Central Oregon and Lane County.

We would also greatly expand our capacity to offer job site assessment and workplace accommodations with this package. We will be adding additional specialized technology staff that would engage directly with businesses and job sites to assess the accessibility of a jobsite and make specific recommendations for optimizing the accessibility of the work area for an individual job seeker who is blind.

Under Governor Brown's leadership there has been a greater emphasis placed on the integrated, competitive employment for individuals with intellectual and developmental disabilities. The Commission for the Blind would hire one specialized counselor that would be based in Salem that would serve as a specialized caseload-carrying Counselor and the central point of contact for other counselors for Employment First.

WIOA places greater emphasis on outcomes and accountability. The new legislation challenges the workforce system to generate better outcomes for the citizens who receive services. The agency would hire an internal auditor

## Budget Narrative

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that would focus their time on compliance and ensuring that the agency is meeting the requirements for service delivery and financial administration under WIOA.

WIOA challenges the system to offer stronger collaboration between partners and their staff. In order to ensure that the staff are maximizing their efforts on the essential functions under WIOA, the agency would add one clerical supervisory position and two new rehabilitation assistant/office specialist positions in Portland and increase the field office rehabilitation assistant positions from half time to full time.

### **How Achieved**

Policy Option Package 101 is funded by the Vocational Rehabilitation Basic 110 grant increase in split for the statewide grant award, increased from 12.5% to 15.6%, the national average for blind agencies. Other funds revenue is projected as part of expansion of third-party cooperative agreements with educational institutions. First, the federal revenue shortfall is funded resulting in restoration of Special Payment for client services. Then, new and expanded positions and associated services and supplies expenditures were funded. Expenditures were adjusted within each program unit as positions were moved to accommodate the new support structure. All expenditure lines were reviewed for appropriate fund splits and adjustments were made between program units. All positions funding splits with PICS were reviewed and adjusted to match current funding streams within each program unit. As a result, the majority of the match requirement for the increase in federal funds was met within the current budget.

Fiscal impact by program unit is as follows:

## Budget Narrative

	GF	OF	FF	TF	Pos.	FTE
<b>Revenue</b>	<b>(350)</b>	<b>259,194</b>	<b>2,536,574</b>	<b>2,795,418</b>		
Administrative Services	714,932	(20,704)	1,153,715	1,847,943	11	11.00
Rehabilitation Services Program	118,399	375,640	1,329,033	1,823,072	1	5.39
Business Enterprise Program	(478,774)	107,142	345,310	(26,322)	-	-
Orientation and Career Center Program	(157,570)	(130,108)	(2,836)	(290,514)	(2)	(1.50)
Independent Living Services Program	(197,337)	-	(288,648)	(485,985)	-	(2.50)
<b>Expenditures</b>	<b>(350)</b>	<b>331,970</b>	<b>2,536,574</b>	<b>2,868,194</b>	<b>10</b>	<b>12.39</b>
<b>Expenditures by Category</b>	<b>GF</b>	<b>OF</b>	<b>FF</b>	<b>TF</b>	<b>Pos.</b>	<b>FTE</b>
Personal Services	44,759	-	1,706,418	1,751,177	10	12.39
Services & Supplies	1,306	(129,138)	381,411	253,579		
Capital Outlay	9,549	-	(9,549)	-		
Special Payments	(55,964)	461,108	458,294	863,438		
<b>Total Expenditures</b>	<b>(350)</b>	<b>331,970</b>	<b>2,536,574</b>	<b>2,868,194</b>	<b>10</b>	<b>12.39</b>

### Staffing

WIOA Policy Analyst – One position in Portland

WIOA Workforce VR Counselors – One position based in Central Oregon and one position in Lane County

WIOA Technology Specialists – One position based in Central Oregon and one position based in Portland

Employment First VR Counselor – One position based in Salem

# Budget Narrative

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## 102 Summer Work Experience Program Staff Classification

### **Purpose**

The Commission for the Blind has implemented the use of shared/centralized human resources services through the Department of Administrative Services Chief Human Resources Office as a means to ensure effective and efficient business practices in the administration of human resources for the agency.

The Oregon Commission for the Blind administers a Summer Work Experience Program for youth aged 16-21. This program is based in two locations: Salem at the Oregon School for the Deaf; and Portland State University.

The Oregon School for the Deaf includes a comprehensive assessment of pre-employment skills and job readiness in addition to a supported work model for individuals who require additional support on the job in order to be successful.

The Portland State University model is designed for youth who have participated in the Salem program and have met certain benchmarks that allow for a higher level of independent living and travel and extended length of work experience.

Both of these programs require coordination, planning, program administration and evaluation annually. This process begins in January and concludes in September. The program administrators (one manager for Salem and one for Portland) have been hired each year as temporary employees. In consultation with the agency Chief Human Resource Office HR Client Manager, the agency learned that this routine business function should be carried out by positions classified as seasonal employees and not temporary employees.

### **How Achieved**

This policy package would utilize existing resources within the agency budget and would add two seasonal positions, one seasonal FTE, to the agency and shift funds from Special Payments to Personal Services. This change would align the agency position management and hiring practices with the current guidelines and standards

## Budget Narrative

around the use of temporary employees in conducting state business.

<b>Expenditures by Category</b>	<b>GF</b>	<b>OF</b>	<b>FF</b>	<b>TF</b>	<b>Pos.</b>	<b>FTE</b>
Personal Services	36,116	-	133,006	169,122	2	1.00
Services & Supplies	760	-	2,814	3,574		
Capital Outlay	-	-	-	-		
Special Payments	(36,876)	-	(135,820)	(172,696)		
<b>Total Expenditures</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>2</b>	<b>1.00</b>

### Staffing

SWEP PEM A Supervisory Manager – One position for Portland and one position for Salem



## Budget Narrative

### 091 Analyst Recommendations

#### Vocational Rehabilitation Counselor (1.0 FTE)

Reduction reverses the progress made in reducing the time to process applications and plans and will also increase caseload size, affecting employment outcomes. This position serves individuals who are seeking vocational rehabilitation services throughout Lane County. The services of vocational rehabilitation are required to be statewide and this reduction will mean that staff will travel larger distances to serve clients and the remaining caseload carrying counselors will have a larger caseload and geographic service territory.

<b>Expenditures by Category</b>	<b>GF</b>	<b>OF</b>	<b>FF</b>	<b>TF</b>	<b>Pos.</b>	<b>FTE</b>
Personal Services	(43,606)	-	(161,115)	(204,721)	(1)	(1.00)
Services & Supplies	-	-	-	-		
Capital Outlay	-	-	-	-		
Special Payments	-	-	-	-		
<b>Total Expenditures</b>	<b>(43,606)</b>	<b>-</b>	<b>(161,115)</b>	<b>(204,721)</b>	<b>(1)</b>	<b>(1.00)</b>



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(30,632)	-	-	-	-	-	(30,632)
Other Revenues	-	-	-	-	-	-	-
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>(\$30,632)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(\$30,632)</b>
<b>Transfers Out</b>							
Tsfr To Human Svcs, Dept of	-	-	-	-	-	-	-
<b>Total Transfers Out</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Personal Services</b>							
Temporary Appointments	69	-	100	1,537	-	-	1,706
Overtime Payments	19	-	-	78	-	-	97
All Other Differential	35	-	47	382	-	-	464
Public Employees' Retire Cont	11	-	9	88	-	-	108
Pension Obligation Bond	(18,559)	-	-	(33,324)	-	-	(51,883)
Social Security Taxes	9	-	12	153	-	-	174
Mass Transit Tax	285	-	(800)	-	-	-	(515)
Vacancy Savings	(12,501)	-	2,362	(39,423)	-	-	(49,562)
<b>Total Personal Services</b>	<b>(\$30,632)</b>	<b>-</b>	<b>\$1,730</b>	<b>(\$70,509)</b>	<b>-</b>	<b>-</b>	<b>(\$99,411)</b>
<b>Total Expenditures</b>							
Total Expenditures	(30,632)	-	1,730	(70,509)	-	-	(99,411)
<b>Total Expenditures</b>	<b>(\$30,632)</b>	<b>-</b>	<b>\$1,730</b>	<b>(\$70,509)</b>	<b>-</b>	<b>-</b>	<b>(\$99,411)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Rehabilitative Services  
 Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Ending Balance</b>							
Ending Balance	-	-	(1,730)	70,509	-	-	68,779
<b>Total Ending Balance</b>	-	-	<b>(\$1,730)</b>	<b>\$70,509</b>	-	-	<b>\$68,779</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 031 - Standard Inflation

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	24,590	-	-	-	-	-	24,590
Other Revenues	-	-	-	-	-	-	-
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>\$24,590</b>	-	-	-	-	-	<b>\$24,590</b>

**Services & Supplies**

Instate Travel	72	-	857	4,969	-	-	5,898
Out of State Travel	-	-	124	549	-	-	673
Employee Training	58	-	124	1,158	-	-	1,340
Office Expenses	22	-	290	1,075	-	-	1,387
Telecommunications	53	-	806	2,656	-	-	3,515
State Gov. Service Charges	15,613	-	-	-	-	-	15,613
Data Processing	-	-	207	1,291	-	-	1,498
Publicity and Publications	-	-	5	18	-	-	23
Professional Services	-	-	2,406	10,982	-	-	13,388
IT Professional Services	-	-	-	-	-	-	-
Attorney General	-	-	117	1,401	-	-	1,518
Employee Recruitment and Develop	-	-	-	-	-	-	-
Dues and Subscriptions	-	-	8	62	-	-	70
Facilities Rental and Taxes	1,863	-	10,342	10,926	-	-	23,131
Fuels and Utilities	-	-	41	165	-	-	206
Facilities Maintenance	-	-	31	191	-	-	222
Agency Program Related S and S	-	-	321	1,712	-	-	2,033
Other Services and Supplies	-	-	134	1,632	-	-	1,766
Expendable Prop 250 - 5000	563	-	414	3,722	-	-	4,699

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 031 - Standard Inflation

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
IT Expendable Property	258	-	1,928	-	-	-	2,186
<b>Total Services &amp; Supplies</b>	<b>\$18,502</b>	-	<b>\$18,155</b>	<b>\$42,509</b>	-	-	<b>\$79,166</b>
<b>Capital Outlay</b>							
Office Furniture and Fixtures	-	-	-	257	-	-	257
Telecommunications Equipment	-	-	-	-	-	-	-
Technical Equipment	-	-	-	783	-	-	783
Data Processing Software	-	-	-	-	-	-	-
Data Processing Hardware	-	-	-	-	-	-	-
Building Structures	-	-	-	-	-	-	-
<b>Total Capital Outlay</b>	-	-	-	<b>\$1,040</b>	-	-	<b>\$1,040</b>
<b>Special Payments</b>							
Other Special Payments	6,088	-	8,729	131,194	-	-	146,011
<b>Total Special Payments</b>	<b>\$6,088</b>	-	<b>\$8,729</b>	<b>\$131,194</b>	-	-	<b>\$146,011</b>
<b>Total Expenditures</b>							
Total Expenditures	24,590	-	26,884	174,743	-	-	226,217
<b>Total Expenditures</b>	<b>\$24,590</b>	-	<b>\$26,884</b>	<b>\$174,743</b>	-	-	<b>\$226,217</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(26,884)	(174,743)	-	-	(201,627)
<b>Total Ending Balance</b>	-	-	<b>(\$26,884)</b>	<b>(\$174,743)</b>	-	-	<b>(\$201,627)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 032 - Above Standard Inflation

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	57,575	-	-	-	-	-	57,575
<b>Total Revenues</b>	<b>\$57,575</b>	-	-	-	-	-	<b>\$57,575</b>
<b>Services &amp; Supplies</b>							
Instate Travel	10,264	-	-	-	-	-	10,264
Telecommunications	8,519	-	-	-	-	-	8,519
Data Processing	10,691	-	-	-	-	-	10,691
Other Services and Supplies	28,101	-	-	-	-	-	28,101
<b>Total Services &amp; Supplies</b>	<b>\$57,575</b>	-	-	-	-	-	<b>\$57,575</b>
<b>Total Expenditures</b>							
Total Expenditures	57,575	-	-	-	-	-	57,575
<b>Total Expenditures</b>	<b>\$57,575</b>	-	-	-	-	-	<b>\$57,575</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Commission for the Blind**  
**Pkg: 060 - Technical Adjustments**

**Cross Reference Name: Rehabilitative Services**  
**Cross Reference Number: 58500-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(52,098)	-	-	-	-	-	(52,098)
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>(\$52,098)</b>	-	-	-	-	-	<b>(\$52,098)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	-	-	-	-	-	-	-
Overtime Payments	(510)	-	-	(706)	-	-	(1,216)
All Other Differential	(938)	-	-	(3,440)	-	-	(4,378)
Empl. Rel. Bd. Assessments	-	-	-	-	-	-	-
Public Employees' Retire Cont	(276)	-	-	(792)	-	-	(1,068)
Social Security Taxes	(111)	-	-	(317)	-	-	(428)
Worker's Comp. Assess. (WCD)	-	-	-	-	-	-	-
Flexible Benefits	-	-	-	-	-	-	-
<b>Total Personal Services</b>	<b>(\$1,835)</b>	-	-	<b>(\$5,255)</b>	-	-	<b>(\$7,090)</b>
<b>Services &amp; Supplies</b>							
Instate Travel	(1,944)	-	-	(44,767)	-	-	(46,711)
Employee Training	(1,581)	-	-	(10,433)	-	-	(12,014)
Office Expenses	(594)	-	-	(9,688)	-	-	(10,282)
Telecommunications	(1,440)	-	-	(23,925)	-	-	(25,365)
State Gov. Service Charges	-	-	-	(21,684)	-	-	(21,684)
Data Processing	-	-	-	(12,000)	-	-	(12,000)
Publicity and Publications	-	-	-	(250)	-	-	(250)
Dues and Subscriptions	-	-	-	(559)	-	-	(559)

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 060 - Technical Adjustments

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Facilities Rental and Taxes	(27,000)	-	-	(95,235)	-	-	(122,235)
Fuels and Utilities	-	-	-	(1,490)	-	-	(1,490)
Facilities Maintenance	-	-	-	(1,724)	-	-	(1,724)
Other Services and Supplies	-	-	-	(15,000)	-	-	(15,000)
Expendable Prop 250 - 5000	(15,204)	-	-	(5,000)	-	-	(20,204)
<b>Total Services &amp; Supplies</b>	<b>(\$47,763)</b>	-	-	<b>(\$241,755)</b>	-	-	<b>(\$289,518)</b>
<b>Special Payments</b>							
Other Special Payments	(2,500)	-	-	(23,891)	-	-	(26,391)
<b>Total Special Payments</b>	<b>(\$2,500)</b>	-	-	<b>(\$23,891)</b>	-	-	<b>(\$26,391)</b>
<b>Total Expenditures</b>							
Total Expenditures	(52,098)	-	-	(270,901)	-	-	(322,999)
<b>Total Expenditures</b>	<b>(\$52,098)</b>	-	-	<b>(\$270,901)</b>	-	-	<b>(\$322,999)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	270,901	-	-	270,901
<b>Total Ending Balance</b>	-	-	-	<b>\$270,901</b>	-	-	<b>\$270,901</b>
<b>Total FTE</b>							
Total FTE	-	-	-	-	-	-	-
<b>Total FTE</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 070 - Revenue Shortfalls

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Special Payments</b>							
Other Special Payments	-	-	-	(608,384)	-	-	(608,384)
<b>Total Special Payments</b>	-	-	-	<b>(\$608,384)</b>	-	-	<b>(\$608,384)</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	-	(608,384)	-	-	(608,384)
<b>Total Expenditures</b>	-	-	-	<b>(\$608,384)</b>	-	-	<b>(\$608,384)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	608,384	-	-	608,384
<b>Total Ending Balance</b>	-	-	-	<b>\$608,384</b>	-	-	<b>\$608,384</b>



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 090 - Analyst Adjustments

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(43,606)	-	-	-	-	-	(43,606)
Federal Funds	-	-	-	(161,115)	-	-	(161,115)
<b>Total Revenues</b>	<b>(\$43,606)</b>	-	-	<b>(\$161,115)</b>	-	-	<b>(\$204,721)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	(30,079)	-	-	(111,137)	-	-	(141,216)
Empl. Rel. Bd. Assessments	(12)	-	-	(45)	-	-	(57)
Public Employees' Retire Cont	(3,937)	-	-	(14,548)	-	-	(18,485)
Social Security Taxes	(2,301)	-	-	(8,502)	-	-	(10,803)
Worker's Comp. Assess. (WCD)	(15)	-	-	(54)	-	-	(69)
Flexible Benefits	(7,101)	-	-	(26,235)	-	-	(33,336)
Reconciliation Adjustment	(161)	-	-	(594)	-	-	(755)
<b>Total Personal Services</b>	<b>(\$43,606)</b>	-	-	<b>(\$161,115)</b>	-	-	<b>(\$204,721)</b>
<b>Total Expenditures</b>							
Total Expenditures	(43,606)	-	-	(161,115)	-	-	(204,721)
<b>Total Expenditures</b>	<b>(\$43,606)</b>	-	-	<b>(\$161,115)</b>	-	-	<b>(\$204,721)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 090 - Analyst Adjustments

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Total Positions</b>							
Total Positions							(1)
<b>Total Positions</b>	-	-	-	-	-	-	<b>(1)</b>
<b>Total FTE</b>							
Total FTE							(1.00)
<b>Total FTE</b>	-	-	-	-	-	-	<b>(1.00)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 091 - Statewide Adjustment DAS Chgs

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(2,832)	-	-	-	-	-	(2,832)
Federal Funds	-	-	-	(22,687)	-	-	(22,687)
<b>Total Revenues</b>	<b>(\$2,832)</b>	<b>-</b>	<b>-</b>	<b>(\$22,687)</b>	<b>-</b>	<b>-</b>	<b>(\$25,519)</b>
<b>Services &amp; Supplies</b>							
State Gov. Service Charges	(1,160)	-	-	(3,304)	-	-	(4,464)
Facilities Rental and Taxes	-	-	(9,189)	-	-	-	(9,189)
Other Services and Supplies	(1,672)	-	-	(19,383)	-	-	(21,055)
<b>Total Services &amp; Supplies</b>	<b>(\$2,832)</b>	<b>-</b>	<b>(\$9,189)</b>	<b>(\$22,687)</b>	<b>-</b>	<b>-</b>	<b>(\$34,708)</b>
<b>Total Expenditures</b>							
Total Expenditures	(2,832)	-	(9,189)	(22,687)	-	-	(34,708)
<b>Total Expenditures</b>	<b>(\$2,832)</b>	<b>-</b>	<b>(\$9,189)</b>	<b>(\$22,687)</b>	<b>-</b>	<b>-</b>	<b>(\$34,708)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	9,189	-	-	-	9,189
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>\$9,189</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$9,189</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 092 - Statewide AG Adjustment

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
Federal Funds	-	-	-	(859)	-	-	(859)
<b>Total Revenues</b>	-	-	-	<b>(\$859)</b>	-	-	<b>(\$859)</b>
<b>Services &amp; Supplies</b>							
Attorney General	-	-	-	(859)	-	-	(859)
<b>Total Services &amp; Supplies</b>	-	-	-	<b>(\$859)</b>	-	-	<b>(\$859)</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	-	(859)	-	-	(859)
<b>Total Expenditures</b>	-	-	-	<b>(\$859)</b>	-	-	<b>(\$859)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 101 - WIOA and Employment First

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	118,399	-	-	-	-	-	118,399
Other Revenues	-	-	209,527	-	-	-	209,527
Federal Funds	-	-	-	898,729	-	-	898,729
<b>Total Revenues</b>	<b>\$118,399</b>	<b>-</b>	<b>\$209,527</b>	<b>\$898,729</b>	<b>-</b>	<b>-</b>	<b>\$1,226,655</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	149,540	-	-	500,051	-	-	649,591
Empl. Rel. Bd. Assessments	49	-	-	134	-	-	183
Public Employees' Retire Cont	21,770	-	-	73,578	-	-	95,348
Social Security Taxes	11,437	-	-	38,256	-	-	49,693
Worker's Comp. Assess. (WCD)	64	-	-	158	-	-	222
Mass Transit Tax	176	-	-	-	-	-	176
Flexible Benefits	28,738	-	-	79,604	-	-	108,342
Reconciliation Adjustment	10,026	-	-	37,045	-	-	47,071
<b>Total Personal Services</b>	<b>\$221,800</b>	<b>-</b>	<b>-</b>	<b>\$728,826</b>	<b>-</b>	<b>-</b>	<b>\$950,626</b>
<b>Services &amp; Supplies</b>							
Instate Travel	5,334	-	(19,123)	(26,410)	-	-	(40,199)
Out of State Travel	4,412	-	(2,968)	952	-	-	2,396
Employee Training	-	-	1,073	1,858	-	-	2,931
Office Expenses	-	-	(1,378)	17,444	-	-	16,066
Telecommunications	(4,053)	-	(11,894)	4,168	-	-	(11,779)
State Gov. Service Charges	(1,812)	-	13,037	50,855	-	-	62,080
Data Processing	(7,990)	-	(1,172)	4,910	-	-	(4,252)

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 101 - WIOA and Employment First

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Publicity and Publications	92	-	(138)	46	-	-	-
Professional Services	18,464	-	(21,000)	(97,464)	-	-	(100,000)
IT Professional Services	37,800	-	-	142,200	-	-	180,000
Attorney General	3,058	-	(1,004)	(2,054)	-	-	-
Dues and Subscriptions	330	-	(232)	(98)	-	-	-
Facilities Rental and Taxes	(1,863)	-	(94,938)	183,139	-	-	86,338
Fuels and Utilities	823	-	(1,159)	(538)	-	-	(874)
Facilities Maintenance	1,054	-	(519)	1,107	-	-	1,642
Agency Program Related S and S	-	-	(1,970)	(28,030)	-	-	(30,000)
Other Services and Supplies	(23,110)	-	3,604	12,942	-	-	(6,564)
Expendable Prop 250 - 5000	(116)	-	-	(64,542)	-	-	(64,658)
IT Expendable Property	(4,564)	-	(54,048)	24,002	-	-	(34,610)
<b>Total Services &amp; Supplies</b>	<b>\$27,859</b>	<b>-</b>	<b>(\$193,829)</b>	<b>\$224,487</b>	<b>-</b>	<b>-</b>	<b>\$58,517</b>
<b>Capital Outlay</b>							
Office Furniture and Fixtures	-	-	-	(7,213)	-	-	(7,213)
Technical Equipment	-	-	-	(21,936)	-	-	(21,936)
<b>Total Capital Outlay</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(\$29,149)</b>	<b>-</b>	<b>-</b>	<b>(\$29,149)</b>
<b>Special Payments</b>							
Other Special Payments	(131,260)	-	569,469	404,869	-	-	843,078
<b>Total Special Payments</b>	<b>(\$131,260)</b>	<b>-</b>	<b>\$569,469</b>	<b>\$404,869</b>	<b>-</b>	<b>-</b>	<b>\$843,078</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 101 - WIOA and Employment First

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Total Expenditures</b>							
Total Expenditures	118,399	-	375,640	1,329,033	-	-	1,823,072
<b>Total Expenditures</b>	<b>\$118,399</b>	<b>-</b>	<b>\$375,640</b>	<b>\$1,329,033</b>	<b>-</b>	<b>-</b>	<b>\$1,823,072</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(166,113)	(430,304)	-	-	(596,417)
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>(\$166,113)</b>	<b>(\$430,304)</b>	<b>-</b>	<b>-</b>	<b>(\$596,417)</b>
<b>Total Positions</b>							
Total Positions							1
<b>Total Positions</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1</b>
<b>Total FTE</b>							
Total FTE							5.39
<b>Total FTE</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>5.39</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 102 - SWEF Seasonal

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	19,968	-	-	73,776	-	-	93,744
Empl. Rel. Bd. Assessments	18	-	-	68	-	-	86
Public Employees' Retire Cont	3,812	-	-	14,084	-	-	17,896
Social Security Taxes	1,528	-	-	5,644	-	-	7,172
Worker's Comp. Assess. (WCD)	22	-	-	80	-	-	102
Mass Transit Tax	118	-	-	-	-	-	118
Flexible Benefits	10,650	-	-	39,354	-	-	50,004
<b>Total Personal Services</b>	<b>\$36,116</b>	-	-	<b>\$133,006</b>	-	-	<b>\$169,122</b>
<b>Services &amp; Supplies</b>							
Telecommunications	494	-	-	1,824	-	-	2,318
Other Services and Supplies	266	-	-	990	-	-	1,256
<b>Total Services &amp; Supplies</b>	<b>\$760</b>	-	-	<b>\$2,814</b>	-	-	<b>\$3,574</b>
<b>Special Payments</b>							
Other Special Payments	(36,876)	-	-	(135,820)	-	-	(172,696)
<b>Total Special Payments</b>	<b>(\$36,876)</b>	-	-	<b>(\$135,820)</b>	-	-	<b>(\$172,696)</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	-	-	-	-	-
<b>Total Expenditures</b>	-	-	-	-	-	-	-



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 102 - SWEP Seasonal

Cross Reference Name: Rehabilitative Services  
Cross Reference Number: 58500-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-
<b>Total Positions</b>							
Total Positions							2
<b>Total Positions</b>	-	-	-	-	-	-	2
<b>Total FTE</b>							
Total FTE							1.00
<b>Total FTE</b>	-	-	-	-	-	-	1.00

01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:002-00-00 Rehabilitative Services

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

2017-19  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 090 - Analyst Adjustments

POSITION NUMBER CLASS COMP CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
7042004 OAS C6647 AP VOC REHABILITATION COUNSELOR	1-	1.00-	24.00-	09	5,884.00	30,079- 13,366-		111,137- 49,384-		141,216- 62,750-
TOTAL PICS SALARY						30,079-		111,137-		141,216-
TOTAL PICS OPE						13,366-		49,384-		62,750-
TOTAL PICS PERSONAL SERVICES =	1-	1.00-	24.00-			43,445-		160,521-		203,966-

PACKAGE: 101 - WIOA and Employment First

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0009002	OAS C0104 AP	OFFICE SPECIALIST 2	1-	.50-	12.00-	02	2,716.00	5,651- 6,974-		26,941- 33,247-		32,592- 40,221-
0009004	OAS C0104 AP	OFFICE SPECIALIST 2	1-	1.00-	24.00-	09	3,669.00	18,756- 11,018-		69,300- 40,706-		88,056- 51,724-
0009007	OAS C0104 AP	OFFICE SPECIALIST 2	1-	.61-	14.60-	09	3,669.00	9,347- 7,778-		44,220- 36,794-		53,567- 44,572-
0009008	OAS C0104 AP	OFFICE SPECIALIST 2	1-	.50-	12.00-	02	2,716.00	5,651- 6,974-		26,941- 33,247-		32,592- 40,221-
0031003	MMS X7004 AA	PRINCIPAL EXECUTIVE/MANAGER C		.25	6.00	09	6,673.00	8,528 4,062		31,510 15,009		40,038 19,071
0507002	OAS C2333 AP	REHAB INST FOR THE BLIND		.25	6.00	09	5,343.00	6,828 3,198		25,230 11,815		32,058 15,013
0800002	OAS C2333 AP	REHAB INST FOR THE BLIND		.25	6.00	02	3,847.00	4,916 2,801		18,166 10,351		23,082 13,152
0800003	OAS C2333 AP	REHAB INST FOR THE BLIND		.25	6.00	07	4,860.00	6,211 3,070		22,949 11,343		29,160 14,413
0800007	OAS C0104 AP	OFFICE SPECIALIST 2	1-	.50-	12.00-	09	3,669.00	9,378- 9,073-		34,650- 33,520-		44,028- 42,593-
1719005	MESNZ0872 AA	OPERATIONS & POLICY ANALYST 3	1	1.00	24.00	02	5,496.00	28,096 14,641		103,808 54,093		131,904 68,734
1719006	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1	1.00	24.00	02	4,217.00	21,557 11,599		79,651 42,853		101,208 54,452
1719007	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1	1.00	24.00	02	4,217.00	21,557 11,599		79,651 42,853		101,208 54,452
1719008	OAS C2333 AP	REHAB INST FOR THE BLIND	1	1.00	24.00	02	3,847.00	19,666 11,206		72,662 41,405		92,328 52,611
1719009	OAS C2333 AP	REHAB INST FOR THE BLIND	1	1.00	24.00	02	3,847.00	19,666 11,206		72,662 41,405		92,328 52,611
1719010	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1	1.00	24.00	02	4,217.00	21,557 11,599		79,651 42,853		101,208 54,452
7042001	OAS C2333 AP	REHAB INST FOR THE BLIND		.25	6.00	08	5,095.00	6,511 3,132		24,059 11,574		30,570 14,706

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01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:002-00-00 Rehabilitative Services

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

2017-19  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 101 - WIOA and Employment First

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE		
7042002	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1-	1.00-	24.00-	05	4,860.00	23,328- 11,531-		93,312- 46,122-		116,640- 57,653-		
7042002	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1	1.00	24.00	05	4,860.00	24,844 12,281		91,796 45,372		116,640 57,653		
7042003	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1-	1.00-	24.00-	05	4,860.00	23,328- 11,531-		93,312- 46,122-		116,640- 57,653-		
7042003	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1	1.00	24.00	05	4,860.00	24,844 12,281		91,796 45,372		116,640 57,653		
7042008	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1-	1.00-	24.00-	07	5,343.00	25,646- 12,011-		102,586- 48,047-		128,232- 60,058-		
7042008	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1	1.00	24.00	07	5,343.00	27,313 12,793		100,919 47,265		128,232 60,058		
7235003	OAS C2333 AP	REHAB INST FOR THE BLIND		.25	6.00	07	4,860.00	6,211 3,070		22,949 11,343		29,160 14,413		
7235004	OAS C2333 AP	REHAB INST FOR THE BLIND		.25	6.00	09	5,343.00	6,828 3,198		25,230 11,815		32,058 15,013		
7235005	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1-	1.00-	24.00-	09	5,884.00	28,243- 12,550-		112,973- 50,200-		141,216- 62,750-		
7235005	OAS C6647 AP	VOC REHABILITATION COUNSELOR	1	1.00	24.00	09	5,884.00	30,079 13,366		111,137 49,384		141,216 62,750		
7235007	OAS C2333 AP	REHAB INST FOR THE BLIND		.25	6.00	09	5,343.00	6,828 3,198		25,230 11,815		32,058 15,013		
7235008	OAS C2333 AP	REHAB INST FOR THE BLIND		.25	6.00	09	5,343.00	6,828 3,198		25,230 11,815		32,058 15,013		
TOTAL PICS SALARY								149,540		500,051		649,591		
TOTAL PICS OPE								62,058		191,730		253,788		
TOTAL PICS PERSONAL SERVICES =								1	5.14	123.40		691,781		903,379

01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:002-00-00 Rehabilitative Services

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

2017-19  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 102 - SWEP Seasonal

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
1719011	MESNZ7000 AA	PRINCIPAL EXECUTIVE/MANAGER A	1	.50	12.00	02	3,906.00	9,984 8,015		36,888 29,615		46,872 37,630
1719012	MESNZ7000 AA	PRINCIPAL EXECUTIVE/MANAGER A	1	.50	12.00	02	3,906.00	9,984 8,015		36,888 29,615		46,872 37,630
TOTAL PICS SALARY								19,968		73,776		93,744
TOTAL PICS OPE								16,030		59,230		75,260
TOTAL PICS PERSONAL SERVICES =			2	1.00	24.00			35,998		133,006		169,004

**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

Commission for the Blind  
2017-19 Biennium

Agency Number: 58500  
Cross Reference Number: 58500-002-00-00-00000

<i>Source</i>	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
<b>Other Funds</b>						
Other Revenues	706,675	600,213	597,548	995,641	995,641	-
Transfer In - Intrafund	175,404	-	-	-	-	-
Transfer Out - Intrafund	(412,987)	-	-	-	-	-
<b>Total Other Funds</b>	<b>\$469,092</b>	<b>\$600,213</b>	<b>\$597,548</b>	<b>\$995,641</b>	<b>\$995,641</b>	<b>-</b>
<b>Federal Funds</b>						
Federal Funds	8,125,957	8,159,801	8,312,380	7,812,166	7,627,505	-
<b>Total Federal Funds</b>	<b>\$8,125,957</b>	<b>\$8,159,801</b>	<b>\$8,312,380</b>	<b>\$7,812,166</b>	<b>\$7,627,505</b>	<b>-</b>

# DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Source	Fund	ORBITS Revenue Acct	2013-2015 Actual	2015-17 Legislatively Adopted	2015-17 Estimated	2017-19		
						Agency Request	Governor's	Legislatively Adopted
<u>Rehabilitation Services</u>								
<u>58500-002-00-00-00000</u>								
Charges for Services	OF	0410	0	0	0	0	0	
Interest Income	OF	0605	0	0	0	0	0	
Sales Income	OF	0705	0	0	0	0	0	
Donations	OF	0905	0	0	0	0	0	
Other Revenue	OF	0975	706,675	600,213	597,548	995,641	995,641	
Transfers In – Intrafund	OF	1010	175,404	0	0	0	0	
Transfers Out – Intrafund	OF	2010	(412,987)	0	0	0	0	
<b>TOTAL OTHER FUNDS</b>			<b>469,092</b>	<b>600,213</b>	<b>597,548</b>	<b>995,641</b>	<b>995,641</b>	
Federal Funds	FF	0995	8,125,957	8,159,801	8,312,380	7,812,166	7,627,505	
<b>TOTAL FEDERAL FUNDS</b>			<b>8,125,957</b>	<b>8,159,801</b>	<b>8,312,380</b>	<b>7,812,166</b>	<b>7,627,505</b>	

\_\_\_\_\_ Agency Request

Governor's Budget

\_\_\_\_\_ Legislatively Adopted

Budget Page \_\_\_\_\_


# Budget Narrative

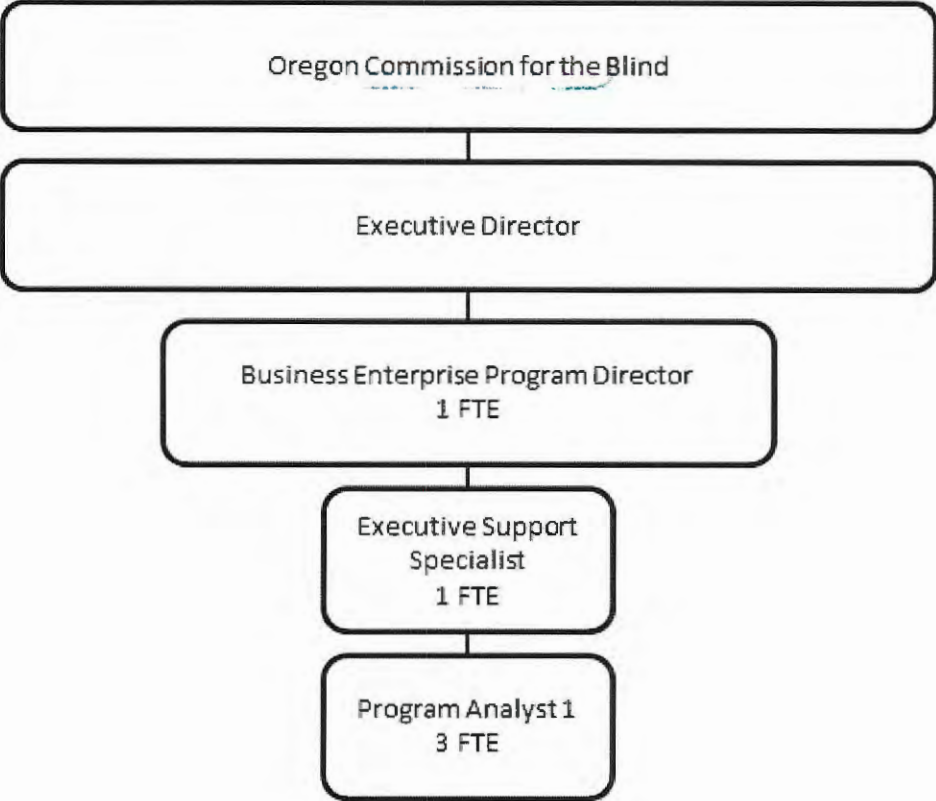
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## BUSINESS ENTERPRISE




# Budget Narrative

 Oregon Commission for the Blind  
Business Enterprise Program Unit  
Agency Requested Budget 2017-19 (5 FTE)



# Budget Narrative

 Oregon Commission for the Blind  
Business Enterprise Program Unit  
Governor's Budget 2017-19 (4.5 FTE)

Oregon Commission for the Blind

Executive Director

Business Enterprise Program Director  
1 FTE

Executive Support  
Specialist  
1 FTE

Program Analyst 1  
2.5 FTE

Business  
Development  
Specialist  
(0.50 FTE)

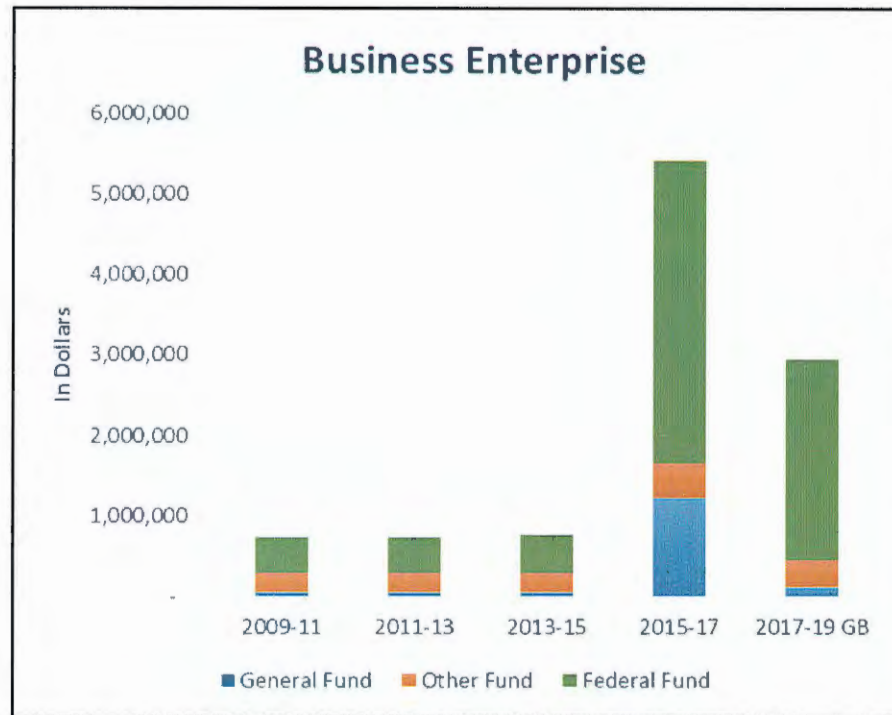
*\* Not Included in Governor's Budget*

# Budget Narrative

## Business Enterprise Program Unit Executive Summary

Program Contact:

Eric Morris, 971-673-1588  
eric.morris@state.or.us



# Budget Narrative

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## Program Overview

The Business Enterprise Program provides services and support to individuals who are legally blind who operate their own business, most of which are centered on food service in public/government facilities throughout the state. Upon successful completion of their individualized vocational rehabilitation through the agency Rehabilitation Services program, the Business Enterprise Program (BEP) trains, licenses and supports individuals who are legally blind in operating food service and vending in public buildings.

The BEP contracts with public agencies and then enters into operating agreements with licensed blind managers to provide services desired by facilities, thus creating employment opportunities for individuals who are blind. Licensed blind managers run the day-to-day operations, retaining the profits they generate. Each licensed blind manager pays 11% of their net earnings as a set-aside to support the program. The set-aside is used for continued training of the licensed blind managers, maintenance, repair and purchasing of equipment.

BEP currently has 16 individuals who are blind operating food service and vending machines locations throughout the state. It is funded primarily by federal vocational rehabilitation funds that are leveraged by a combination of general fund and set-aside contributions made by the individuals who are in the program. The BEP is the smallest program operated by the agency, yet is often the most visible to policy makers and the public.

## Program Funding Request

The Requested Budget for the Business Enterprise Program Unit, with corresponding performance projections, is summarized below.

## Budget Narrative

	2017-19 GB	2019-21	2021-2023	2023-25
General Fund	120,712	124,213	127,815	131,522
Other Fund	332,210	341,844	351,757	361,958
Federal Fund <sup>(1)</sup>	2,504,425	905,771	932,038	959,067
<b>Total Funds</b>	<b>2,957,347</b>	<b>1,371,828</b>	<b>1,411,610</b>	<b>1,452,547</b>

<sup>(1)</sup> 2019-21 Phase out remainder of Vending Machine Investment

### Program Description

The Oregon Commission for the Blind (OCB) is the designated State Licensing Agency for the Business Enterprise Program (BEP) under the Federal Randolph-Sheppard Act. Oregon's BEP program operates by the authority of Oregon Revised Statutes 346.510 – 346.570.

The purpose of the program is to provide for-profit business management opportunities for Oregonians who are legally blind and to provide customers with high-quality food service and vending programs.

As the state licensing agency the BEP has the following Federal and State mandated responsibilities:

1. Selecting, training and licensing of qualified individuals.
2. Continuing education of all licensed individuals.
3. Processing monthly financial information for all facilities, including billing & collections of required fees.
4. Ongoing maintenance of established facilities.
5. Ensuring licensees are in compliance with Federal and State agreements.
6. Inspecting and evaluating all facilities annually.
7. Gathering data on potential new facilities being built or acquired.
8. Surveying new locations for new opportunities on Federal, State and other public properties.
9. Establishing new opportunities on Federal, State and other properties.
10. Negotiating agreements with Federal, State and other agencies.

## Budget Narrative

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11. Managing agreements with Federal, State and other agencies.
12. Enforcing the Randolph-Sheppard Act and the Code of Federal Regulations, part 395.
13. Enforcing Oregon Revised Statutes 346.510 – 346.570.

### **Program Justification**

The Business Enterprise Program is directly aligned with the following priority established by Governor Brown:

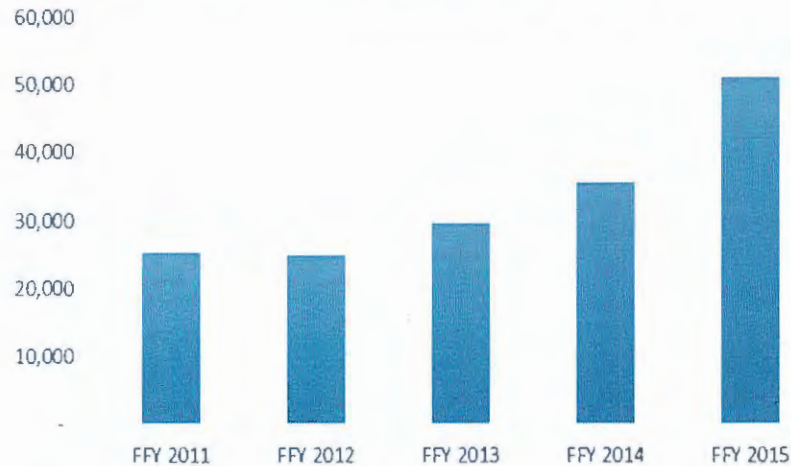
#### ***A Thriving Statewide Economy for all Oregonians***

The Commission for the Blind is about helping individuals who are blind and want to gain or retain employment to acquire the necessary adaptive skills for full participation in the workforce. The Business Enterprise Program is one of the most visible aspect of the work of the Commission for the Blind. As these Entrepreneurs who are blind carry out the work of their businesses in public buildings throughout Oregon, they function as ambassadors of the agency. They have an opportunity to demonstrate each day that with training and support, individuals who are blind are fully capable of running successful, profitable businesses.

# Budget Narrative

## Program Performance

Average Annual Income per Manager



	<b>FFY 2011</b>	<b>FFY 2012</b>	<b>FFY 2013</b>	<b>FFY 2014</b>	<b>FFY 2015</b>
Program Gross Sales	1,597,600	2,172,939	2,747,521	2,822,708	2,993,035
Net Income	430,221	423,509	503,556	571,314	820,037
Average Manager Income	25,307	24,912	29,621	35,707	51,252
Licensed Managers	17	17	17	16	16

Source - RSA-15

# Budget Narrative

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## **Enabling Legislation/Program Authorization**

States may operate the federal program under the Randolph-Sheppard Vending Stand Act Public Law 74-732. Created in 1936, the Federal Randolph-Sheppard Act provides priority for the operation of vending facilities in Federal locations.

ORS 346.510-570 states that Oregon shall operate the Business Enterprise Program. Oregon passed this law providing a preference and opportunity to bid on facilities in state and municipal locations in 1957.

## **Funding Streams**

The program budget is made up of a combination of federal vocational rehabilitation funds that are matched by a combination of General Fund and set aside expenditures from the program

## **Changes from 2015-17 Approved Budget**

The investment of vending machine purchases approved during the 2016 Legislative Session in the Business Enterprise Program is phased out in full for general fund and other funds, and half of the federal fund limitation. This remaining federal fund limitation is phased out in full starting in 2019-21. The limitation was carried forward to be consistent with the period of time this grant phase is allowed to be expended.

Other Funds are expected to increase during 2017-19 with the vending machine infrastructure investment.



# Budget Narrative

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## Program Unit Narrative

### Activities, Programs, and Issues

The Oregon Commission for the Blind (OCB) is the designated State Licensing Agency for the Business Enterprise Program (BEP) under the Federal Randolph-Sheppard Act. Oregon's BEP program operates by the authority of Oregon Revised Statutes 346.510 – 346.570.

The purpose of the program is to provide for-profit business management opportunities for Oregonians who are legally blind and to provide customers with high-quality food service and vending programs.

### Current operations

The Business Enterprise program provides one of the best opportunities for Oregonians who are blind to become successful small business owners.

There are 16 managers licensed by the agency. Those 16 manage the following operations statewide:

- 7 – Espresso stands.
- 8 – Vending routes (encompassing approx. 570 sites).
- 6 – Cafeterias.
- 2 – Snack bars.
- 1 – Dry stand (convenience store).

In 2015, these locations generated approx. \$3.0 million in sales. The average income per manager was approx. \$51,252.

## Budget Narrative

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### **Desired outcome measures**

Increase the number of licensed blind managers.  
Increase the profitability of locations.  
Increase the managers' average income.

### **Trends in Caseload and Workload Measures**

The agency is focused on the following:

Providing high-quality opportunities to entrepreneurs who are blind.  
Ensuring entrepreneurs have the equipment and tools they need to maximize their employment and earning potential.  
Ensuring all of the federal and state requirements related to the program are met.

### **Revenue Sources and Proposed Changes**

See Revenue Forecast Narrative under "Revenue" tab.

## Budget Narrative

### Essential and Policy Packages and Fiscal Impact Summary

The current service level through agency request budget showing expenditures by fund type, position and full-time equivalent positions for the Business Enterprise Program Unit is displayed in the following table.

	2017-19 Current Service Level	Package 101 WIOA Implementati on	2017-19 Agency Request Budget	Package 91-93 Analyst Rec	2017-19 Governor's Budget
General Fund	691,919	(478,774)	213,145	(92,433)	120,712
Other Fund	232,895	107,142	340,037	(7,827)	332,210
Federal Fund	2,166,840	345,310	2,512,150	(7,725)	2,504,425
<b>Total Funds</b>	<b>3,091,654</b>	<b>(26,322)</b>	<b>3,065,332</b>	<b>(107,985)</b>	<b>2,957,347</b>
Positions	5	-	5	-	5
FTE	5.00	-	5.00	(0.50)	4.50

### *Essential Packages*

#### 010 Non-PICS Personal Services / Vacancy Factor

##### Package Description

Provide allowances for non-PICS personal services budget items and to reflect savings from anticipated staff turnover. This package is based on vacancy experience, costs or temporary services and other items.

Adjustments from base budget total (\$10,137) ((\$8,473) Federal Funds, (\$1,517) General Fund, and (\$147) Other Funds).

# Budget Narrative

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## 022 Phase-Out Program & One Time Costs

### Package Description

Phase-outs are the result of one-time costs not funded in the 2017-19 biennium. For the 2017-19 biennium, the general fund and other fund portions of the 2016 Legislative request for procurement of vending machines is phased out, as well as half the federal fund limitation.

Adjustment from base budget total (\$2,503,330) ((\$1,624,172) Federal Funds, (\$680,109) General Fund, and (\$199,049) Other Fund).

## 031 Standard Inflation

### Package Description

Allows for a general inflation factor that applies to most Services and Supplies and non-PICS Personal Services costs, Capital Outlay and Come Special Payments. It also allows inflation at published rates for State Government Service Charges, uniform and non-uniform rent, various assessments and other items. It also includes the standard portion (3.7%) of medical cost increases, non-state employee personnel costs, as applied to Special Payments and usage-based Price List items.

Adjustments from base budget total \$33,155 (\$10,247 Federal Funds, \$13,410 General Fund, and \$9,498 Other Funds).

## 032 Above Standard Inflation

### Package Description

## Budget Narrative

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This package includes the amount above, not including standard inflation, for a limited number of expenditure types. For this program unit, the non-standard inflation relates to professional services.

Adjustments from base budget total \$12,466 (All General Fund).

### *Policy Packages*

#### **101 Workforce Investment and Opportunities Act (WIOA) Implementation**

##### **Related Legislation**

Workforce Innovation and Opportunity Act of 2014.

##### **Purpose**

The Workforce Innovation and Opportunity Act (WIOA), represents the first major reform of the public workforce system in more than 15 years. Achieving WIOA's ambitious goals required significant changes to workforce development programs, including improved collaboration across agencies, workforce boards, employers, and educational institutions; a greater focus on outcomes and efficiency; and better engagement with job seekers and employers. In order to make the necessary changes required under WIOA, the agency infrastructure has to expand to address all of the requirements under WIOA. This POP is designed to enhance the VR program and service delivery system to achieve a higher level of collaboration, partnership, outcomes and opportunities for Oregonians who are blind as expected by WIOA. These positions will create and maintain policy and infrastructure changes needed to support WIOA, provide training to staff, quality assurance, add partnerships, and add employment retention and sustainability to the service delivery model.

##### **Detail Plan**

The Business Enterprise Program unit is only impacted by moving the current funding between program units. See How Achieved section below.

## Budget Narrative

### How Achieved

Policy Option Package 101 is funded by the Vocational Rehabilitation Basic 110 grant increase in split for the statewide grant award, increased from 12.5% to 15.6%, the national average for blind agencies. Expenditures were adjusted within each program unit as positions were moved to accommodate the new support structure. All expenditure lines were reviewed for appropriate fund splits and adjustments were made between program units. All positions funding splits with PICS were reviewed and adjusted to match current funding streams within each program unit. As a result, the majority of the match requirement for the increase in federal funds was met within the current budget.

Fiscal impact by program unit is as follows:

	GF	OF	FF	TF	Pos.	FTE
<b>Revenue</b>	<b>(350)</b>	<b>259,194</b>	<b>2,536,574</b>	<b>2,795,418</b>		
Administrative Services	714,932	(20,704)	1,153,715	1,847,943	11	11.00
Rehabilitation Services Program	118,399	375,640	1,329,033	1,823,072	1	5.39
Business Enterprise Program	(478,774)	107,142	345,310	(26,322)	-	-
Orientation and Career Center Program	(157,570)	(130,108)	(2,836)	(290,514)	(2)	(1.50)
Independent Living Services Program	(197,337)	-	(288,648)	(485,985)	-	(2.50)
<b>Expenditures</b>	<b>(350)</b>	<b>331,970</b>	<b>2,536,574</b>	<b>2,868,194</b>	<b>10</b>	<b>12.39</b>

### Staffing

No staffing impact for this program unit.

## Budget Narrative

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### 091 – Analyst Recommendations

#### **Business Development Specialist (0.5 FTE)**

Reduction reverses prior biennium investment in the Business Enterprise Program. This position is responsible for managing current contracts and opportunities and securing additional opportunities. The reduction could compromise the agency's ability to manage our compliance responsibilities as well limit our ability to realize our expansion initiatives.

<b>Expenditures by Category</b>	<b>GF</b>	<b>OF</b>	<b>FF</b>	<b>TF</b>	<b>Pos.</b>	<b>FTE</b>
Personal Services	(90,552)	-	-	(90,552)	-	(0.50)
Services & Supplies	-	-	-	-	-	
Capital Outlay	-	-	-	-	-	
Special Payments	-	-	-	-	-	
<b>Total Expenditures</b>	<b>(90,552)</b>	<b>-</b>	<b>-</b>	<b>(90,552)</b>	<b>-</b>	<b>(0.50)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Business Enterprises  
 Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(1,517)	-	-	-	-	-	(1,517)
Other Revenues	-	-	-	-	-	-	-
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>(\$1,517)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(\$1,517)</b>
<b>Personal Services</b>							
Overtime Payments	-	-	-	-	-	-	-
Public Employees' Retire Cont	-	-	-	-	-	-	-
Pension Obligation Bond	12,187	-	-	789	-	-	12,976
Social Security Taxes	-	-	-	-	-	-	-
Unemployment Assessments	-	-	-	-	-	-	-
Mass Transit Tax	2,120	-	(147)	-	-	-	1,973
Vacancy Savings	(15,824)	-	-	(9,262)	-	-	(25,086)
<b>Total Personal Services</b>	<b>(\$1,517)</b>	<b>-</b>	<b>(\$147)</b>	<b>(\$8,473)</b>	<b>-</b>	<b>-</b>	<b>(\$10,137)</b>
<b>Total Expenditures</b>							
Total Expenditures	(1,517)	-	(147)	(8,473)	-	-	(10,137)
<b>Total Expenditures</b>	<b>(\$1,517)</b>	<b>-</b>	<b>(\$147)</b>	<b>(\$8,473)</b>	<b>-</b>	<b>-</b>	<b>(\$10,137)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	147	8,473	-	-	8,620
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>\$147</b>	<b>\$8,473</b>	<b>-</b>	<b>-</b>	<b>\$8,620</b>



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 021 - Phase - In

Cross Reference Name: Business Enterprises  
Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Special Payments</b>							
Other Special Payments	-	-	-	-	-	-	-
<b>Total Special Payments</b>	-	-	-	-	-	-	-
<b>Total Expenditures</b>							
Total Expenditures	-	-	-	-	-	-	-
<b>Total Expenditures</b>	-	-	-	-	-	-	-
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: Business Enterprises  
Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(680,109)	-	-	-	-	-	(680,109)
Other Revenues	-	-	(199,049)	-	-	-	(199,049)
Federal Funds	-	-	-	(1,624,172)	-	-	(1,624,172)
<b>Total Revenues</b>	<b>(\$680,109)</b>	<b>-</b>	<b>(\$199,049)</b>	<b>(\$1,624,172)</b>	<b>-</b>	<b>-</b>	<b>(\$2,503,330)</b>
<b>Special Payments</b>							
Other Special Payments	(680,109)	-	(199,049)	(1,624,172)	-	-	(2,503,330)
<b>Total Special Payments</b>	<b>(\$680,109)</b>	<b>-</b>	<b>(\$199,049)</b>	<b>(\$1,624,172)</b>	<b>-</b>	<b>-</b>	<b>(\$2,503,330)</b>
<b>Total Expenditures</b>							
Total Expenditures	(680,109)	-	(199,049)	(1,624,172)	-	-	(2,503,330)
<b>Total Expenditures</b>	<b>(\$680,109)</b>	<b>-</b>	<b>(\$199,049)</b>	<b>(\$1,624,172)</b>	<b>-</b>	<b>-</b>	<b>(\$2,503,330)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 031 - Standard Inflation

Cross Reference Name: Business Enterprises  
Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	13,410	-	-	-	-	-	13,410
Other Revenues	-	-	-	-	-	-	-
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>\$13,410</b>	-	-	-	-	-	<b>\$13,410</b>
<b>Services &amp; Supplies</b>							
Instate Travel	48	-	195	466	-	-	709
Out of State Travel	-	-	12	61	-	-	73
Employee Training	39	-	8	83	-	-	130
Office Expenses	15	-	4	83	-	-	102
Telecommunications	36	-	87	331	-	-	454
State Gov. Service Charges	10,399	-	-	-	-	-	10,399
Data Processing	-	-	5	22	-	-	27
Publicity and Publications	-	-	-	-	-	-	-
Professional Services	-	-	-	-	-	-	-
IT Professional Services	-	-	-	-	-	-	-
Attorney General	-	-	1,066	2,925	-	-	3,991
Employee Recruitment and Develop	-	-	-	-	-	-	-
Dues and Subscriptions	-	-	4	32	-	-	36
Facilities Rental and Taxes	1,581	-	1,007	3,675	-	-	6,263
Facilities Maintenance	-	-	-	-	-	-	-
Agency Program Related S and S	675	-	7,106	2,235	-	-	10,016
Other Services and Supplies	70	-	4	254	-	-	328
Expendable Prop 250 - 5000	375	-	-	80	-	-	455

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 031 - Standard Inflation

Cross Reference Name: Business Enterprises  
Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
IT Expendable Property	172	-	-	-	-	-	172
<b>Total Services &amp; Supplies</b>	<b>\$13,410</b>	-	<b>\$9,498</b>	<b>\$10,247</b>	-	-	<b>\$33,155</b>
<b>Capital Outlay</b>							
Data Processing Software	-	-	-	-	-	-	-
Data Processing Hardware	-	-	-	-	-	-	-
<b>Total Capital Outlay</b>	-	-	-	-	-	-	-
<b>Special Payments</b>							
Other Special Payments	-	-	-	-	-	-	-
<b>Total Special Payments</b>	-	-	-	-	-	-	-
<b>Total Expenditures</b>							
Total Expenditures	13,410	-	9,498	10,247	-	-	33,155
<b>Total Expenditures</b>	<b>\$13,410</b>	-	<b>\$9,498</b>	<b>\$10,247</b>	-	-	<b>\$33,155</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(9,498)	(10,247)	-	-	(19,745)
<b>Total Ending Balance</b>	-	-	<b>(\$9,498)</b>	<b>(\$10,247)</b>	-	-	<b>(\$19,745)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 032 - Above Standard Inflation

Cross Reference Name: Business Enterprises  
Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	12,466	-	-	-	-	-	12,466
<b>Total Revenues</b>	<b>\$12,466</b>	-	-	-	-	-	<b>\$12,466</b>
<b>Services &amp; Supplies</b>							
Instate Travel	1,725	-	-	-	-	-	1,725
Telecommunications	1,478	-	-	-	-	-	1,478
Data Processing	276	-	-	-	-	-	276
Other Services and Supplies	8,987	-	-	-	-	-	8,987
<b>Total Services &amp; Supplies</b>	<b>\$12,466</b>	-	-	-	-	-	<b>\$12,466</b>
<b>Total Expenditures</b>							
Total Expenditures	12,466	-	-	-	-	-	12,466
<b>Total Expenditures</b>	<b>\$12,466</b>	-	-	-	-	-	<b>\$12,466</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 090 - Analyst Adjustments

Cross Reference Name: Business Enterprises  
Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(90,552)	-	-	-	-	-	(90,552)
<b>Total Revenues</b>	<b>(\$90,552)</b>	-	-	-	-	-	<b>(\$90,552)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	(109,257)	-	-	48,117	-	-	(61,140)
Empl. Rel. Bd. Assessments	(45)	-	-	45	-	-	-
Public Employees' Retire Cont	(14,302)	-	-	6,298	-	-	(8,004)
Social Security Taxes	(8,358)	-	-	3,681	-	-	(4,677)
Worker's Comp. Assess. (WCD)	(54)	-	-	54	-	-	-
Flexible Benefits	(26,235)	-	-	26,235	-	-	-
Reconciliation Adjustment	67,699	-	-	(84,430)	-	-	(16,731)
<b>Total Personal Services</b>	<b>(\$90,552)</b>	-	-	-	-	-	<b>(\$90,552)</b>
<b>Total Expenditures</b>							
Total Expenditures	(90,552)	-	-	-	-	-	(90,552)
<b>Total Expenditures</b>	<b>(\$90,552)</b>	-	-	-	-	-	<b>(\$90,552)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 090 - Analyst Adjustments

Cross Reference Name: Business Enterprises  
 Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Total FTE</b>							
Total FTE							(0.50)
<b>Total FTE</b>	-	-	-	-	-	-	<b>(0.50)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 091 - Statewide Adjustment DAS Chgs

Cross Reference Name: Business Enterprises  
 Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(1,881)	-	-	-	-	-	(1,881)
Federal Funds	-	-	-	(6,070)	-	-	(6,070)
<b>Total Revenues</b>	<b>(\$1,881)</b>	-	-	<b>(\$6,070)</b>	-	-	<b>(\$7,951)</b>
<b>Services &amp; Supplies</b>							
Telecommunications	(1,881)	-	-	-	-	-	(1,881)
State Gov. Service Charges	-	-	(1,420)	(1,499)	-	-	(2,919)
Facilities Rental and Taxes	-	-	(5,804)	-	-	-	(5,804)
Other Services and Supplies	-	-	-	(4,571)	-	-	(4,571)
<b>Total Services &amp; Supplies</b>	<b>(\$1,881)</b>	-	<b>(\$7,224)</b>	<b>(\$6,070)</b>	-	-	<b>(\$15,175)</b>
<b>Total Expenditures</b>							
Total Expenditures	(1,881)	-	(7,224)	(6,070)	-	-	(15,175)
<b>Total Expenditures</b>	<b>(\$1,881)</b>	-	<b>(\$7,224)</b>	<b>(\$6,070)</b>	-	-	<b>(\$15,175)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	7,224	-	-	-	7,224
<b>Total Ending Balance</b>	-	-	<b>7,224</b>	-	-	-	<b>7,224</b>



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 092 - Statewide AG Adjustment

Cross Reference Name: Business Enterprises  
Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
Federal Funds	-	-	-	(1,655)	-	-	(1,655)
<b>Total Revenues</b>	-	-	-	<b>(\$1,655)</b>	-	-	<b>(\$1,655)</b>
<b>Services &amp; Supplies</b>							
Attorney General	-	-	(603)	(1,655)	-	-	(2,258)
<b>Total Services &amp; Supplies</b>	-	-	<b>(\$603)</b>	<b>(\$1,655)</b>	-	-	<b>(\$2,258)</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	(603)	(1,655)	-	-	(2,258)
<b>Total Expenditures</b>	-	-	<b>(\$603)</b>	<b>(\$1,655)</b>	-	-	<b>(\$2,258)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	603	-	-	-	603
<b>Total Ending Balance</b>	-	-	<b>\$603</b>	-	-	-	<b>\$603</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Commission for the Blind**  
**Pkg: 101 - WIOA and Employment First**

**Cross Reference Name: Business Enterprises**  
**Cross Reference Number: 58500-003-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(478,774)	-	-	-	-	-	(478,774)
Other Revenues	-	-	48,603	-	-	-	48,603
Federal Funds	-	-	-	385,167	-	-	385,167
<b>Total Revenues</b>	<b>(\$478,774)</b>	<b>-</b>	<b>\$48,603</b>	<b>\$385,167</b>	<b>-</b>	<b>-</b>	<b>(\$45,004)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	(159,037)	-	-	159,037	-	-	-
Empl. Rel. Bd. Assessments	(90)	-	-	90	-	-	-
Public Employees' Retire Cont	(24,306)	-	-	24,306	-	-	-
Social Security Taxes	(12,166)	-	-	12,166	-	-	-
Worker's Comp. Assess. (WCD)	(108)	-	-	108	-	-	-
Flexible Benefits	(52,470)	-	-	52,470	-	-	-
Reconciliation Adjustment	(142,528)	-	-	142,528	-	-	-
<b>Total Personal Services</b>	<b>(\$390,705)</b>	<b>-</b>	<b>-</b>	<b>\$390,705</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Services &amp; Supplies</b>							
Instate Travel	1,114	-	(5,454)	2,448	-	-	(1,892)
Out of State Travel	436	-	(343)	(93)	-	-	-
Employee Training	(1,093)	-	1,135	2,646	-	-	2,688
Office Expenses	-	-	1,636	5,441	-	-	7,077
Telecommunications	547	-	(2,141)	2,941	-	-	1,347
State Gov. Service Charges	(19,111)	-	5,643	1,086	-	-	(12,382)
Data Processing	(276)	-	1,625	5,708	-	-	7,057
Attorney General	-	-	(1,859)	1,859	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 101 - WIOA and Employment First

Cross Reference Name: Business Enterprises  
Cross Reference Number: 58500-003-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Dues and Subscriptions	-	-	100	(100)	-	-	-
Facilities Rental and Taxes	(24,495)	-	17,841	(18,718)	-	-	(25,372)
Fuels and Utilities	-	-	168	594	-	-	762
Facilities Maintenance	-	-	301	1,065	-	-	1,366
Agency Program Related S and S	(18,917)	-	81,563	(62,646)	-	-	-
Other Services and Supplies	(10,949)	-	3,458	1,761	-	-	(5,730)
Expendable Prop 250 - 5000	(10,511)	-	2,200	5,958	-	-	(2,353)
IT Expendable Property	(4,814)	-	1,269	4,655	-	-	1,110
<b>Total Services &amp; Supplies</b>	<b>(\$88,069)</b>	-	<b>\$107,142</b>	<b>(\$45,395)</b>	-	-	<b>(\$26,322)</b>
<b>Total Expenditures</b>							
Total Expenditures	(478,774)	-	107,142	345,310	-	-	(26,322)
<b>Total Expenditures</b>	<b>(\$478,774)</b>	-	<b>\$107,142</b>	<b>\$345,310</b>	-	-	<b>(\$26,322)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(58,539)	39,857	-	-	(18,682)
<b>Total Ending Balance</b>	-	-	<b>(\$58,539)</b>	<b>\$39,857</b>	-	-	<b>(\$18,682)</b>

01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:003-00-00 Business Enterprises

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

2017-19  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 090 - Analyst Adjustments

POSITION NUMBER CLASS COMP CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0800004 OAS C0860 AP PROGRAM ANALYST 1	1-	1.00-	24.00-	08	5,095.00	122,280- 58,823-				122,280- 58,823-
0800004 OAS C0860 AP PROGRAM ANALYST 1	1	.50	12.00	08	5,095.00	13,023 9,829		48,117 36,313		61,140 46,142
TOTAL PICS SALARY						109,257-		48,117		61,140-
TOTAL PICS OPE						48,994-		36,313		12,681-
TOTAL PICS PERSONAL SERVICES =		.50-	12.00-			158,251-		84,430		73,821-

01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:003-00-00 Business Enterprises

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

2017-19

PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 101 - WIOA and Employment First

POSITION NUMBER CLASS COMP CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	PF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0800005 OAS C0860 AP PROGRAM ANALYST 1	1-	1.00-	24.00-	09	5,343.00	128,232- 60,058-				128,232- 60,058-
0800005 OAS C0860 AP PROGRAM ANALYST 1	1	1.00	24.00	09	5,343.00	27,313 12,793		100,919 47,265		128,232 60,058
0800006 MENNZ0118 AA EXECUTIVE SUPPORT SPECIALIST 1	1-	1.00-	24.00-	03	3,077.00	73,848- 53,209-				73,848- 53,209-
0800006 MENNZ0118 AA EXECUTIVE SUPPORT SPECIALIST 1	1	1.00	24.00	03	3,077.00	15,730 11,334		58,118 41,875		73,848 53,209
TOTAL PICS SALARY						159,037-		159,037		
TOTAL PICS OPE						89,140-		89,140		
TOTAL PICS PERSONAL SERVICES =		.00	.00			248,177-		248,177		

**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

Commission for the Blind  
2017-19 Biennium

Agency Number: 58500  
Cross Reference Number: 58500-003-00-00-00000

<i>Source</i>	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
<b>Other Funds</b>						
Other Revenues	-	225,060	422,593	340,037	340,037	-
Transfer In - Intrafund	414,143	-	-	-	-	-
Transfer Out - Intrafund	(180,772)	-	-	-	-	-
<b>Total Other Funds</b>	<b>\$233,371</b>	<b>\$225,060</b>	<b>\$422,593</b>	<b>\$340,037</b>	<b>\$340,037</b>	<b>-</b>
<b>Federal Funds</b>						
Federal Funds	990,371	523,100	3,779,298	2,512,150	2,504,425	-
<b>Total Federal Funds</b>	<b>\$990,371</b>	<b>\$523,100</b>	<b>\$3,779,298</b>	<b>\$2,512,150</b>	<b>\$2,504,425</b>	<b>-</b>

# DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Source	Fund	ORBITS Revenue Acct	2013-2015 Actual	2015-17 Legislatively Adopted	2015-17 Estimated	2017-19		
						Agency Request	Governor's	Legislatively Adopted
<u>Business Enterprise</u>								
<u>58500-003-00-00-00000</u>								
Charges for Services	OF	0410	0	0	0	0	0	
Interest Income	OF	0605	0	0	0	0	0	
Sales Income	OF	0705	0	0	0	0	0	
Donations	OF	0905	0	0	0	0	0	
Other Revenue	OF	0975	0	225,060	422,593	340,037	340,037	
Transfers In – Intrafund	OF	1010	414,143	0	0	0	0	
Transfers Out – Intrafund	OF	2010	(180,772)	0	0	0	0	
<b>TOTAL OTHER FUNDS</b>			233,371	225,060	422,593	340,037	340,037	
Federal Funds	FF	0995	990,371	523,100	3,779,298	2,512,150	2,504,425	
<b>TOTAL FEDERAL FUNDS</b>			990,371	523,100	3,779,298	2,512,150	2,504,425	

\_\_\_\_\_ Agency Request

\_\_\_X\_\_\_ Governor's Budget

\_\_\_\_\_ Legislatively Adopted

Budget Page \_\_\_\_\_


# Budget Narrative

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## ORIENTATION & CAREER CENTER FOR THE BLIND



# Budget Narrative

 Oregon Commission for the Blind  
Training Program Unit  
Agency Requested Budget 2017-19 (12.6 FTE)

Oregon Commission for the Blind

Executive Director

OCCB Director  
1 FTE

Rehab Instructors  
10.6 FTE

Info Systems  
Specialist 3  
1 FTE

# Budget Narrative

 Oregon Commission for the Blind  
Training Program Unit  
Governor's Budget 2017-19 (11.0 FTE)

Oregon Commission for the Blind

Executive Director

OCCB Director  
1 FTE

Rehab Instructors  
9.0 FTE

Info Systems  
Specialist 3  
1 FTE

Daily Living  
Instructor  
(1.0 FTE)

Manual Art  
Instructor  
(0.6 FTE)

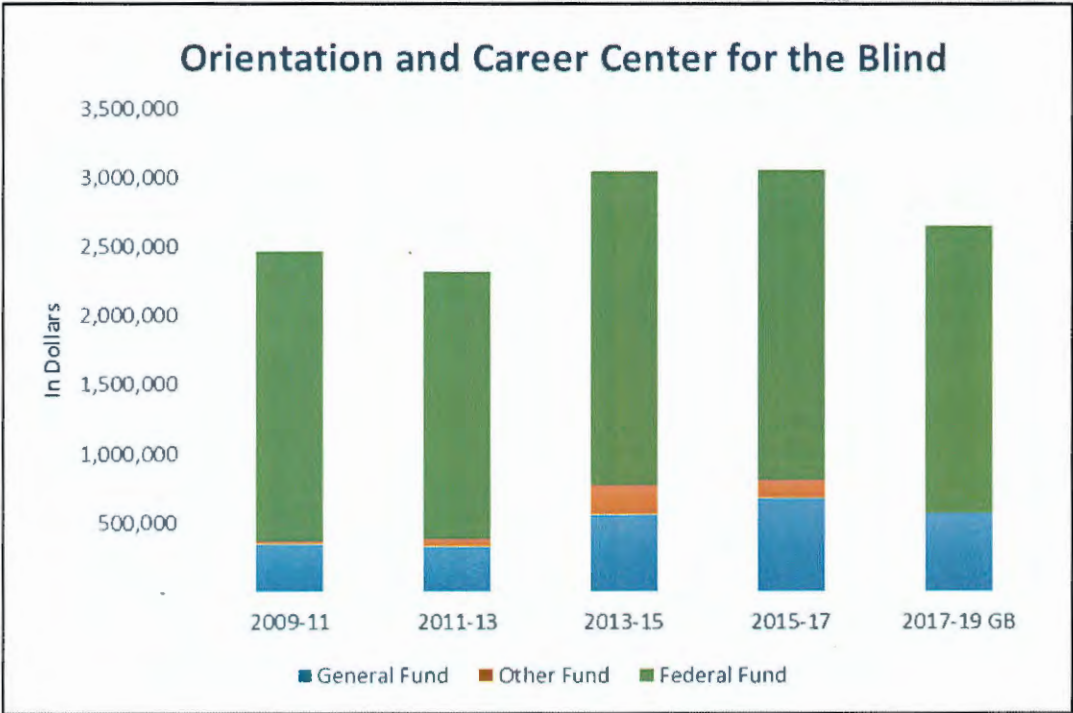
*\* Not Included in Governor's Budget*

# Budget Narrative

## Orientation and Career Center for the Blind Program Unit Executive Summary

Program Contact:

Jason Clary, 971-673-1588  
jason.clary@state.or.us



# Budget Narrative

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## Program Overview

The Orientation and Career Center for the Blind (OCCB) is a highly specialized training program for Oregonians who experience blindness. It provides the intensive skills training needed by individuals who are blind in order for them to accomplish tasks previously done visually. The OCCB training facilities and staff are primarily located in Portland, Oregon. However, to meet the immense and growing need for adaptive equipment/technology training, the program also has satellite labs located in Salem, Eugene and Medford. The OCCB training program directly impacts the economic viability of Oregon by increasing the self-sufficiency of Oregonians with vision loss. The program enhances Oregon's workforce by providing individuals with vision loss the training and tools they need in order to live independent, productive and prosperous lives. Oregonians who experience vision loss are at high risk of being dependent on social services and economic supports. However, when citizens with vision loss have access to the skilled, specialized rehabilitation instruction available at the OCCB, they are able to become employed, independent and active participants in their communities and society as a whole.

## Program Funding Request

The Requested Budget for the Orientation and Career Center for the Blind Program Unit, with corresponding performance projections, is summarized below.

	<b>2017-19 GB</b>	<b>2019-21</b>	<b>2021-2023</b>	<b>2023-25</b>
General Fund	568,751	585,245	602,217	619,681
Other Fund	1,064	1,095	1,127	1,160
Federal Fund	2,088,338	2,148,900	2,211,218	2,275,343
Total Funds	2,658,153	2,735,240	2,814,562	2,896,184

## Budget Narrative

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### Program Description

The OCCB is the only training program in Oregon with the specialized staff and adaptive training facilities necessary for assessing and training individuals who experience blindness in the skills they need to live, work and thrive. It is the primary and most essential training resource utilized by the agency's Vocational Rehabilitation Program. All referrals to the program come via Vocational Rehabilitation Counselors throughout the state. Training for each client is designed around their individualized assessment, the plan they have developed with their vocational counselor and their unique needs as they evolve during their instruction at the OCCB. Assessment and training at the OCCB is blindness specific and subjects include but are not limited to: adaptive technology (e.g. screen-reading software, optical character recognition, magnification hardware/software and refreshable braille displays), adjustment to blindness, Braille reading/writing, Apple and Android devices, low vision aids/techniques, orientation and mobility (white cane travel/transportation training), techniques of daily living, cooking, wood shop, personal/organizational management, job skill/aptitude, and Career preparation.

It is important to recognize that the agency's OCCB and Vocational Rehabilitation Program work hand-in-hand in order to holistically address the employment needs of Oregonians with vision loss. Neither program can fully address the needs of this diverse population without combining and thus maximizing supports, guidance and training services. It is the agency's goal, through the combined efforts of both of these programs, to move our clients towards the prosperity our Governor desires for all Oregonians.

OCCB referral sources/partners are as follows:

Education Partners – The OCCB works with the school system to provide referred high school students the opportunity to participate in our Summer Work Experience Program (SWEP). SWEP is designed to provide students with paid work experience, exposure to college preparation and independent living skills. Youth who are preparing to exit school begin to focus on planning for a smooth transition to work and life after high school.

## Budget Narrative

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Other State/Government Programs – Individuals seeking supports or accessing other public agency services who would benefit from services from our agency are referred to us for training and support to maximize their independence and employment opportunities. Likewise, we refer our clients to other agencies as we identify needs that cannot fully be addressed via our blindness specific services.

Non-profits/Contractors – Understanding that not all services/tools required in the unique situations of our clients can be met by agency programs, the agency regularly contracts with and/or partners with outside entities to provide clients with holistic, integrated and multifaceted rehabilitation and training opportunities.

Medical Providers – As providers throughout the state discover and inform individuals about their visual conditions (often a very sensitive/emotional time for those with new vision loss), they also refer these clients to the agency for support in maintaining their independence and employment.

### **Cost Drivers**

In this program the cost drivers are directly associated with the demand for services. Costs are included in two main categories: Personal Services for qualified, specialized staff; and special payments for adaptive equipment, devices and training.

Technology Training and Devices – One of the more costly and most frequently requested training services at the OCCB is technology and adaptive equipment. Given the ever advancing changes in technology, jobs are becoming increasingly more and more possible for people to perform without vision. In essence, technology is the key to employment for most persons with vision loss.

Orientation And Mobility Training – Another high need training area within the OCCB is Orientation and Mobility (O&M) training. O&M is an essential skillset that allows persons with vision loss to travel safely and independently using a white cane to navigate their homes, communities and work places. This requires intensive training that takes numerous hours of instruction for full mastery.

# Budget Narrative

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## **Program Justification**

The Orientation and Career Center for the Blind Program is directly aligned with the following priorities established by Governor Brown:

### ***A Seamless System of Education and Workforce Training***

Oregonians who are blind work with the Commission for the Blind's specialized vocational rehabilitation counseling and teaching professionals to build and implement individualized plans for employment consistent with their unique strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice.

### ***A Thriving Statewide Economy for all Oregonians***

Vocational rehabilitation at the Commission for the Blind is about helping individuals who are blind and want to gain or retain employment to acquire the necessary adaptive skills for full participation in the workforce. In order for Oregonians who are blind to fully participate in the economic recovery, they need access to training, technology and other related vocational rehabilitation services. It is also critical that there be employers who want to hire qualified individuals with disabilities in order to enhance and diversify their workforce. We are committed to being an agency that leads by example and have many employees who are blind who are working at all levels of the organization.



## Budget Narrative

### Program Performance



	FFY 2011	FFY 2012	FFY 2013	FFY 2014	FFY 2015
Clients Served	305	345	340	410	425
Client Satisfaction	95.7%	100.0%	100.0%	95.0%	92.0%
Services Timeliness Rating	97.10%	100%	84.40%	90.4%	89.8%

### Enabling Legislation/Program Authorization

This program is authorized by Federal Law establishing vocational rehabilitation programs specializing in serving individuals who are blind. The Workforce Innovation and Opportunity Act of 2014, PL 113-128 and ORS 346.110-346.250.



# Budget Narrative

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## **Funding Streams**

Oregon Commission for the Blind's funding stream is through the U. S. Department of Education. It is a formula-based budget with matching and maintenance of effort requirements. The federal law outlines that the funds are protected for the sole purpose of the designated state agency with an approved state plan to administer services under federal law.

The agency receives the majority of its resources from the Federal Rehabilitation Services Administration of the U.S. Department of Education that require a state/other match contribution. The match rate for the vocational rehabilitation program is essentially 4:1 federal to state/other dollars.

Sources of match include:

- General fund

- Cooperative Agreements with educational partners

## **Changes from 2015-17 Approved Budget**

With the consolidation of direct service support position into Administrative Services Program Unit to support the implementation of the Workforce Innovation and Opportunity Act (WIOA), the support positions have been moved from the Orientation and Career Center for the Blind. The supportive roles and responsibilities will continue just with a single administrative reporting structure.

# Budget Narrative

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## Program Unit Narrative

### Activities, Programs, and Issues

The Orientation and Career Center for the Blind (OCCB) is an in-house program to address clients' individual skill needs in a comprehensive, coordinated, and efficient manner. Most of OCCB's participants are people who have become blind in adulthood and must learn new ways of doing everyday activities such as reading, food preparation and traveling. The agency's Vocational Rehabilitation Counselors refer clients from throughout the state to OCCB. The clients come to OCCB, which is located at the Portland headquarters, for up to several months in order to learn the skills that are necessary for them to be independent and pursue employment goals. These clients pursue training while living in an apartment near the Center. Clients who live in the Portland metropolitan area continue to live at home and commute to OCCB or receive services in their home. Because of this central training site, we are able to provide statewide services with a small staff and provide people who live in rural settings with the same quality of services that people in metropolitan areas receive.

The customers of OCCB are:

- Blind Oregonians who require extensive training in adaptive skills to be work ready.
- Blind Oregonians who are interested in and can benefit from more intensive training in independent living skills.
- Vocational Rehabilitation Counselors who refer clients to OCCB for specific training in order for them to gain confidence and become ready to enter employment.
- Businesses that are seeking qualified applicants, information and assistance with job modifications, adaptive technology; information about hiring persons with vision loss, and information on ADA compliance.
- Families of OCCB clients. The Center strives to provide clients with the opportunity to include their families in

## Budget Narrative

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their training programs through adjustment to blindness seminars, support groups, and open houses.

### **OCCB Services**

**Adjustment to Blindness:** Having clients come together in a residential program has the advantage of providing the clients with visually impaired peers with whom they can problem solve and receive support. OCCB facilitates this process through a Challenge Course, support groups, recreational activities and family involvement. Often clients from rural areas have had no other contact with a person who is blind prior to coming to the center.

**Low Vision Assessments:** Use of magnifiers and other technology to utilize remaining vision to the greatest advantage.

**Orientation & Mobility:** Using field training and public transportation, qualified teachers instruct clients on how to travel using a white cane, guide dog for the blind, or other adaptation. Clients also learn to utilize public transportation and address specific travel needs they may have related to employment.

**Vocational Counseling & Evaluation:** This program evaluates and identifies clients' vocational strengths, interests, abilities, aptitudes, job readiness and transferable skills. Recommendations are made for vocational planning based on evaluation outcomes. Goal setting classes are also facilitated.

**Braille Training:** For those who are not able to utilize vision for reading or whose eye condition is progressive to the degree that they will not be able to effectively access print.

**Adaptive Devices Training:** Today, adaptive devices range from the traditional braille note takers and specialized blindness devices for identifying money, objects, scanning print documents, to using off-the-shelf devices like the Apple iPhone, iPad or iPod Touch and Android tablets and phones. The Apple and Android devices have built-in speech output and/or magnification that allow a visually impaired person to have access to the same variety of reading materials and information as their sighted coworkers, family and friends, giving them access to most reading

## Budget Narrative

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material and information so they can compete on an equal footing. These devices have apps that replace many of the more expensive specialized blindness devices making them an extremely cost effective alternative.

**Technology Center:** A state-of-the-art computer training center demonstrating and training clients on technology which can level the playing field for blind job seekers. This technology includes enlarged print on computer screens, "talking" computers, and supplemental keyboards that display the screen in Braille. The Commission's technology center is one of a very few technology resources for blind people in the Pacific Northwest.

**Woodshop:** Clients develop confidence in their abilities as blind people and their ability to complete a tangible project through this program. Often this service is cited by clients as being a crossroad where they realized they could accomplish any of their goals through adaptive techniques.

**Meal Prep:** Food preparation and planning, organization of kitchen items, grocery shopping and other skills necessary to successfully remain independent are addressed in this class. Through learning these techniques, clients also become able to organize other areas of their life through adaptation and engage in the activities that they enjoyed prior to their vision loss.

**Techniques of Daily Living:** This class is designed to teach clients independent living skills which they have identified as barriers to living independently in their homes and/or being employed. Classes are taught one on one and geared to the type of learning most useful for the client - such as auditory or kinesthetic. Types of skills which may be taught include: use of washer/dryer and clothing care and management; personal hygiene; cleaning - such as vacuuming, cleaning bathroom, sweeping, mopping, etc.; organizing and identifying medications and many other skills.

### Trends in Caseload and Workload Measures

The number of clients receiving services from the Orientation Center increased steadily for many years. The number of residential students is restricted by space and teaching time. The Technology Center has had an even

## Budget Narrative

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greater increase than the rest of the Center. The number of students referred and the number of training hours provided maximize the resources of staff.

### **Expected Results and Benchmarks**

Services provided in this program are key to an individual gaining the skills needed to prepare for employment and relate directly to the success rate of the Vocational Rehabilitation program.

### **Revenue Sources and Proposed Changes**

See Revenue Forecast Narrative under “Revenues” tab

## Budget Narrative

### Essential and Policy Packages and Fiscal Impact Summary

The current service level through agency request budget showing expenditures by fund type, position and full-time equivalent positions for the Orientation and Career Center for the Blind Program Unit is displayed in the following table.

	2017-19 Current Service Level	Package 070 Revenue Shortfall	Package 101 WIOA Implementation	2017-19 Agency Request Budget	Package 91-93 Analyst Rec	2017-19 Governor's Budget
General Fund	842,717	-	(157,570)	685,147	(116,396)	568,751
Other Fund	131,172	-	(130,108)	1,064		1,064
Federal Fund	2,739,905	(200,000)	(2,836)	2,537,069	(448,731)	2,088,338
<b>Total Funds</b>	<b>3,713,794</b>	<b>(200,000)</b>	<b>(290,514)</b>	<b>3,223,280</b>	<b>(565,127)</b>	<b>2,658,153</b>
Positions	16	-	(2)	14	(2)	12
FTE	14.10	-	(1.50)	12.60	(1.60)	11.00

### *Essential Packages*

#### 010 Non-PICS Psnl Svc / Vacancy Factor

##### Package Description

Provide allowances for non-PICS personal services budget items and to reflect savings from anticipated staff turnover. This package is based on vacancy experience, costs or temporary services and other items.

## Budget Narrative

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Adjustments from base budget total (\$40,932) ((\$28,587) Federal Funds, (\$12,057) General Fund, and (\$288) Other Funds).

### **031 Standard Inflation**

#### **Package Description**

Allows for a general inflation factor that applies to most Services and Supplies and non-PICS Personal Services costs, Capital Outlay and Come Special Payments. It also allows inflation at published rates for State Government Service Charges, uniform and non-uniform rent, various assessments and other items. It also includes the standard portion (3.7%) of medial cost increases, non-state employee personnel costs, as applied to Special Payments and usage-based Price List items.

Adjustments from base budget total \$72,379 (\$33,805 Federal Funds, \$33,934 General Funds, and \$4,640 Other Funds).

### **032 Above Standard Inflation**

#### **Package Description**

This package includes the amount above, not including standard inflation, for a limited number of expenditure types. For this program unit, the non-standard inflation relates to professional services.

Adjustments from base budget total \$37,965 (All General Fund).

# Budget Narrative

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## *Policy Packages*

### **070 Revenue Shortfalls**

#### **Package Description**

The Vocational Rehabilitation federal grant is a capped grant, and the funds are awarded on a state level. The Commission for the Blind and the general agency Vocational Rehabilitation within the Department of Human Services split the statewide grant. The Commission for the Blind currently receives 12.5% of the VR grant. Having been at this split percentage for many years, expenditures are now projected to exceed federal revenue.

#### **How Achieved**

Special Payments (Vocational Rehabilitation program client service payment) will be cut by approximately \$200,000.

Total reductions for this program unit is \$200,000 Federal Funds.

#### **Staffing Impact**

There is no staffing impact.

### **101 Workforce Investment and Opportunities Act (WIOA) Implementation**

#### **Related Legislation**

Workforce Innovation and Opportunity Act of 2014.

#### **Purpose**

The Workforce Innovation and Opportunity Act (WIOA), represents the first major reform of the public workforce system in more than 15 years. Achieving WIOA's ambitious goals required significant changes to workforce development programs, including improved collaboration across agencies, workforce boards, employers, and educational institutions; a greater focus on outcomes and efficiency; and better engagement with job seekers and



## Budget Narrative

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employers. In order to make the necessary changes required under WIOA, the agency infrastructure has to expand to address all of the requirements under WIOA. This POP is designed to enhance the VR program and service delivery system to achieve a higher level of collaboration, partnership, outcomes and opportunities for Oregonians who are blind as expected by WIOA. These positions will create and maintain policy and infrastructure changes needed to support WIOA, provide training to staff, quality assurance, add partnerships, and add employment retention and sustainability to the service delivery model.

### **Detail Plan**

The Orientation and Career Center for the Blind Program unit is impacted by the move of two positions, 1.50 FTE, of direct service support and the redistribution of expenditures to support the restructure. See How Achieved section below.

### **How Achieved**

Policy Option Package 101 is funded by the Vocational Rehabilitation Basic 110 grant increase in split for the statewide grant award, increased from 12.5% to 15.6%, the national average for blind agencies. Expenditures were adjusted within each program unit as positions were moved to accommodate the new support structure. All expenditure lines were reviewed for appropriate fund splits and adjustments were made between program units. All positions funding splits with PICS were reviewed and adjusted to match current funding streams within each program unit. As a result, the majority of the match requirement for the increase in federal funds was met within the current budget.

Fiscal impact by program unit is as follows:

## Budget Narrative

	GF	OF	FF	TF	Pos.	FTE
<b>Revenue</b>	<b>(350)</b>	<b>259,194</b>	<b>2,536,574</b>	<b>2,795,418</b>		
Administrative Services	714,932	(20,704)	1,153,715	1,847,943	11	11.00
Rehabilitation Services Program	118,399	375,640	1,329,033	1,823,072	1	5.39
Business Enterprise Program	(478,774)	107,142	345,310	(26,322)	-	-
Orientation and Career Center Program	(157,570)	(130,108)	(2,836)	(290,514)	(2)	(1.50)
Independent Living Services Program	(197,337)	-	(288,648)	(485,985)	-	(2.50)
<b>Expenditures</b>	<b>(350)</b>	<b>331,970</b>	<b>2,536,574</b>	<b>2,868,194</b>	<b>10</b>	<b>12.39</b>

### Staffing

Rehabilitation Assistant (OS2) – 2.0 positions, 1.50 FTE, moved to Administrative Services Program Unit.

### 091 Analyst Recommendations

#### Activities of Daily Living Instructor (1.0 FTE)

This reduction alters the agency's training center program for adjustment to blindness that support individuals who are grieving and going through the process of adjustment to vision loss. The position largely is focused on low vision assessments and training for individuals who have some level of usable vision that need adaptive tools and devices in order to optimize their ability to perform various work and independence related tasks. This position serves both vocational rehabilitation and independent living clients. In addition, this position provides training and assessment in daily living skills and stamina. The responsibilities of this position would be shifted to other remaining positions, which would reduce the amount of time and resources that we could commit to these subject areas. We would also be required to contract for required low vision assessments and training which would further constrain our special payment to client resources.

## Budget Narrative

### Manual Arts Instructor (0.60 FTE)

This position was included in permanent finance plan that was pending action at the time of the Governor's Budget. This position remains vacant, as we have utilized the vacancy savings to increase position number 0709006 from half-time to full time. If this position is eliminated, the net result would be a decrease in technology assessment and training services for vocational rehabilitation clients. Technology assessment and training is a fundamental requisite to being able to successfully obtain and maintain employment for Oregonians who are blind.

### Special Payments

Reduces resources to purchase training, equipment, etc., for clients in the vocational rehabilitation program. A reduction in special payments could result in insufficient resources to serve all eligible Oregonians who are blind. When the agency has insufficient resources to serve all clients, we are required to enter into an Order of Selection, which is a prioritized wait list process that requires clients with the most service needs and highest level of barriers to employment receive services first. This will delay service times and employment outcomes for Oregonians who are blind.

Expenditures by Category	GF	OF	FF	TF	Pos.	FTE
Personal Services	(56,064)	-	(236,611)	(292,675)	(2)	(1.50)
Services & Supplies	-	-	-	-		
Capital Outlay	-	-	-	-		
Special Payments	(53,781)	-	(198,712)	(252,493)		
<b>Total Expenditures</b>	<b>(109,845)</b>	<b>-</b>	<b>(435,323)</b>	<b>(545,168)</b>	<b>(2)</b>	<b>(1.50)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Orientation Cntr for the Blind  
 Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(12,057)	-	-	-	-	-	(12,057)
Other Revenues	-	-	-	-	-	-	-
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>(\$12,057)</b>	-	-	-	-	-	<b>(\$12,057)</b>
<b>Personal Services</b>							
Temporary Appointments	-	-	27	426	-	-	453
Overtime Payments	-	-	6	28	-	-	34
All Other Differential	-	-	-	-	-	-	-
Public Employees' Retire Cont	-	-	1	5	-	-	6
Pension Obligation Bond	4,994	-	-	20,508	-	-	25,502
Social Security Taxes	-	-	2	35	-	-	37
Mass Transit Tax	869	-	(324)	-	-	-	545
Vacancy Savings	(17,920)	-	-	(49,589)	-	-	(67,509)
<b>Total Personal Services</b>	<b>(\$12,057)</b>	-	<b>(\$288)</b>	<b>(\$28,587)</b>	-	-	<b>(\$40,932)</b>
<b>Total Expenditures</b>							
Total Expenditures	(12,057)	-	(288)	(28,587)	-	-	(40,932)
<b>Total Expenditures</b>	<b>(\$12,057)</b>	-	<b>(\$288)</b>	<b>(\$28,587)</b>	-	-	<b>(\$40,932)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	288	28,587	-	-	28,875
<b>Total Ending Balance</b>	-	-	<b>\$288</b>	<b>\$28,587</b>	-	-	<b>\$28,875</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Commission for the Blind**  
**Pkg: 031 - Standard Inflation**

**Cross Reference Name: Orientation Cntr for the Blind**  
**Cross Reference Number: 58500-005-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	33,934	-	-	-	-	-	33,934
Other Revenues	-	-	-	-	-	-	-
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>\$33,934</b>	-	-	-	-	-	<b>\$33,934</b>
<b>Services &amp; Supplies</b>							
Instate Travel	-	-	-	379	-	-	379
Out of State Travel	-	-	-	221	-	-	221
Employee Training	-	-	4	508	-	-	512
Office Expenses	-	-	-	265	-	-	265
Telecommunications	-	-	1	798	-	-	799
State Gov. Service Charges	29,697	-	-	-	-	-	29,697
Data Processing	16	-	20	401	-	-	437
Publicity and Publications	-	-	-	124	-	-	124
Professional Services	-	-	29	13	-	-	42
IT Professional Services	-	-	-	-	-	-	-
Attorney General	88	-	-	358	-	-	446
Employee Recruitment and Develop	-	-	-	41	-	-	41
Dues and Subscriptions	8	-	-	41	-	-	49
Facilities Rental and Taxes	3,785	-	-	12,854	-	-	16,639
Fuels and Utilities	-	-	8	124	-	-	132
Facilities Maintenance	-	-	-	159	-	-	159
Agency Program Related S and S	-	-	132	710	-	-	842
Other Services and Supplies	239	-	208	649	-	-	1,096
Expendable Prop 250 - 5000	101	-	372	277	-	-	750

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 031 - Standard Inflation

Cross Reference Name: Orientation Cntr for the Blind  
Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
IT Expendable Property	-	-	-	-	-	-	-
<b>Total Services &amp; Supplies</b>	<b>\$33,934</b>	-	<b>\$774</b>	<b>\$17,922</b>	-	-	<b>\$52,630</b>
<b>Capital Outlay</b>							
Data Processing Software	-	-	-	-	-	-	-
Data Processing Hardware	-	-	-	-	-	-	-
<b>Total Capital Outlay</b>	-	-	-	-	-	-	-
<b>Special Payments</b>							
Other Special Payments	-	-	3,866	15,883	-	-	19,749
<b>Total Special Payments</b>	-	-	<b>\$3,866</b>	<b>\$15,883</b>	-	-	<b>\$19,749</b>
<b>Total Expenditures</b>							
Total Expenditures	33,934	-	4,640	33,805	-	-	72,379
<b>Total Expenditures</b>	<b>\$33,934</b>	-	<b>\$4,640</b>	<b>\$33,805</b>	-	-	<b>\$72,379</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(4,640)	(33,805)	-	-	(38,445)
<b>Total Ending Balance</b>	-	-	<b>(\$4,640)</b>	<b>(\$33,805)</b>	-	-	<b>(\$38,445)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 032 - Above Standard Inflation

Cross Reference Name: Orientation Cntr for the Blind  
Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	37,965	-	-	-	-	-	37,965
<b>Total Revenues</b>	<b>\$37,965</b>	-	-	-	-	-	<b>\$37,965</b>
<b>Services &amp; Supplies</b>							
Instate Travel	922	-	-	-	-	-	922
Telecommunications	2,605	-	-	-	-	-	2,605
Data Processing	4,441	-	-	-	-	-	4,441
Other Services and Supplies	29,997	-	-	-	-	-	29,997
<b>Total Services &amp; Supplies</b>	<b>\$37,965</b>	-	-	-	-	-	<b>\$37,965</b>
<b>Total Expenditures</b>							
Total Expenditures	37,965	-	-	-	-	-	37,965
<b>Total Expenditures</b>	<b>\$37,965</b>	-	-	-	-	-	<b>\$37,965</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 070 - Revenue Shortfalls

Cross Reference Name: Orientation Cntr for the Blind  
Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Special Payments</b>							
Other Special Payments	-	-	-	(200,000)	-	-	(200,000)
<b>Total Special Payments</b>	-	-	-	<b>(\$200,000)</b>	-	-	<b>(\$200,000)</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	-	(200,000)	-	-	(200,000)
<b>Total Expenditures</b>	-	-	-	<b>(\$200,000)</b>	-	-	<b>(\$200,000)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	200,000	-	-	200,000
<b>Total Ending Balance</b>	-	-	-	<b>\$200,000</b>	-	-	<b>\$200,000</b>



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 090 - Analyst Adjustments

Cross Reference Name: Orientation Cntr for the Blind  
Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(109,845)	-	-	-	-	-	(109,845)
Federal Funds	-	-	-	(435,323)	-	-	(435,323)
<b>Total Revenues</b>	<b>(\$109,845)</b>	<b>-</b>	<b>-</b>	<b>(\$435,323)</b>	<b>-</b>	<b>-</b>	<b>(\$545,168)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	(35,392)	-	-	(150,757)	-	-	(186,149)
Empl. Rel. Bd. Assessments	(22)	-	-	(92)	-	-	(114)
Public Employees' Retire Cont	(4,633)	-	-	(19,734)	-	-	(24,367)
Social Security Taxes	(2,708)	-	-	(11,533)	-	-	(14,241)
Worker's Comp. Assess. (WCD)	(27)	-	-	(111)	-	-	(138)
Flexible Benefits	(13,095)	-	-	(53,577)	-	-	(66,672)
Reconciliation Adjustment	(187)	-	-	(807)	-	-	(994)
<b>Total Personal Services</b>	<b>(\$56,064)</b>	<b>-</b>	<b>-</b>	<b>(\$236,611)</b>	<b>-</b>	<b>-</b>	<b>(\$292,675)</b>
<b>Services &amp; Supplies</b>							
State Gov. Service Charges	-	-	-	-	-	-	-
<b>Total Services &amp; Supplies</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Special Payments</b>							
Other Special Payments	(53,781)	-	-	(198,712)	-	-	(252,493)
<b>Total Special Payments</b>	<b>(\$53,781)</b>	<b>-</b>	<b>-</b>	<b>(\$198,712)</b>	<b>-</b>	<b>-</b>	<b>(\$252,493)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 090 - Analyst Adjustments

Cross Reference Name: Orientation Cntr for the Blind  
Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Total Expenditures</b>							
Total Expenditures	(109,845)	-	-	(435,323)	-	-	(545,168)
<b>Total Expenditures</b>	<b>(\$109,845)</b>	-	-	<b>(\$435,323)</b>	-	-	<b>(\$545,168)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-
<b>Total Positions</b>							
Total Positions							(2)
<b>Total Positions</b>	-	-	-	-	-	-	<b>(2)</b>
<b>Total FTE</b>							
Total FTE							(1.60)
<b>Total FTE</b>	-	-	-	-	-	-	<b>(1.60)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 091 - Statewide Adjustment DAS Chgs

Cross Reference Name: Orientation Cntr for the Blind  
 Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(6,501)	-	-	-	-	-	(6,501)
Federal Funds	-	-	-	(13,205)	-	-	(13,205)
<b>Total Revenues</b>	<b>(\$6,501)</b>	<b>-</b>	<b>-</b>	<b>(\$13,205)</b>	<b>-</b>	<b>-</b>	<b>(\$19,706)</b>
<b>Services &amp; Supplies</b>							
State Gov. Service Charges	(3,874)	-	-	(4,421)	-	-	(8,295)
Other Services and Supplies	(2,627)	-	-	(8,784)	-	-	(11,411)
<b>Total Services &amp; Supplies</b>	<b>(\$6,501)</b>	<b>-</b>	<b>-</b>	<b>(\$13,205)</b>	<b>-</b>	<b>-</b>	<b>(\$19,706)</b>
<b>Total Expenditures</b>							
Total Expenditures	(6,501)	-	-	(13,205)	-	-	(19,706)
<b>Total Expenditures</b>	<b>(\$6,501)</b>	<b>-</b>	<b>-</b>	<b>(\$13,205)</b>	<b>-</b>	<b>-</b>	<b>(\$19,706)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 092 - Statewide AG Adjustment

Cross Reference Name: Orientation Cntr for the Blind  
Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(50)	-	-	-	-	-	(50)
Federal Funds	-	-	-	(203)	-	-	(203)
<b>Total Revenues</b>	<b>(\$50)</b>	<b>-</b>	<b>-</b>	<b>(\$203)</b>	<b>-</b>	<b>-</b>	<b>(\$253)</b>
<b>Services &amp; Supplies</b>							
Attorney General	(50)	-	-	(203)	-	-	(253)
<b>Total Services &amp; Supplies</b>	<b>(\$50)</b>	<b>-</b>	<b>-</b>	<b>(\$203)</b>	<b>-</b>	<b>-</b>	<b>(\$253)</b>
<b>Total Expenditures</b>							
Total Expenditures	(50)	-	-	(203)	-	-	(253)
<b>Total Expenditures</b>	<b>(\$50)</b>	<b>-</b>	<b>-</b>	<b>(\$203)</b>	<b>-</b>	<b>-</b>	<b>(\$253)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Commission for the Blind**  
**Pkg: 101 - WIOA and Employment First**

**Cross Reference Name: Orientation Cntr for the Blind**  
**Cross Reference Number: 58500-005-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(157,570)	-	-	-	-	-	(157,570)
Other Revenues	-	-	1,064	-	-	-	1,064
Federal Funds	-	-	-	(1,599)	-	-	(1,599)
<b>Total Revenues</b>	<b>(\$157,570)</b>	<b>-</b>	<b>\$1,064</b>	<b>(\$1,599)</b>	<b>-</b>	<b>-</b>	<b>(\$158,105)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	(116,604)	-	-	(11,616)	-	-	(128,220)
Empl. Rel. Bd. Assessments	(76)	-	-	(38)	-	-	(114)
Public Employees' Retire Cont	(15,301)	-	-	(1,482)	-	-	(16,783)
Social Security Taxes	(8,919)	-	-	(889)	-	-	(9,808)
Worker's Comp. Assess. (WCD)	(90)	-	-	(48)	-	-	(138)
Mass Transit Tax	(314)	-	-	-	-	-	(314)
Flexible Benefits	(44,274)	-	-	(22,398)	-	-	(66,672)
Reconciliation Adjustment	6,252	-	-	(6,252)	-	-	-
<b>Total Personal Services</b>	<b>(\$179,326)</b>	<b>-</b>	<b>-</b>	<b>(\$42,723)</b>	<b>-</b>	<b>-</b>	<b>(\$222,049)</b>
<b>Services &amp; Supplies</b>							
Instate Travel	8,975	-	-	29,130	-	-	38,105
Out of State Travel	1,414	-	-	(1,414)	-	-	-
Employee Training	3,380	-	(116)	(1,667)	-	-	1,597
Office Expenses	4,294	-	-	13,294	-	-	17,588
Telecommunications	5,409	-	(26)	8,760	-	-	14,143
State Gov. Service Charges	(36,445)	-	(107)	(7,839)	-	-	(44,391)
Data Processing	(822)	-	(572)	5,082	-	-	3,688

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Commission for the Blind**  
**Pkg: 101 - WIOA and Employment First**

**Cross Reference Name: Orientation Cntr for the Blind**  
**Cross Reference Number: 58500-005-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Publicity and Publications	793	-	-	(793)	-	-	-
Professional Services	239	-	(726)	487	-	-	-
Attorney General	119	-	-	(119)	-	-	-
Employee Recruitment and Develop	264	-	-	(264)	-	-	-
Dues and Subscriptions	85	-	-	(85)	-	-	-
Facilities Rental and Taxes	(20,273)	-	-	(56,930)	-	-	(77,203)
Fuels and Utilities	465	-	(232)	(2,022)	-	-	(1,789)
Facilities Maintenance	800	-	-	(1,820)	-	-	(1,020)
Agency Program Related S and S	3,254	-	(3,708)	(9,546)	-	-	(10,000)
Other Services and Supplies	(29,485)	-	(5,827)	5,999	-	-	(29,313)
Expendable Prop 250 - 5000	814	-	(10,433)	14,820	-	-	5,201
IT Expendable Property	3,180	-	-	11,749	-	-	14,929
<b>Total Services &amp; Supplies</b>	<b>(\$53,540)</b>	<b>-</b>	<b>(\$21,747)</b>	<b>\$6,822</b>	<b>-</b>	<b>-</b>	<b>(\$68,465)</b>
<b>Special Payments</b>							
Other Special Payments	75,296	-	(108,361)	33,065	-	-	-
<b>Total Special Payments</b>	<b>\$75,296</b>	<b>-</b>	<b>(\$108,361)</b>	<b>\$33,065</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Expenditures</b>							
Total Expenditures	(157,570)	-	(130,108)	(2,836)	-	-	(290,514)
<b>Total Expenditures</b>	<b>(\$157,570)</b>	<b>-</b>	<b>(\$130,108)</b>	<b>(\$2,836)</b>	<b>-</b>	<b>-</b>	<b>(\$290,514)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 101 - WIOA and Employment First

Cross Reference Name: Orientation Cntr for the Blind  
Cross Reference Number: 58500-005-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Ending Balance</b>							
Ending Balance	-	-	131,172	1,237	-	-	132,409
<b>Total Ending Balance</b>	-	-	<b>\$131,172</b>	<b>\$1,237</b>	-	-	<b>\$132,409</b>
<b>Total Positions</b>							
Total Positions							(2)
<b>Total Positions</b>	-	-	-	-	-	-	<b>(2)</b>
<b>Total FTE</b>							
Total FTE							(1.50)
<b>Total FTE</b>	-	-	-	-	-	-	<b>(1.50)</b>

01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:005-00-00 Orientation Cntr for the Blind

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

2017-19  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 090 - Analyst Adjustments

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
2330003	OAS C2333	AP REHAB INST FOR THE BLIND	1-	1.00-	24.00-	09	5,343.00	23,056- 10,798-		105,176- 49,260-		128,232- 60,058-
5854001	OAS C2304	AP MANUAL ARTS INSTRUCTOR	1-	.60-	14.40-	09	4,022.00	12,336- 9,687-		45,581- 35,787-		57,917- 45,474-
TOTAL PICS SALARY								35,392-		150,757-		186,149-
TOTAL PICS OPE								20,485-		85,047-		105,532-
TOTAL PICS PERSONAL SERVICES =			2-	1.60-	38.40-			55,877-		235,804-		291,681-



PACKAGE: 101 - WIOA and Employment First

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0008002	OAS C0104 AP	OFFICE SPECIALIST 2	1-	1.00-	24.00-	09	3,669.00	18,756- 11,018-		69,300- 40,706-		88,056- 51,724-
0031004	MMS X7004 AA	PRINCIPAL EXECUTIVE/MANAGER C	1-	1.00-	24.00-	07	6,056.00	31,569- 15,709-		113,775- 56,618-		145,344- 72,327-
0031004	MMS X7004 AA	PRINCIPAL EXECUTIVE/MANAGER C	1	1.00	24.00	07	6,056.00	30,958 15,406		114,386 56,921		145,344 72,327
0093953	OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	09	5,343.00	17,170- 8,043-		111,062- 52,015-		128,232- 60,058-
0093953	OAS C2333 AP	REHAB INST FOR THE BLIND	1	1.00	24.00	09	5,343.00	27,313 12,793		100,919 47,265		128,232 60,058
0507001	OAS C0104 AP	OFFICE SPECIALIST 2	1-	.50-	12.00-	07	3,347.00	8,555- 8,902-		31,609- 32,889-		40,164- 41,791-
0709001	OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	09	5,343.00	12,823- 6,007-		115,409- 54,051-		128,232- 60,058-
0709001	OAS C2333 AP	REHAB INST FOR THE BLIND	1	1.00	24.00	09	5,343.00	27,301 12,787		100,931 47,271		128,232 60,058
1315003	OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	03	4,022.00	73,159- 40,533-		23,369- 12,949-		96,528- 53,482-
1315003	OAS C2333 AP	REHAB INST FOR THE BLIND	1	1.00	24.00	03	4,022.00	20,560 11,392		75,968 42,090		96,528 53,482
1315004	OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	06	4,641.00	84,429- 42,875-		26,955- 13,688-		111,384- 56,563-
1315004	OAS C2333 AP	REHAB INST FOR THE BLIND	1	1.00	24.00	06	4,641.00	23,725 12,049		87,659 44,514		111,384 56,563
TOTAL PICS SALARY								116,604-		11,616-		128,220-
TOTAL PICS OPE								68,660-		24,855-		93,515-
TOTAL PICS PERSONAL SERVICES =			2-	1.50-	36.00-			185,264-		36,471-		221,735-

**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

Commission for the Blind  
2017-19 Biennium

Agency Number: 58500  
Cross Reference Number: 58500-005-00-00-00000

<i>Source</i>	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
<b>Other Funds</b>						
Other Revenues	-	130,126	128,587	1,064	1,064	-
Transfer In - Intrafund	155,506	-	-	-	-	-
<b>Total Other Funds</b>	<b>\$155,506</b>	<b>\$130,126</b>	<b>\$128,587</b>	<b>\$1,064</b>	<b>\$1,064</b>	<b>-</b>
<b>Federal Funds</b>						
Federal Funds	2,311,044	2,216,221	2,271,336	2,537,069	2,088,338	-
<b>Total Federal Funds</b>	<b>\$2,311,044</b>	<b>\$2,216,221</b>	<b>\$2,271,336</b>	<b>\$2,537,069</b>	<b>\$2,088,338</b>	<b>-</b>

# DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Source	Fund	ORBITS Revenue Acct	2013-2015 Actual	2015-17 Legislatively Adopted	2015-17 Estimated	2017-19		
						Agency Request	Governor's	Legislatively Adopted
<u>OCCB</u>								
<u>58500-005-00-00-00000</u>								
Charges for Services	OF	0410	0	0	0	0	0	
Interest Income	OF	0605	0	0	0	0	0	
Sales Income	OF	0705	0	0	0	0	0	
Donations	OF	0905	0	0	0	0	0	
Other Revenue	OF	0975	0	130,126	128,587	1,064	1,064	
Transfers In – Intrafund	OF	1010	155,506	0	0	0	0	
Transfers Out – Intrafund	OF	2010	0	0	0	0	0	
<b>TOTAL OTHER FUNDS</b>			<b>155,506</b>	<b>130,126</b>	<b>128,587</b>	<b>1,064</b>	<b>1,064</b>	
Federal Funds	FF	0995	2,311,044	2,216,221	2,271,336	2,537,069	2,088,153	
<b>TOTAL FEDERAL FUNDS</b>			<b>2,311,044</b>	<b>2,216,221</b>	<b>2,271,336</b>	<b>2,537,069</b>	<b>2,088,153</b>	

\_\_\_\_\_ Agency Request

Governor's Budget

\_\_\_\_\_ Legislatively Adopted

Budget Page \_\_\_\_\_

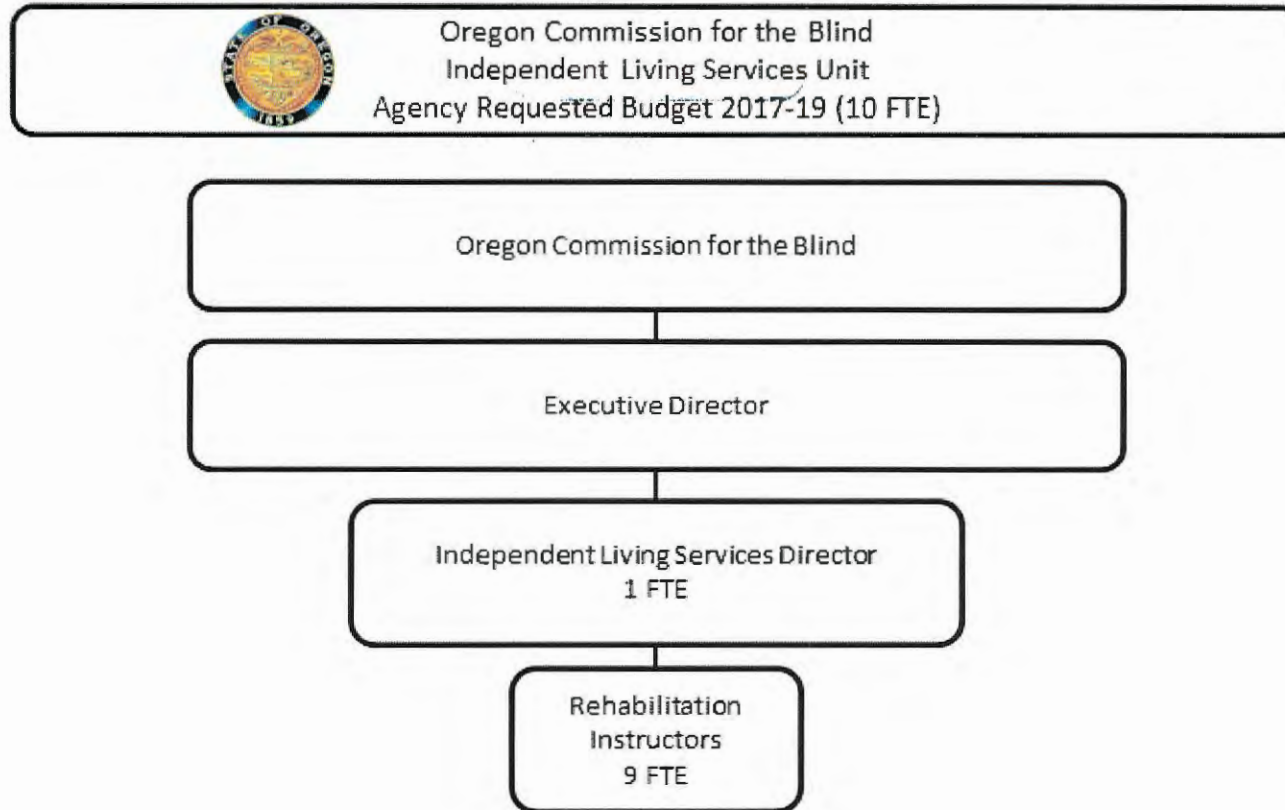
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# Budget Narrative


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## INDEPENDENT LIVING SERVICES

# Budget Narrative



# Budget Narrative

 Oregon Commission for the Blind  
Independent Living Services Unit  
Governor's Budget 2017-19 (9 FTE)

Oregon Commission for the Blind

Executive Director

Independent Living Services Director  
1 FTE

Rehabilitation  
Instructors  
8 FTE

Independent Living  
Instructor (1.0 FTE)

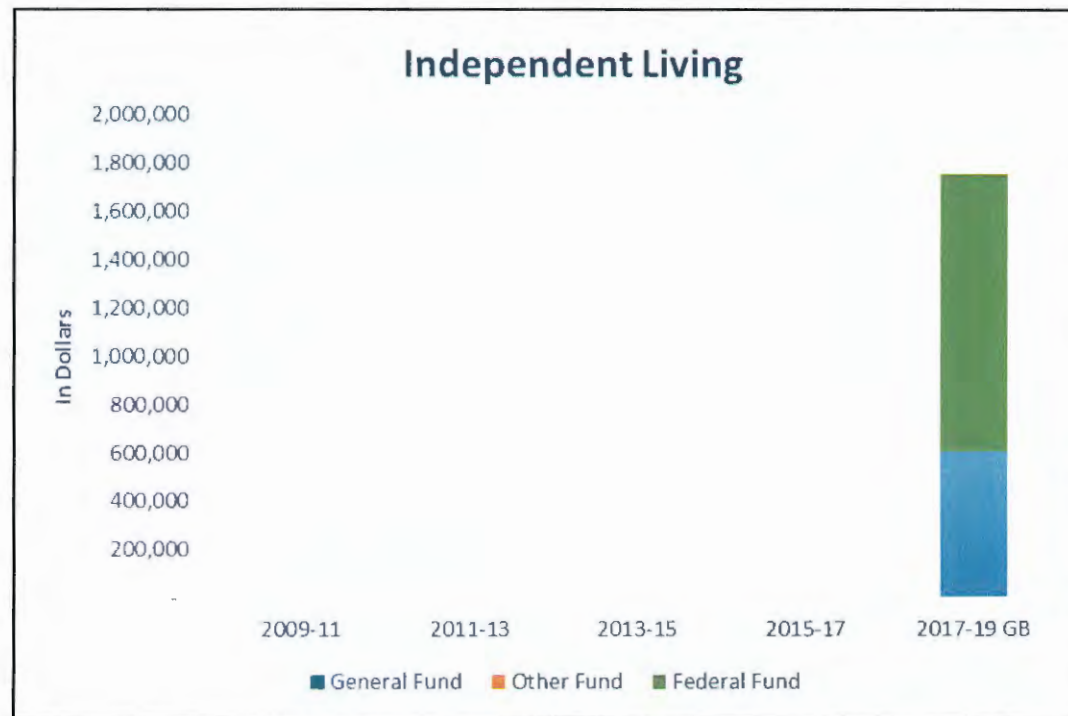
*\* Not Included in Governor's Budget*

# Budget Narrative

## Independent Living Services Program Unit Executive Summary

Program Contact:

Sarah Jo Chaplen, 971-673-1588  
sarahjo.chaplen@state.or.us



*Independent Living Program separated from Rehabilitative Services in B17-19*

# Budget Narrative

## Program Overview

Like all citizens, persons with vision loss want and deserve the opportunity to maintain their independence in their homes and communities. When citizens of this state experiences vision loss, they need access to information and training from specialized professionals. These highly skilled professionals are available at the Oregon Commission for the Blind.

Oregonians who experience vision loss are at risk of being dependent on social services and economic supports. With training and resources, individuals who are blind can life fully independent lives and continue to be active in their community. Staff in the Independent Living Services program teach Oregonians who are blind or visually impaired the skills they need to live safely and independently. Specialized rehabilitation teachers provide individualized assessments and consultation to determine the scope of the teaching services required and provide in home instruction on skill areas such as orientation and mobility(cane travel indoors and outdoors), meal preparation, bill paying, medication management, reading, writing, etc. The result is that these individuals have less or no need for additional services/supports through the state (including but not limited to assisted living/nursing care).

## Program Funding Request

The Requested Budget for the Independent Living Services Program Unit, with corresponding performance projections, is summarized below.

	<b>2017-19 GB</b>	<b>2019-21</b>	<b>2021-2023</b>	<b>2023-25</b>
General Fund	607,104	624,710	642,827	661,469
Other Fund	-	-	-	-
Federal Fund <sup>(1)</sup>	1,146,280	1,146,280	1,146,280	1,146,280
<b>Total Funds</b>	<b>1,753,384</b>	<b>1,770,990</b>	<b>1,789,107</b>	<b>1,807,749</b>

<sup>(1)</sup> IL Federal Grants are projected to remain flat



# Budget Narrative

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## Program Description

The Commission for the Blind provides highly specialized independent living services to Oregonians that experience blindness throughout the state. The Commission is the only resource in Oregon for adults with vision loss who require rehabilitation interventions in order to be fully independent in their homes and communities. The Independent Living Services program provides in home services stateside that include:

Low Vision Assessments – Use of magnifiers and other technology to utilize remaining vision to the greatest advantage.

Orientation & Mobility – Qualified teachers instruct clients on how to travel using a white cane, a guide dog for the blind, or other adaptation. Clients also learn to utilize public transportation and address specific travel needs they may have around their home and community.

Braille Training – For those who are not able to utilize vision for reading or whose eye condition is progressive to the degree that they will not be able to effectively access print.

Adaptive Devices Training – Today, adaptive devices range from the traditional braille note takers and specialized blindness devices for identifying money, objects, scanning print documents, to using off-the-shelf devices like the Apple iPhone, iPad or iPod Touch and Android tablets and phones. The Apple and Android devices have built-in speech output and/or magnification that allow a visually impaired person to have access to the same variety of reading materials and information as their sighted family and friends, giving them access to most reading material and information so they can compete on an equal footing. These devices have apps that replace many of the more expensive specialized blindness devices making them an extremely cost-effective alternative.

Meal Prep – Food preparation and planning, organization of kitchen items, grocery shopping and other skills necessary to successfully remain independent. Through learning these techniques, clients also become able to organize other areas of their life through adaptation and engage in the activities that they enjoyed prior to their vision

## Budget Narrative

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loss.

Techniques of Daily Living – This class is designed to teach clients independent living skills which they have identified as barriers to living independently in their homes. Classes are taught one-on-one and geared to the type of learning most useful for the client, such as auditory or kinesthetic. Types of skills which may be taught include: use of washer/dryer and clothing care and management; personal hygiene; cleaning such as vacuuming, cleaning bathroom, sweeping, mopping, etc.; organizing and identifying medications and many other skills.

Teachers also provide training to assisted living care providers so that providers can be more effective in supporting the independence of residents who are visually impaired.

Our referral sources/partners in the rehabilitation process are as follows:

Family Members – Family members and friends who are seeking assistance for loved ones who are experiencing vision loss and need assistance.

Medical Providers – As providers throughout the state discover and inform individuals about their visual conditions (often a very sensitive/emotional time for those with new vision loss), they also refer these clients to the agency for support in maintaining their independence and employment.

Other State/Government Programs - individuals seeking supports or accessing other public agency services who would benefit from services from our agency are referred to us for training and support to maximize their independence opportunities. We also refer out to these partner agencies in cases where our clients need additional non-blindness related services not available through the Commission.

### **Cost Drivers**

Technology Training and Devices - One of the largest is associated with technology and adaptive equipment. With advances in technology, many more tasks become possible to perform without vision. In reality, many more clients

## Budget Narrative

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could benefit from adaptive technology training and acquisition for their daily living tasks through the Commission's independent living programs if funding was available.

### **Program Justification**

The Independent Living Program is directly tied to the following priority established by Governor Brown:

#### ***Healthy, Safe Oregonians***

Oregonians who are blind that can be actively engaged in their community and enjoy participation in hobbies, recreation, civic engagement, or whatever their interests take them. Seniors who lose their vision and desire to remain living in their own homes can learn to be safe and independent in their daily lives through specialized adaptive training designed for their own environment and life. This training is provided via the agency's specialized rehabilitation staff.

Individuals who experience vision loss require specialized training, tools and resources in order to safely and meaningfully live in their homes and communities (travelling/ participating and engaging in everyday life). Without training, individuals who experience vision loss are likely to need higher levels of support from the state and nursing care as they age. However, when these individuals are provided with the necessary training and tools, they can continue to live and function in their own homes safely and independently. This independence not only aligns with Oregon's core values, it results in a significant cost savings to the state that would be provided in the form of personal attendants or assisted living or nursing care.

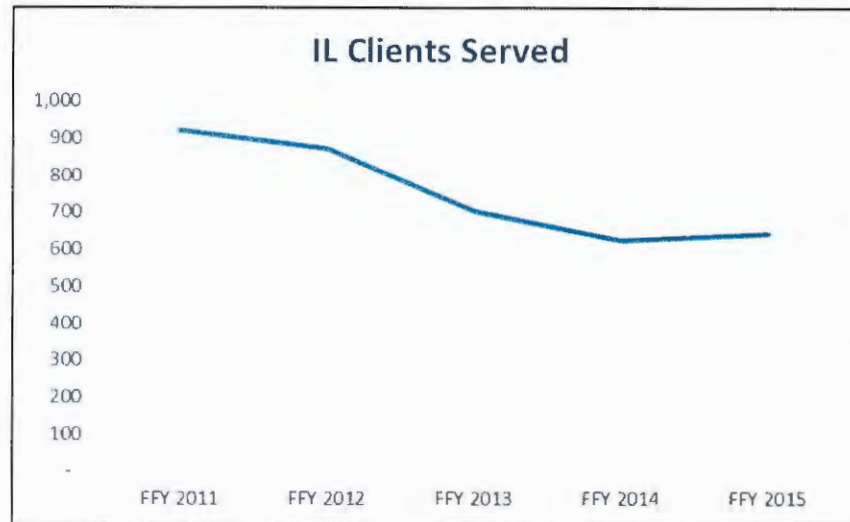
### **Return on Investment**

The agency's independent living programs are also crucial and cost effective for the state. Independent Living Services in the form of rehabilitation teaching interventions can delay or eliminate the need for other expensive state funded supports. These successful interventions, which mitigate the need for nursing or assisted living care, result

## Budget Narrative

in savings to the state ranging from \$19,686 for assisted living to \$101,040 for nursing home care per individual per year. In 2015, for an average cost of \$777 per individual served, when the agency is able to delay even the lowest level of care for individuals served for only one year, the potential savings to the state is \$12.7 million.

### Program Performance



	FFY 2011	FFY 2012	FFY 2013	FFY 2014	FFY 2015
IL Clients Served	922	873	703	625	644
ILOB Direct Service Cost/Client	\$417	\$749	\$699	\$695	\$581
Client Satisfaction *	N/A	N/A	95%	90%	89%

\* Client survey started in FFY 2013

## Budget Narrative

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### **Enabling Legislation/Program Authorization**

This program is authorized by Federal Law establishing vocational rehabilitation programs specializing in serving individuals who are blind. The Workforce Innovation and Opportunity Act of 2014, PL 113-128 and ORS 346.110-346.250.

### **Funding Streams**

Oregon Commission for the Blind's Independent Living is funded through both federal and state funds. Federal grants are administered by the U. S. Department of Education and Health and Human Services Administration for Community Living. Both grants are formula based budget with matching and maintenance of effort requirements. The federal law outlines that the funds are protected for the sole purpose of the designated state agency with an approved state plan to administer services under federal law. For the independent living programs the match is 9:1 federal to state/other resources.

### **Changes from 2015-17 Approved Budget**

Under the Workforce Innovation and Opportunity Act, Congress placed an emphasis on competitive, integrated employment, which provided a distinction between vocational rehabilitation, and independent living services that do not result in an employment outcome. In response to this change, Rehabilitation Services and Independent Living Services have been separated out into two distinct programs in the agency request budget.

Even with the investment of staff within the 2015-17 budget, the federal funding does not fully support the staff required to meet the needs of Oregonians who are blind for Independent Living. Federal funding for the Independent Living grants through the U. S. Departments of Education and Health and Human Services have not increased over the past few federal fiscal years. The only increases occurring in independent living programs across the country are state investments (general fund). While the Independent Living Instructors serve the entire state for the needed services, only 75% of personal services for these positions are covered with both the state and federal investment. The other quarter of these direct service hours support the Vocational Rehabilitation program. Based on current national information, there is no federal fund increases projected in this program.

# Budget Narrative

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## Program Unit Narrative

### Activities, Programs, and Issues

#### Under age 55

For individuals who are legally blind under the age of 55 who are not interested in or able to seek employment, the federal Workforce Innovation and Opportunity Act ensures that persons who are blind have access to basic Independent Living Services. This program is administered under the US Department of Health and Human Services Administration for Community Living. These services are designed to assist persons with vision loss in adjusting, functioning and living as independently as possible within their communities. This population is not served within the traditional vocational rehabilitation program because their goal is to acquire independent living skills rather than to obtain employment.

#### Over age 55

For individuals who are age 55 and over who are either legally blind or significantly visually impaired who are not interested in or able to seek employment, the federal Workforce Innovation and Opportunity Act ensures that persons who are blind have access to basic Independent Living Services. This program is administered under the US Department of Education.

Both of these programs provide similar services to eligible clients. Services are provided by qualified rehabilitation teachers of the blind who provide services to consumers in their own homes and communities. Teachers and clients work together to determine goals based upon the individual's skills, abilities, challenges, home/community environments and an array of other factors.

## Budget Narrative

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### **Trends in Caseload and Workload Measures**

Demand for services constantly increases as the older adult segment of our population grows. This population is the fastest growing of any group. With the increases in the aging population and longer life expectancies, the workload in the independent living program continues to exceed the existing staffing resources.

### **Revenue Sources and Proposed Changes**

See Revenue Forecast Narrative under "Revenue" Tab.

# Budget Narrative

## Essential and Policy Packages and Fiscal Impact Summary

The current service level through agency request budget showing expenditures by fund type, position and full-time equivalent positions for the Independent Living Program Unit is displayed in the following table.

	2017-19 Current Service Level	Package 101 WIOA Implementation	2017-19 Agency Request Budget	Package 91-93 Analyst Rec	2017-19 Governor's Budget
General Fund	804,441	(197,337)	607,104	(190,776)	416,328
Other Fund			-		-
Federal Fund	1,434,928	(288,648)	1,146,280	(7,038)	1,139,242
Total Funds	2,239,369	(485,985)	1,753,384	(197,814)	1,555,570
Positions	10	-	10	(1)	9
FTE	10.00	(2.50)	7.50	(1.00)	6.50

### Essential Packages

#### 010 Non-PICS Psnl Svc / Vacancy Factor

##### Package Description

Provide allowances for non-PICS personal services budget items and to reflect savings from anticipated staff turnover. This package is based on vacancy experience, costs or temporary services and other items.

Adjustments from base budget total \$24,236 (\$13,444 Federal Funds and \$10,792 General Fund).



# Budget Narrative

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## **031 Standard Inflation**

### **Package Description**

Allows for a general inflation factor that applies to most Services and Supplies and non-PICS Personal Services costs, Capital Outlay and Come Special Payments. It also allows inflation at published rates for State Government Service Charges, uniform and non-uniform rent, various assessments and other items. It also includes the standard portion (3.7%) of medical cost increases, non-state employee personnel costs, as applied to Special Payments and usage-based Price List items.

Adjustments from base budget total \$7,807 (All General Fund).

## **032 Above Standard Inflation**

### **Package Description**

This package includes the amount above, not including standard inflation, for a limited number of expenditure types. For this program unit, the non-standard inflation relates to professional services.

Adjustments from base budget total \$31,810 (All General Fund).

## **060 Independent Services Separate Detailed Cross-Reference**

### **Package Description**

This package includes the transfer of services and supplies expenditures and special payments to a separate detailed cross-reference for the Independent Living (IL) Services Program Unit. The positions were moved as part of 2017-19 base budget. IL is funded by separate federal grants and staff work with a separate group of clients.

## Budget Narrative

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While clients can span between these two programs, the services provided within the IL Program are for clients not returning to the workforce. Federal grant match percentage differ as well. This separation allows for an improvement in tracking the financial status of each program.

Adjustments from base budget total \$322,999 (\$270,901 Federal Funds and \$52,098 General Fund)

### *Policy Packages*

#### **101 Workforce Investment and Opportunities Act (WIOA) Implementation**

##### **Related Legislation**

Workforce Innovation and Opportunity Act of 2014.

##### **Purpose**

The Workforce Innovation and Opportunity Act (WIOA), represents the first major reform of the public workforce system in more than 15 years. Achieving WIOA's ambitious goals required significant changes to workforce development programs, including improved collaboration across agencies, workforce boards, employers, and educational institutions; a greater focus on outcomes and efficiency; and better engagement with job seekers and employers. In order to make the necessary changes required under WIOA, the agency infrastructure has to expand to address all of the requirements under WIOA. This POP is designed to enhance the VR program and service delivery system to achieve a higher level of collaboration, partnership, outcomes and opportunities for Oregonians who are blind as expected by WIOA. These positions will create and maintain policy and infrastructure changes needed to support WIOA, provide training to staff, quality assurance, add partnerships, and add employment retention and sustainability to the service delivery model.

##### **Detail Plan**

The Independent Living Services Program unit is impacted by the WIOA restructuring. The actions within Policy Option Package 101 are a result of the limitations of the PICS System, and actions that are typically captured within

## Budget Narrative

Package 060 were moved to POP 101 in order to implement to funding split changes within PICS. Since 25% of these positions provide direct services within Vocational Rehabilitation, the funding splits are different than within Independent Living Services. This entry included both the portion of Vocational Rehabilitation services provided and the appropriate funding splits for each program.

### How Achieved

Policy Option Package 101 is funded by the Vocational Rehabilitation Basic 110 grant increase in split for the statewide grant award, increased from 12.5% to 15.6%, the national average for blind agencies. Other funds revenue is projected as part of expansion of third-party corporative agreements with educational institutions. First, the federal revenue shortfall was funded resulting in restoration of Special Payment for client services. Then, new and expanded positions and associated services and supplies expenditures were funded. Expenditures were adjusted within each program unit as positions were moved to accomodate the new support structure. All expenditure lines were reviewed for appropriate fund splits and adjustments were made between program units. All positions funding splits with PICS were reviewed and adjusted to match current funding streams within each program unit. As a result, the majority of the match requirement for the increase in federal funds was met within the current budget.

Fiscal impact by program unit is as follows:

	GF	OF	FF	TF	Pos.	FTE
<b>Revenue</b>	<b>(350)</b>	<b>259,194</b>	<b>2,536,574</b>	<b>2,795,418</b>		
Administrative Services	714,932	(20,704)	1,153,715	1,847,943	11	11.00
Rehabilitation Services Program	118,399	375,640	1,329,033	1,823,072	1	5.39
Business Enterprise Program	(478,774)	107,142	345,310	(26,322)	-	-
Orientation and Career Center Program	(157,570)	(130,108)	(2,836)	(290,514)	(2)	(1.50)
Independent Living Services Program	(197,337)	-	(288,648)	(485,985)	-	(2.50)
<b>Expenditures</b>	<b>(350)</b>	<b>331,970</b>	<b>2,536,574</b>	<b>2,868,194</b>	<b>10</b>	<b>12.39</b>

## Budget Narrative

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### Staffing

Twenty-five percent of funding for Independent Living Instructors, 2.5 FTE, budgeted in Rehabilitation Services Program unit due to capped federal grant funding.

### 091 Analyst Recommendations

#### Independent Living Instructor (1.0 FTE)

Reduction reverses prior biennium's investment in direct services to seniors in Oregon that allow them to remain independent in their homes after experiencing vision loss. This reduction would reverse the agency's ability to serve Oregonians who are blind within 2-3 weeks of referral, which had been as high as 9 weeks prior to the legislative investment in 2015.

Expenditures by Category	GF	OF	FF	TF	Pos.	FTE
Personal Services	(188,283)	-	-	(188,283)	(1)	(1.00)
Services & Supplies	-	-	-	-		
Capital Outlay	-	-	-	-		
Special Payments	-	-	-	-		
<b>Total Expenditures</b>	<b>(188,283)</b>	<b>-</b>	<b>-</b>	<b>(188,283)</b>	<b>(1)</b>	<b>(1.00)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Independent Living Services  
 Cross Reference Number: 58500-006-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	10,792	-	-	-	-	-	10,792
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>\$10,792</b>	-	-	-	-	-	<b>\$10,792</b>
<b>Personal Services</b>							
Pension Obligation Bond	27,209	-	-	45,291	-	-	72,500
Mass Transit Tax	2,813	-	-	-	-	-	2,813
Vacancy Savings	(19,230)	-	-	(31,847)	-	-	(51,077)
<b>Total Personal Services</b>	<b>\$10,792</b>	-	-	<b>\$13,444</b>	-	-	<b>\$24,236</b>
<b>Total Expenditures</b>							
Total Expenditures	10,792	-	-	13,444	-	-	24,236
<b>Total Expenditures</b>	<b>\$10,792</b>	-	-	<b>\$13,444</b>	-	-	<b>\$24,236</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	(13,444)	-	-	(13,444)
<b>Total Ending Balance</b>	-	-	-	<b>(\$13,444)</b>	-	-	<b>(\$13,444)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 031 - Standard Inflation

Cross Reference Name: Independent Living Services  
Cross Reference Number: 58500-006-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	7,807	-	-	-	-	-	7,807
<b>Total Revenues</b>	<b>\$7,807</b>	-	-	-	-	-	<b>\$7,807</b>
<b>Services &amp; Supplies</b>							
State Gov. Service Charges	7,807	-	-	-	-	-	7,807
<b>Total Services &amp; Supplies</b>	<b>\$7,807</b>	-	-	-	-	-	<b>\$7,807</b>
<b>Total Expenditures</b>							
Total Expenditures	7,807	-	-	-	-	-	7,807
<b>Total Expenditures</b>	<b>\$7,807</b>	-	-	-	-	-	<b>\$7,807</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 032 - Above Standard Inflation

Cross Reference Name: Independent Living Services  
Cross Reference Number: 58500-006-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	31,810	-	-	-	-	-	31,810
<b>Total Revenues</b>	<b>\$31,810</b>	-	-	-	-	-	<b>\$31,810</b>
<b>Services &amp; Supplies</b>							
Instate Travel	4,090	-	-	-	-	-	4,090
Telecommunications	2,945	-	-	-	-	-	2,945
Data Processing	4,503	-	-	-	-	-	4,503
Other Services and Supplies	20,272	-	-	-	-	-	20,272
<b>Total Services &amp; Supplies</b>	<b>\$31,810</b>	-	-	-	-	-	<b>\$31,810</b>
<b>Total Expenditures</b>							
Total Expenditures	31,810	-	-	-	-	-	31,810
<b>Total Expenditures</b>	<b>\$31,810</b>	-	-	-	-	-	<b>\$31,810</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Commission for the Blind  
Pkg: 060 - Technical Adjustments

Cross Reference Name: Independent Living Services  
Cross Reference Number: 58500-006-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	52,098	-	-	-	-	-	52,098
Federal Funds	-	-	-	-	-	-	-
<b>Total Revenues</b>	<b>\$52,098</b>	-	-	-	-	-	<b>\$52,098</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	-	-	-	-	-	-	-
Overtime Payments	510	-	-	706	-	-	1,216
All Other Differential	938	-	-	3,440	-	-	4,378
Empl. Rel. Bd. Assessments	-	-	-	-	-	-	-
Public Employees' Retire Cont	276	-	-	792	-	-	1,068
Social Security Taxes	111	-	-	317	-	-	428
Worker's Comp. Assess. (WCD)	-	-	-	-	-	-	-
Flexible Benefits	-	-	-	-	-	-	-
<b>Total Personal Services</b>	<b>\$1,835</b>	-	-	<b>\$5,255</b>	-	-	<b>\$7,090</b>
<b>Services &amp; Supplies</b>							
Instate Travel	1,944	-	-	44,767	-	-	46,711
Employee Training	1,581	-	-	10,433	-	-	12,014
Office Expenses	594	-	-	9,688	-	-	10,282
Telecommunications	1,440	-	-	23,925	-	-	25,365
State Gov. Service Charges	-	-	-	21,684	-	-	21,684
Data Processing	-	-	-	12,000	-	-	12,000
Publicity and Publications	-	-	-	250	-	-	250
Dues and Subscriptions	-	-	-	559	-	-	559



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 060 - Technical Adjustments

Cross Reference Name: Independent Living Services  
Cross Reference Number: 58500-006-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Facilities Rental and Taxes	27,000	-	-	95,235	-	-	122,235
Fuels and Utilities	-	-	-	1,490	-	-	1,490
Facilities Maintenance	-	-	-	1,724	-	-	1,724
Other Services and Supplies	-	-	-	15,000	-	-	15,000
Expendable Prop 250 - 5000	15,204	-	-	5,000	-	-	20,204
<b>Total Services &amp; Supplies</b>	<b>\$47,763</b>	-	-	<b>\$241,755</b>	-	-	<b>\$289,518</b>
<b>Special Payments</b>							
Other Special Payments	2,500	-	-	23,891	-	-	26,391
<b>Total Special Payments</b>	<b>\$2,500</b>	-	-	<b>\$23,891</b>	-	-	<b>\$26,391</b>
<b>Total Expenditures</b>							
Total Expenditures	52,098	-	-	270,901	-	-	322,999
<b>Total Expenditures</b>	<b>\$52,098</b>	-	-	<b>\$270,901</b>	-	-	<b>\$322,999</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	(270,901)	-	-	(270,901)
<b>Total Ending Balance</b>	-	-	-	<b>(\$270,901)</b>	-	-	<b>(\$270,901)</b>
<b>Total FTE</b>							
Total FTE	-	-	-	-	-	-	-
<b>Total FTE</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
Pkg: 090 - Analyst Adjustments

Cross Reference Name: Independent Living Services  
Cross Reference Number: 58500-006-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(188,283)	-	-	-	-	-	(188,283)
<b>Total Revenues</b>	<b>(\$188,283)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(\$188,283)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	(128,232)	-	-	-	-	-	(128,232)
Empl. Rel. Bd. Assessments	(57)	-	-	-	-	-	(57)
Public Employees' Retire Cont	(16,786)	-	-	-	-	-	(16,786)
Social Security Taxes	(9,810)	-	-	-	-	-	(9,810)
Worker's Comp. Assess. (WCD)	(69)	-	-	-	-	-	(69)
Flexible Benefits	(33,336)	-	-	-	-	-	(33,336)
Reconciliation Adjustment	7	-	-	-	-	-	7
<b>Total Personal Services</b>	<b>(\$188,283)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(\$188,283)</b>
<b>Total Expenditures</b>							
Total Expenditures	(188,283)	-	-	-	-	-	(188,283)
<b>Total Expenditures</b>	<b>(\$188,283)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(\$188,283)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 090 - Analyst Adjustments

Cross Reference Name: Independent Living Services  
 Cross Reference Number: 58500-006-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Total Positions</b>							
Total Positions							(1)
<b>Total Positions</b>	-	-	-	-	-	-	<b>(1)</b>
<b>Total FTE</b>							
Total FTE							(1.00)
<b>Total FTE</b>	-	-	-	-	-	-	<b>(1.00)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 091 - Statewide Adjustment DAS Chgs

Cross Reference Name: Independent Living Services  
 Cross Reference Number: 58500-006-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(2,493)	-	-	-	-	-	(2,493)
Federal Funds	-	-	-	(7,038)	-	-	(7,038)
<b>Total Revenues</b>	<b>(\$2,493)</b>	<b>-</b>	<b>-</b>	<b>(\$7,038)</b>	<b>-</b>	<b>-</b>	<b>(\$9,531)</b>
<b>Services &amp; Supplies</b>							
State Gov. Service Charges	(550)	-	-	(1,581)	-	-	(2,131)
Other Services and Supplies	(1,943)	-	-	(5,457)	-	-	(7,400)
<b>Total Services &amp; Supplies</b>	<b>(\$2,493)</b>	<b>-</b>	<b>-</b>	<b>(\$7,038)</b>	<b>-</b>	<b>-</b>	<b>(\$9,531)</b>
<b>Total Expenditures</b>							
Total Expenditures	(2,493)	-	-	(7,038)	-	-	(9,531)
<b>Total Expenditures</b>	<b>(\$2,493)</b>	<b>-</b>	<b>-</b>	<b>(\$7,038)</b>	<b>-</b>	<b>-</b>	<b>(\$9,531)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Commission for the Blind**  
**Pkg: 101 - WIOA and Employment First**

**Cross Reference Name: Independent Living Services**  
**Cross Reference Number: 58500-006-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(197,337)	-	-	-	-	-	(197,337)
Federal Funds	-	-	-	(1)	-	-	(1)
<b>Total Revenues</b>	<b>(\$197,337)</b>	<b>-</b>	<b>-</b>	<b>(\$1)</b>	<b>-</b>	<b>-</b>	<b>(\$197,338)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	(18,605)	-	-	(261,637)	-	-	(280,242)
Empl. Rel. Bd. Assessments	(28)	-	-	(98)	-	-	(126)
Public Employees' Retire Cont	(905)	-	-	(38,184)	-	-	(39,089)
Social Security Taxes	(1,423)	-	-	(20,018)	-	-	(21,441)
Worker's Comp. Assess. (WCD)	(30)	-	-	(123)	-	-	(153)
Flexible Benefits	(14,618)	-	-	(60,388)	-	-	(75,006)
Reconciliation Adjustment	(134,203)	-	-	87,130	-	-	(47,073)
<b>Total Personal Services</b>	<b>(\$169,812)</b>	<b>-</b>	<b>-</b>	<b>(\$293,318)</b>	<b>-</b>	<b>-</b>	<b>(\$463,130)</b>
<b>Services &amp; Supplies</b>							
Instate Travel	(6,034)	-	-	(13,090)	-	-	(19,124)
Employee Training	(967)	-	-	(1,550)	-	-	(2,517)
Office Expenses	1,768	-	-	2,835	-	-	4,603
Telecommunications	(1,925)	-	-	(3,088)	-	-	(5,013)
State Gov. Service Charges	4,171	-	-	6,691	-	-	10,862
Data Processing	(1,674)	-	-	(2,686)	-	-	(4,360)
Facilities Rental and Taxes	(6,389)	-	-	(9,084)	-	-	(15,473)
Fuels and Utilities	-	-	-	(213)	-	-	(213)
Facilities Maintenance	125	-	-	200	-	-	325

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Commission for the Blind  
 Pkg: 101 - WIOA and Employment First

Cross Reference Name: Independent Living Services  
 Cross Reference Number: 58500-006-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Other Services and Supplies	(18,248)	-	-	1,652	-	-	(16,596)
Expendable Prop 250 - 5000	(1,764)	-	-	(2,831)	-	-	(4,595)
IT Expendable Property	3,412	-	-	5,474	-	-	8,886
<b>Total Services &amp; Supplies</b>	<b>(\$27,525)</b>	<b>-</b>	<b>-</b>	<b>(\$15,690)</b>	<b>-</b>	<b>-</b>	<b>(\$43,215)</b>
<b>Special Payments</b>							
Other Special Payments	-	-	-	20,360	-	-	20,360
<b>Total Special Payments</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$20,360</b>	<b>-</b>	<b>-</b>	<b>\$20,360</b>
<b>Total Expenditures</b>							
Total Expenditures	(197,337)	-	-	(288,648)	-	-	(485,985)
<b>Total Expenditures</b>	<b>(\$197,337)</b>	<b>-</b>	<b>-</b>	<b>(\$288,648)</b>	<b>-</b>	<b>-</b>	<b>(\$485,985)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	288,647	-	-	288,647
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$288,647</b>	<b>-</b>	<b>-</b>	<b>\$288,647</b>
<b>Total FTE</b>							
Total FTE	-	-	-	-	-	-	(2.50)
<b>Total FTE</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(2.50)</b>

01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:006-00-00 Independent Living Services

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

PAGE 10  
 2017-19  
 PROD FILE  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 090 - Analyst Adjustments

POSITION NUMBER CLASS COMP CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0800001 OAS C2333 AP REHAB INST FOR THE BLIND	1-	1.00-	24.00-	09	5,343.00	128,232- 60,058-				128,232- 60,058-
TOTAL PICS SALARY						128,232-				128,232-
TOTAL PICS OPE						60,058-				60,058-
TOTAL PICS PERSONAL SERVICES =	1-	1.00-	24.00-			188,290-				188,290-

01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:006-00-00 Independent Living Services

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

2017-19  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 101 - WIOA and Employment First

POSITION NUMBER CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0031003 MMS X7004 AA	PRINCIPAL EXECUTIVE/MANAGER C	1-	1.00-	24.00-	09	6,673.00	20,531- 9,780-		139,621- 66,507-		160,152- 76,287-
0031003 MMS X7004 AA	PRINCIPAL EXECUTIVE/MANAGER C	1	.75	18.00	09	6,673.00	45,992 21,907		74,122 35,309		120,114 57,216
0507002 OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	09	5,343.00			128,232- 60,058-		128,232- 60,058-
0507002 OAS C2333 AP	REHAB INST FOR THE BLIND	1	.75	18.00	09	5,343.00	36,835 17,252		59,339 27,791		96,174 45,043
0800002 OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	02	3,847.00	92,328- 52,611-				92,328- 52,611-
0800002 OAS C2333 AP	REHAB INST FOR THE BLIND	1	.75	18.00	02	3,847.00	26,521 15,113		42,725 24,345		69,246 39,458
0800003 OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	07	4,860.00	116,640- 57,653-				116,640- 57,653-
0800003 OAS C2333 AP	REHAB INST FOR THE BLIND	1	.75	18.00	07	4,860.00	33,505 16,561		53,975 26,679		87,480 43,240
7042001 OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	08	5,095.00	26,046- 12,529-		96,234- 46,294-		122,280- 58,823-
7042001 OAS C2333 AP	REHAB INST FOR THE BLIND	1	.75	18.00	08	5,095.00	35,125 16,897		56,585 27,221		91,710 44,118
7235003 OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	07	4,860.00	24,844- 12,281-		91,796- 45,372-		116,640- 57,653-
7235003 OAS C2333 AP	REHAB INST FOR THE BLIND	1	.75	18.00	07	4,860.00	33,505 16,561		53,975 26,679		87,480 43,240
7235004 OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	09	5,343.00	20,068- 9,399-		108,164- 50,659-		128,232- 60,058-
7235004 OAS C2333 AP	REHAB INST FOR THE BLIND	1	.75	18.00	09	5,343.00	36,835 17,252		59,339 27,791		96,174 45,043
7235007 OAS C2333 AP	REHAB INST FOR THE BLIND	1-	1.00-	24.00-	09	5,343.00	20,068- 9,399-		108,164- 50,659-		128,232- 60,058-
7235007 OAS C2333 AP	REHAB INST FOR THE BLIND	1	.75	18.00	09	5,343.00	36,835 17,252		59,339 27,791		96,174 45,043



01/24/17 REPORT NO.: PDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY:58500 COMMISSION FOR THE BLIND  
 SUMMARY XREF:006-00-00 Independent Living Services

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

PAGE 12  
 PROD FILE

2017-19  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 101 - WIOA and Employment First

POSITION NUMBER	CLASS	COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
7235008	OAS	C2333	AP REHAB INST FOR THE BLIND	1-	1.00-	24.00-	09	5,343.00	20,068- 9,399-		108,164- 50,659-		128,232- 60,058-
7235008	OAS	C2333	AP REHAB INST FOR THE BLIND	1	.75	18.00	09	5,343.00	36,835 17,252		59,339 27,791		96,174 45,043
TOTAL PICS SALARY									18,605-		261,637-		280,242-
TOTAL PICS OPE									17,004-		118,811-		135,815-
TOTAL PICS PERSONAL SERVICES =											380,448-		416,057-

**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

Commission for the Blind  
2017-19 Biennium

Agency Number: 58500  
Cross Reference Number: 58500-006-00-00-00000

Source	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
<b>Federal Funds</b>						
Federal Funds	-	-	-	1,146,280	1,139,242	-
<b>Total Federal Funds</b>	-	-	-	<b>\$1,146,280</b>	<b>\$1,139,242</b>	-

# DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Source	Fund	ORBITS Revenue Acct	2013-2015 Actual	2015-17 Legislatively Adopted	2015-17 Estimated	2017-19		
						Agency Request	Governor's	Legislatively Adopted
<u>Independent Living</u>								
<u>58500-006-00-00-00000</u>								
Charges for Services	OF	0410	0	0	0	0	0	
Interest Income	OF	0605	0	0	0	0	0	
Sales Income	OF	0705	0	0	0	0	0	
Donations	OF	0905	0	0	0	0	0	
Other Revenue	OF	0975	0	0	0	0	0	
Transfers In – Intrafund	OF	1010	0	0	0	0	0	
Transfers Out – Intrafund	OF	2010	0	0	0	0	0	
<b>TOTAL OTHER FUNDS</b>			0	0	0	0	0	
Federal Funds	FF	0995	Note	Note	Note	1,146,280	1,139,242	
<b>TOTAL FEDERAL FUNDS</b>			N/A	N/A	N/A	1,146,280	1,139,242	
Note: 13-15 & 15-17 Included in Rehabilitation Services Program								

\_\_\_\_\_ Agency Request

  X   Governor's Budget

\_\_\_\_\_ Legislatively Adopted

Budget Page \_\_\_\_\_

# Budget Narrative

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## SPECIAL REPORTS

# Budget Narrative

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## Information Technology-Related Projects/Initiatives

### Policy Option Package 103 Case Management System Migration

#### Purpose

The agency utilizes an automated case management system to capture federally required data reporting elements and to facilitate the case development and tracking of information of individuals who are participating in agency services in the areas of vocational rehabilitation, independent living and business enterprises.

Our current case management system has been in operation for many years and due to the recent changes that resulted under the passage of the Workforce Innovation and Opportunity Act, the company that has been providing us with the software has determined that it will no longer be offering or maintaining the case management system product after December 2017.

As a result of this change, the agency will be required to convert to a new system. Although the scope of this project will not meet the threshold for a major IT Project, the agency is working with our assigned Strategic Technology Officer with the Office of the Chief Information Officer (CIO) and the Department of Administrative Services Office of Procurement to facilitate the appropriate planning and staging of the project.

The agency intends to move forward with a system that is off the shelf and is utilized by another state agency that has a long history of success in utilizing the product. This will ensure that there will be a smooth transition for the agency staff and customers and allow the agency the optimal conditions for a successful transition to the new system.

We have developed the total project costs in consultation and partnership with the Strategic Technology Officer assigned to the agency. The total costs include IT professional services that include the assessment/gap analysis, migration of data, software license costs, pilot implementation and project management. The agency is requesting the personal services funds to increase one of our staff from part time to full time to be the lead.

## Budget Narrative

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This policy package reflects the total projected costs for the changeover, some of which are one time up front expenditures that would not be continued beyond this budget period. Future budget cycles would see a significant reduction due to shift from up front changeover costs to ongoing maintenance costs.

### How Achieved

The agency is requesting general fund for this one time changeover cost with the limited duration position to support this project.

Expenditures by Category	GF	OF	FF	TF	Pos.	FTE
Personal Services	101,038	-	-	101,038	1	0.50
Services & Supplies	538,750	-	-	538,750		
Capital Outlay	-	-	-	-		
Special Payments	-	-	-	-		
<b>Total Expenditures</b>	<b>639,788</b>	<b>-</b>	<b>-</b>	<b>639,788</b>	<b>1</b>	<b>0.50</b>

### Staffing Impact

Policy Analyst – Limited Duration 0.5 FTE

### Analyst Recommendation – Denied

The Workforce Innovation and Opportunity Act system reporting and tracking requirements will require an upgrade to the agency's case management system. This was not included in the Governor's Budget due to general fund constraints. The agency explored alternatives prior to requesting general fund. Continue with the existing case management system, which will no longer be supported or updated by software provider after December, 2017 –

## Budget Narrative

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this is a programmatic and security risk to the state and was not considered a viable option. Utilize resources from special payments (services to clients) to fund the upgrade – this was not pursued as it would result in a shortfall in resources to serve eligible clients in the VR Program and cause an Order of Selection/wait list to occur. The agency will need to move forward with a plan to finance this required upgrade – which will require the revisiting of the alternatives considered and/or exploring other options.



## Budget Narrative

WITHOUT MIGRATION AGREEMENT	CY15	CY16	CY17	CY18	CY19	CY20	CY21	CY22	CY23	CY24	CY25	CY26	10 Yr Total
Annual License Fee	12,647	13,280	13,944										39,871
Annual Support & Maintenance	24,840	26,082	27,386										78,308
Help desk - Tier 2	42,000	44,100	46,305										132,405
<b>Total</b>	<b>79,487</b>	<b>83,462</b>	<b>87,635</b>	0	0	0	0	0	0	0	0	0	250,584

WITH MIGRATION AGREEMENT	CY15	CY16	CY17	CY18	CY19	CY20	CY21	CY22	CY23	CY24	CY25	CY26	10 Yr Total
<b>Alliance - AWARE Software</b>													
AWARE COTS License	0	0	0	0	0	0	0	0	0	0	0	0	0
Software Maintenance & Support	0	37,487	41,236	45,360	49,896	54,885	60,374	66,411	73,052	80,357	88,393	97,232	694,682
<b>Libera - Help Desk Support</b>													
Annual License Fee	12,647	12,647											25,295
Annual Support & Maintenance	24,840	24,840											49,680
Help Desk - Tier 2	42,000	42,000	42,000	44,100	46,305	48,620	51,051	53,604	56,284	59,098	62,053	65,156	612,271
<b>Total</b>	<b>79,487</b>	<b>116,974</b>	<b>83,236</b>	<b>89,460</b>	<b>96,201</b>	<b>103,505</b>	<b>111,425</b>	<b>120,015</b>	<b>129,336</b>	<b>139,455</b>	<b>150,446</b>	<b>162,388</b>	<b>1,381,928</b>

### Implementation Costs - 1 Yr Process

Case Management and BEP Modules	CY16	CY17	CY18	15-17	17-19
Stage 2 System Migration Planning		62,500			62,500
Data Migration - 3 years		400,000			400,000
Training (Up to 12 people)		0			
Interface to SFMS		0			
Base Migration Costs		0			
Discount @ 22%		-57,500			-57,500
<b>Migration Services</b>		<b>405,000</b>	<b>0</b>		
Training - 60 staff			35,000		35,000
Dry Run Migration			30,000		30,000
Additional Stage 2 Costs		32,500			32,500
BE Additional Module		30,000	6,250		36,250
<b>Total For Libera Cost of Migration</b>	<b>0</b>	<b>467,500</b>	<b>71,250</b>		<b>538,750</b>
Project Manager		83,250	27,750		101,038
<b>Total Migration Cost</b>	<b>0</b>	<b>550,750</b>	<b>99,000</b>		<b>639,788</b>



# Budget Narrative

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## Annual Performance Progress Report

# **Blind Commission**

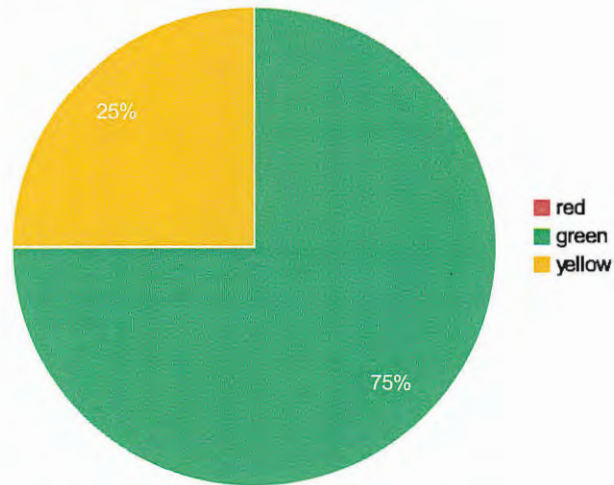
Annual Performance Progress Report

Reporting Year 2016

Published: 2/16/2017 3:40:03 PM

**KPM # Approved Key Performance Measures (KPMs)**

- 1 EMPLOYMENT - Percentage of individuals who enter into individualized plans for employment in the vocational rehabilitation program who are successful in reaching their outcome.
- 2 INDEPENDENT LIVING - Percentage of older individuals who complete independent living services who self assess as having an increase in confidence, skills, and abilities.
- 3 CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.
- 4 BEST PRACTICES - Percent of total best practices met by the Commission.

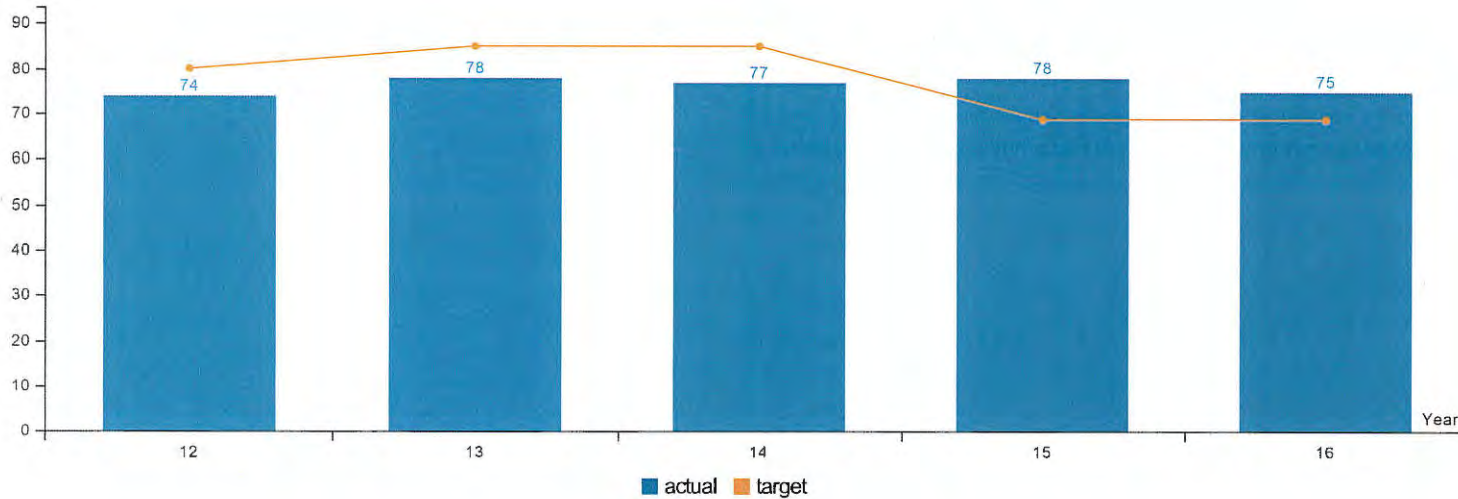


**Performance Summary**

Summary Stats:

Green	Yellow	Red
= Target to -5%	= Target -6% to -15%	= Target > -15%
75%	25%	0%

**KPM #1 EMPLOYMENT - Percentage of individuals who enter into individualized plans for employment in the vocational rehabilitation program who are successful in reaching their outcome.**  
 Data Collection Period: Oct 01 - Sep 30



Report Year	2012	2013	2014	2015	2016
<b>Employment Rate</b>					
Actual	74	78	77	78	75
Target	80	85	85	68.90	68.90

**How Are We Doing**

**1. OUR STRATEGY**

The agency focuses on providing highly specialized, state of the art, individualized rehabilitation services to eligible Oregonians who are blind in order to assist them in reaching their employment goals. We believe that a holistic approach to rehabilitation leads to long-term, successful outcomes and given the right tools and resources that Oregonians who are blind can fully participate in employment and achieve their full potential in the workforce.

**2. ABOUT THE TARGETS**

In the 2013 legislative session, our target/goal was reduced from 85% to the national average of 68.9%.

**3. HOW WE ARE DOING**

The agency now has a similar standard to the Rehabilitation Services Administration, which is set at 68.9%. The agency has regularly met or exceeded this performance measure. This rate allows for the variance in program and economic conditions that are critical to evaluating the agency performance over time. We anticipate that our overall performance will continue. For this reporting period (FFY 2015- October 1 2014 through September 30 2015), we have again exceeded the target of 68.9% at an employment rate of 75%.

#### **4. HOW WE COMPARE**

The national standard is 68.9%. In most years, including FFY 2015, the agency has exceeded this standard.

#### **Factors Affecting Results**

#### **5. FACTORS AFFECTING RESULTS**

Since we are a voluntary program, individuals can select not to complete their program. In addition, another factor that can affect the employment outcome is the economy within the state and the specific area in which the person is residing.

#### **6. WHAT NEEDS TO BE DONE**

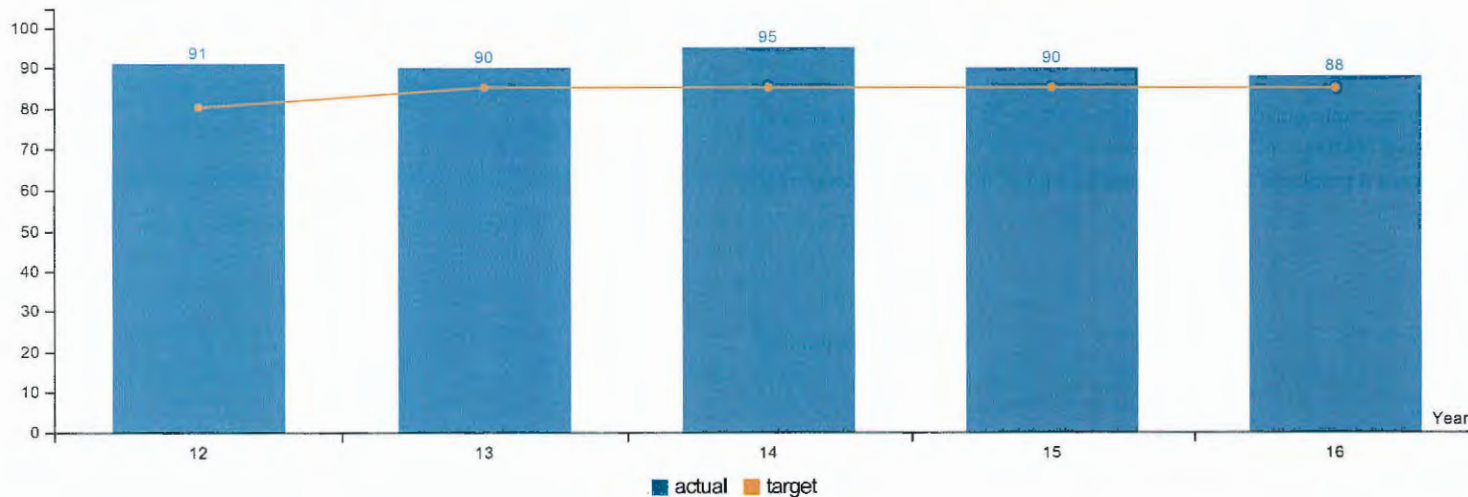
The agency will continue to work with our staff, commissioners, and constituents to find creative ways to improve our service delivery system in order to improve our outcomes. We are currently working on initiatives that are focused on improving the competitive skills of job seekers in our program and we are optimistic this effort will assist us in maintaining our strong performance.

#### **7. ABOUT THE DATA**

The data is captured from the automated case management system that captures federal reporting information.

KPM #2 INDEPENDENT LIVING - Percentage of older individuals who complete independent living services who self assess as having an increase in confidence, skills, and abilities.

Data Collection Period: Oct 01 - Sep 30



Report Year	2012	2013	2014	2015	2016
<b>Independent Living</b>					
Actual	91	90	95	90	88
Target	80	85	85	85	85

**How Are We Doing**

**1. OUR STRATEGY**

Our strategy is to provide specialized teaching services to individuals who are older blind in order to instill confidence and provide alternative skills to perform daily tasks within their homes and communities. We believe that with teaching interventions, we maximize an individual's independence in their homes. If Oregonians remain independent in their home instead of opting for higher levels of care such as assisted living or nursing facilities, we are honoring the independence of our mature citizens as well as providing a significant cost savings to the state.

**2. ABOUT THE TARGETS**

The 2011 Legislature set the target at 85%. The agency is committed to reaching this target.

**3. HOW WE ARE DOING**

The agency is performing at or above target with this measure. The older blind independent living program provides services to individuals who are age 55 and older who are experiencing challenges due to a decline in their vision. Federal eligibility allows individuals aged 55 and older to receive services. At OCB, over

80% of the individuals served on average are over age 75 and these clients have a strong desire to remain independent for as long as they are able.

#### **Factors Affecting Results**

#### **4. FACTORS AFFECTING RESULTS**

The agency is working with an aging population in this program. It is not uncommon for individuals to experience a medical setback that causes a decrease in their independent living functioning that was unrelated to the services provided by the agency.

#### **5. WHAT NEEDS TO BE DONE**

The Commission and agency staff believe that this program is consistent with Oregon core values as a state. Seniors being able to remain independent in their homes is a significant cost savings to other programs when nursing or assisted living programs can be delayed or become no longer necessary.

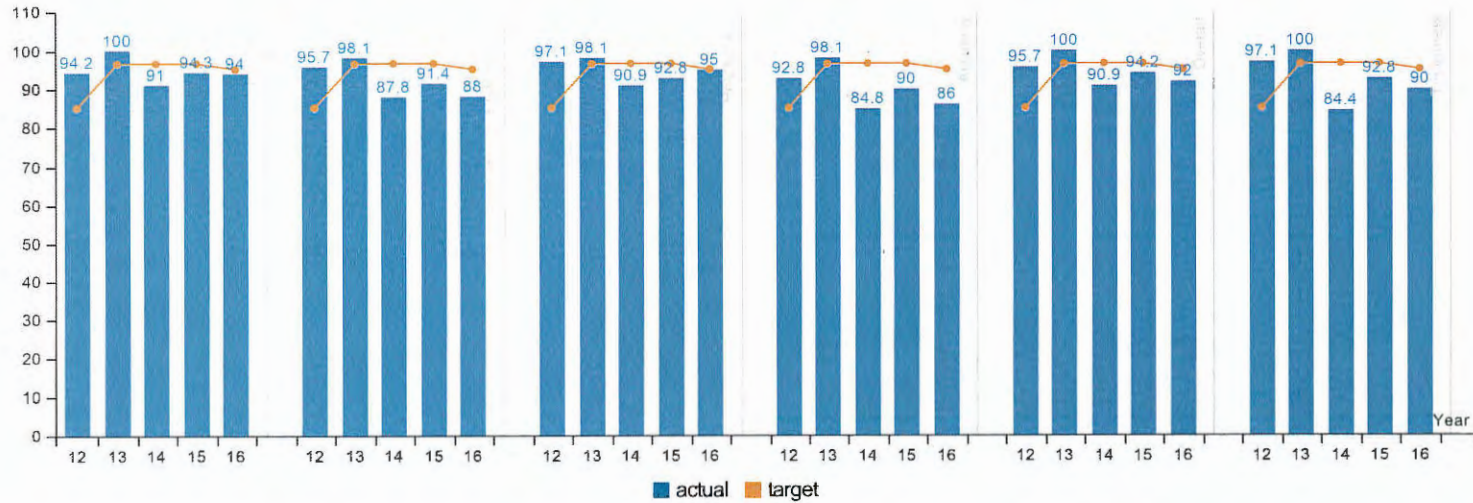
#### **6. ABOUT THE DATA**

This data was reported as part of the agency's closure information that is captured when a client's case record is closed at the end of services. Data is collected monthly and reported each FFY. This data is for FFY 2015 (October 1, 2014 through September 30, 2015).



KPM #3 CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.

Data Collection Period: Oct 01 - Sep 30



Report Year	2012	2013	2014	2015	2016
<b>Expertise</b>					
Actual	94.20	100	91	94.30	94
Target	85	96.50	96.50	96.50	95
<b>Availability of Information</b>					
Actual	95.70	98.10	87.80	91.40	88
Target	85	96.50	96.50	96.50	95
<b>Helpfulness</b>					
Actual	97.10	98.10	90.90	92.80	95
Target	85	96.50	96.50	96.50	95
<b>Accuracy</b>					
Actual	92.80	98.10	84.80	90	86
Target	85	96.50	96.50	96.50	95
<b>Overall</b>					
Actual	95.70	100	90.90	94.20	92
Target	85	96.50	96.50	96.50	95
<b>Timeliness</b>					
Actual	97.10	100	84.40	92.80	90
Target	85	96.50	96.50	96.50	95

How Are We Doing



## **1. OUR STRATEGY**

The agency has conducted customer satisfaction surveys for several years prior to the adoption of these standardized measures for all agencies. Each year we seek input from clients who have obtained services in the Vocational Rehabilitation Program to determine how we can improve service delivery and identify any systemic issues that should be addressed. Our questions were developed in partnership with our Commission board, and each year they assist in the execution of the survey.

## **2. ABOUT THE TARGETS**

We have an ongoing commitment to addressing issues as they arise and the satisfaction survey is one tool for us to monitor how we are doing. In 2011, these targets were increased by the Legislature. The agency will continue to make efforts to meet the increased targets, however the increased expectations in the environment of declining resources was noted by the Commission and those concerns were expressed in response to the change.

## **3. HOW WE ARE DOING**

The agency believes that we maintain a high standard of customer service. We are confident that as we continue to survey our constituents, we will be able to set a target that is reflective of Oregon's priorities for state agencies.

## **4. HOW WE COMPARE**

The agency understands the purpose and intent a statewide customer service measure. We do have concerns about some of the applicability of the questions to the type of business that we conduct as a rehabilitation agency. For example, the question about whether or not the agency does things accurately the first time. Our objective is to provide rehabilitation services that meet the needs of an individual. It is not uncommon for us to try various alternatives in order to find the one most suitable for the individual. We are dynamic and flexible in meeting the rehabilitation needs of our clients.

### **Factors Affecting Results**

## **5. FACTORS AFFECTING RESULTS**

We believe that one factor that impacted results for prior years was the delay between the time an individual receives services and the time they were surveyed. We have begun to survey clients monthly in FFY 2016 in order to allow respondents to be able to reflect as accurately as possible on their experience.

## **6. WHAT NEEDS TO BE DONE**

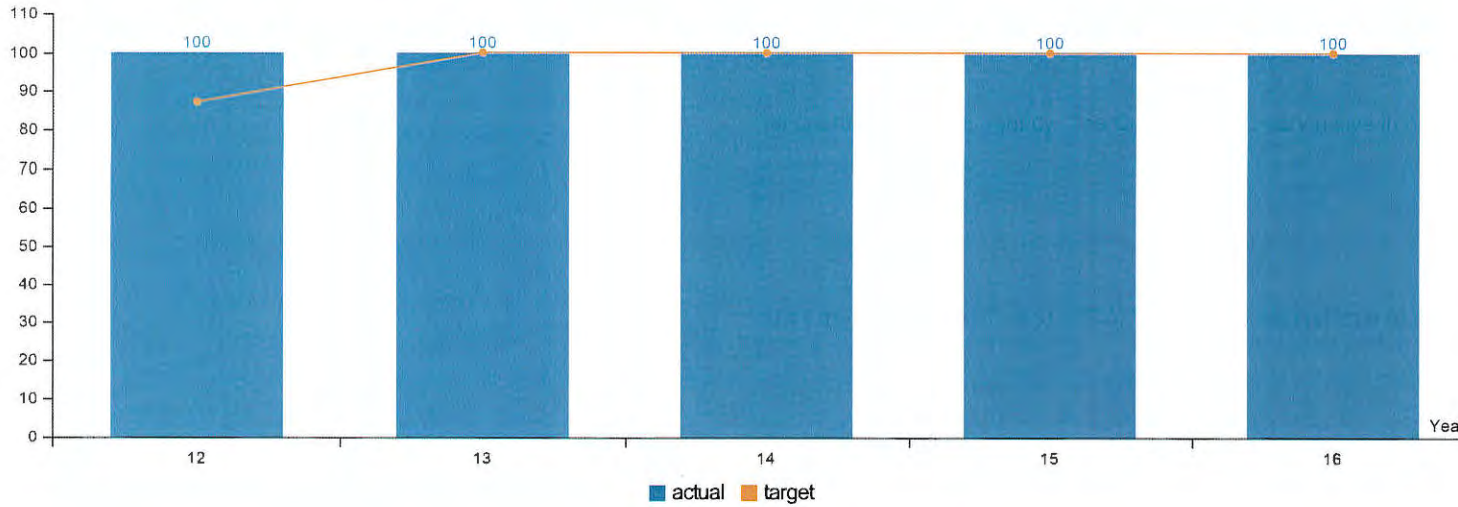
The agency is interested in continuing to utilize these measures for the purposes of program improvement.

## **7. ABOUT THE DATA**

These questions were included as part of the agency's customer satisfaction survey that is conducted annually via on-line or telephone (clients choose preference) to all participants who exit the vocational rehabilitation program. Surveys are conducted in each FFY. This data is for FFY 2015 (October 1, 2014 through September 30, 2015).

**BEST PRACTICES - Percent of total best practices met by the Commission.**

Data Collection Period: Oct 01 - Sep 30



Report Year	2012	2013	2014	2015	2016
<b>Best Practices</b>					
Actual	100%	100%	100%	100%	100%
Target	87%	100%	100%	100%	100%

**How Are We Doing**

**1. OUR STRATEGY**

The Commission for the Blind exercises oversight in policy, priorities, and fiscal operations for the agency. The Commission is very active in high level decisions regarding the agency goals and strategic planning, policies, budget and fiscal issues related to the agency.

**2. ABOUT THE TARGETS**

The agency had set a target of 14/15 best practices, 87%. This was increased by the 2011 Legislature to 100%. The agency will continue to make efforts to meet this target.

**3. HOW WE ARE DOING**

The Commission has met all of the best practices for this year.

**4. HOW WE COMPARE**

The Commission for the Blind sets policies and priorities for the agency and provides fiscal oversight. This role includes performing functions outlined in the best practices.

**Factors Affecting Results**

**5. FACTORS AFFECTING RESULTS**

The Commission is active within the agency and participates in staff related training and activities. They are connected to the agency mission and are committed to providing leadership on issues that impact the lives of Oregonians who experience vision loss.

**6. WHAT NEEDS TO BE DONE**

The Commission will continue to be active with the agency management team in decisions regarding the agency goals and strategic planning, policies, budget, and fiscal issues related to the agency.

**7. ABOUT THE DATA**

This is an assessment of the Commission for the Blinds practices.

# Budget Narrative

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## Audit Response Report

*Last Secretary of State audit was in 2011. Not applicable to this biennium budget.*

# Budget Narrative

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## Affirmative Action Plan

2017-  
2019

# Affirmative Action Plan

**OREGON  
COMMISSION  
FOR THE  
BLIND** *Expanding Opportunities  
for Oregonians with  
Vision Loss*

- 322 -

Dacia Johnson  
Executive Director  
2017-2019



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## Description of Agency

For over 70 years, the Oregon Commission for the Blind has been a resource for Oregonians who are visually impaired as well as their families, friends, and employers. We have nationally recognized programs and staff that make a difference in people's lives every day.

## Mission and Objectives

### Mission

The Oregon Commission for the Blind was established in 1937 as a state agency and evolved over time to be a consumer driven organization with a citizen governing body appointed by the Governor. Today, the agency receives policy direction and oversight from a seven-member Commission representing consumer organizations, education, ophthalmology/optometry, business and individual citizens. It is required that the majority of the seven members of the Commission are person who experience blindness. These leaders of the organization have charged the agency with the important task of becoming an exemplary service provision entity with state government.

The mission of the Commission for the Blind is to Empower Oregonians who are blind to fully engage in life.

### Objectives

The Commission for the Blind has five major program objectives in service to our mission:

- Helping Oregonians who are blind get and keep jobs that allow them to support themselves and their families;
- Training Oregonians in the alternative skills related to blindness such as adaptive technology, white cane travel, braille, and activities of daily living;
- Helping seniors and individuals with vision loss (who are unable to work) live with the highest levels of independence and self-sufficiency so that they can remain independent in their homes and active in their communities;
- Licensing and supporting business owners who operate food service and vending operations in public buildings and facilities throughout the state;
- Executing business functions and providing administrative support for agency programs that ensure effective and efficient use of resources delivering high quality service and outcomes.

### We Serve

**Oregonians who are blind and visually impaired** who require rehabilitation services in order to be employed or live independently in their community. Legal blindness is vision less than 20/200 or with less than a 20-degree field of vision with best correction.

**Businesses in Oregon** who have, or are considering hiring, employees who are legally blind.

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## We Provide

**A continuum of services** from youth transition to services for seniors who experience vision loss. ORS 346.110

**Employment counseling**, training and job placement, individual and group counseling addressing adjustment to blindness. ORS 346.180

**Technology Services**, adaptive equipment and software customized to meet needs of individuals and employer work sites. ORS.346.180

**Resources for businesses** interested in hiring or retaining employees who are experiencing vision loss and for Oregonians seeking information and referral regarding visual impairment. ORS 346.180

**Training** that enables individuals who are experiencing vision loss to remain independent in their homes and communities, and training in adaptive skills which increase work readiness. ORS 346.250

**Public education** on the abilities of people who are blind or visually impaired. ORS 346.170

**Small business opportunities** in public buildings and on public property via the Business Enterprise program. ORS 346.520

**A registry** of Oregonians who are legally blind. ORS 346.160

## Name of Agency Executive Director

**Dacia Johnson**, 535 SE 12<sup>th</sup> Ave., Portland, Oregon 97214, 971-673-1588

## Name of Governor's Policy Advisor

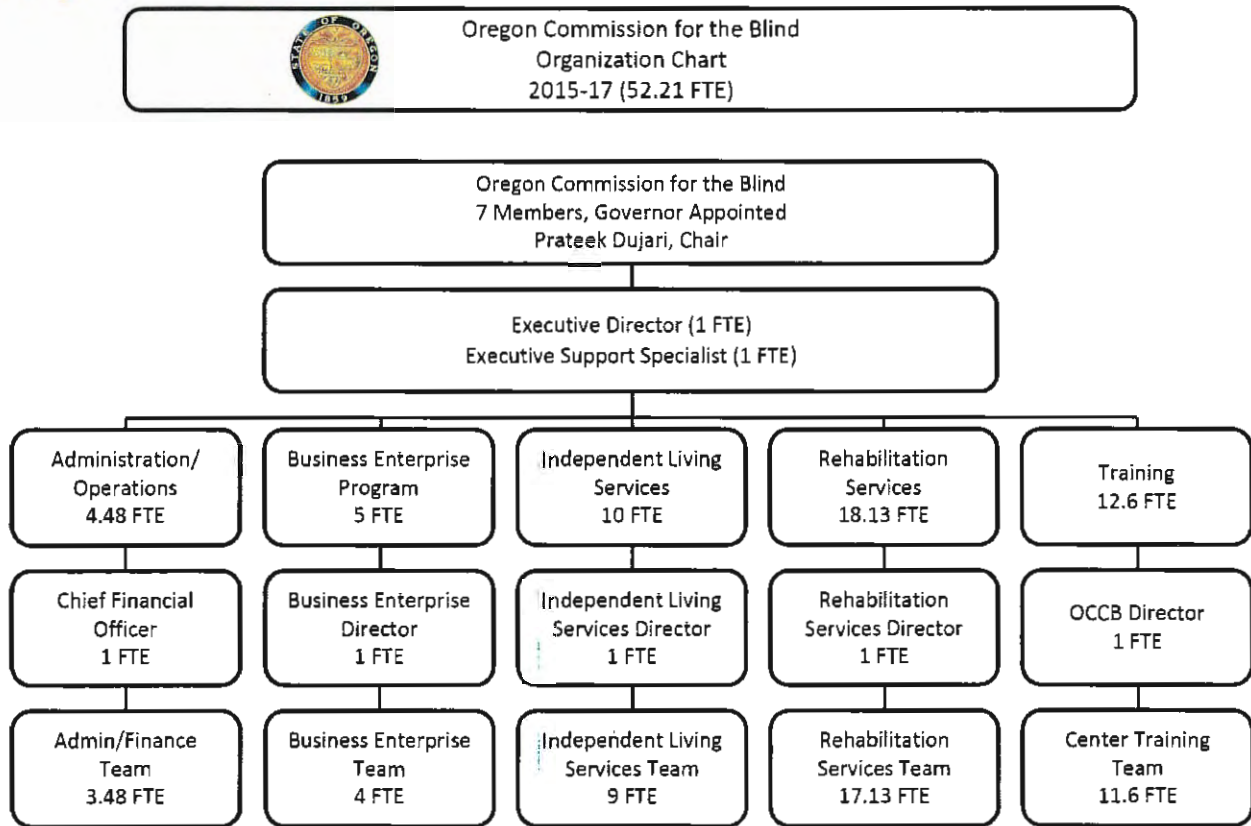
**Eiana Pirtle-Guiney**

## Name of Affirmative Action Representative

**Gail AB Stevens**, 971-673-1600

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# Organizational Chart



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## Affirmative Action Plan

It is the policy of the State of Oregon that employment without discrimination is recognized as and declared to be a civil right. The State of Oregon is committed to achieving a workforce that represents the diversity of Oregon community and is a leader in providing its citizens fair and equal employment opportunity.

Accordingly, the Oregon Commission for the Blind shall:

1. Maintain a policy of equal treatment and equality of opportunity in employment for all applicants and employees in its employment decisions, which include, but are not limited to: hiring, promotion, demotion, transfer, termination, layoff, training, compensation, benefits, and performance evaluations.
2. Apply all terms, conditions, benefits, and privileges of employment with the agency to all applicants and employees regardless of race, color, religion, age, sex, sexual orientation, marital status, national origin, political affiliation, disability, or any other reason prohibited by the law or policy of the state or federal government.
3. Adopt and disseminate the Oregon Commission for the Blind Affirmative Action Plan that describes the affirmative action being taken by the agency to ensure equity of employment in a work environment that is free from discrimination.

## Agency Affirmative Action Policy & Diversity and Inclusion Statements

The Oregon Commission for the Blind (OCB) is committed to achieving a work force that represents the diversity of Oregon's population and to providing fair and equal employment opportunities. OCB is committed to an affirmative action program that provides equal opportunities for all persons regardless of race, color, religion, sex, sexual orientation, national origin, marital status, age or disability. OCB provides an environment for each applicant and employee that is free from sexual harassment, as well as harassment and intimidation on account of an individual's race, color, religion, gender, sexual orientation, national origin, age, marital status or disability. OCB employment practices are consistent with the State's Affirmative Action Plan Guidelines and with state and federal laws, which preclude discrimination.

## For Individuals with Disabilities

OCB will not discriminate, nor tolerate discrimination, against any applicant or employee because of physical or mental disability in regard to any position for which the known applicant for employment is qualified.

OCB agrees to take affirmative action to employ, advance in employment, and otherwise treat known qualified individuals with disabilities without regard to their physical or mental disabilities in all human resources selection and decision practices, such as: advertising, benefits, compensation, discipline (including probation, suspension, and/or termination for cause or layoff), employee facilities, performance evaluation, recruitment, social/recreational programs, and training. OCB will also continue to administer these practices without regard to race, color, religion, gender, sexual orientation, national origin, age, marital status or disability. Additionally, all applicants and employees are protected from coercion, intimidation, interference, or discrimination for filing a complaint or assisting in an investigation under this policy.

### **For Members Uniform Services (ORS 659A.082)**

OCB will not discriminate or tolerate discrimination, against any employee because they are a member of, apply to be a member of, perform, has performed, applied to perform or have an obligation to perform service in a uniformed service.

It is also the policy of OCB to provide an environment for each applicant and employee that is free from sexual harassment, as well as harassment and intimidation on account of individual's race, color, religion, gender, sex, sexual orientation, marital status, national origin, age, familial status or disability.

### **Dissemination of the Affirmative Action Policy and Plan**

The impact of the Affirmative Action Plan can be fully realized only to the extent that its provisions are known by those who must apply it and those who benefit from it. With this in mind, the following describes methods used to disseminate the information both internally and externally.

The responsibility for dissemination of the agency's Affirmative Action Policy Statement and Affirmative Action Plan has been delegated to the Affirmative Action Representative. Such communication is both internal and external, and will include, but is not limited to:

#### Internal Dissemination

The Executive Director shall:

##### **FOR EMPLOYEES:**

- Communicate the plan to all employees in order for employees to:
  - Be aware of the plan.
  - Be aware of their individual responsibilities for effective implementation of the plan.

- Make Affirmative Action Plan and Policy available for employees in the agency electronic shared folders.
- Annually all policies shall be provide to all agency employees for review and acknowledgement.

**FOR MANAGEMENT:**

- Conduct meetings to explain the intent of the Affirmative Action Plan.
- Distribute the plan to all who have the authority to recruit, hire, train, and/or promote.
- Review with each their responsibility for achieving the agency's affirmative action goals and objective and provide relevant information throughout the year.

**NEW HIRE ORIENTATION:**

- Include the following as part of each new hire's orientation:
  - Affirmative Action Policy
  - Affirmative Action Plan
  - Grievance Procedure

External Dissemination

- All recruitment announcements, applications for employment, and newspaper advertisements will contain the phrase, "An Equal Opportunity Employer",
- OCB's Affirmative Action Plan is posted on the agency's internet site and made available to the public upon request.
- Provide copies of the agency's Affirmative Action Policy Statement, Affirmative Action Plan and Grievance Procedure to any person, including job applicants, upon request.
- Notify interested bidders, contractors, subcontractors and suppliers of the agency's affirmative action policy when requested. Notices shall include a statement that the agency will not knowingly do business with any bidder, contractor, subcontractor, or supplier of materials that discriminates against members of any protected class.

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**Monitoring and Reporting System**

The Affirmative Action Representative will monitor the Affirmative Action Plan on a continual basis. Monitoring will include, but not be limited to:

1. Monitoring the auditing and reporting system. Reporting and auditing includes:
  - a. The maintenance of accurate and up-to-date records on all applicants, hires, promotions, transfers, and terminations by sex, race, and EEO-4 categories;
  - b. The review of all promotions, transfers, and terminations to be certain that all employees are treated fairly and equitably; and



- c. The review of all selection, promotional, and training procedures to ensure non-discriminations in practice
2. Report annually to the Executive Director on the effectiveness of the affirmative action program, progress and efforts made toward accomplishing affirmative action goals, and planned action and recommendations for improvement, if necessary.
3. Review the effectiveness of managers and supervisor's efforts in achieving affirmative action goals and objectives as a key consideration in the performance appraisal system as required by ORS Ch. 240.
4. Prepare updates and evaluations of the Affirmative Action Plan to be submitted to the Governor's Affirmative Action Office as required. An Affirmative Action progress report will also be prepared and submitted as part of the agency's budget submission.

### **Complaint Process regarding Discrimination or Harassment**

The complaint procedure provides a method of resolving complaints involving violation of the OCB nondiscrimination policy within the agency. Employees and applicants are encouraged to use the complaint process. Retaliation, coercion, reprisal, or intimidation against a person who has filed a complaint either internally or through an outside enforcement agency or other legal channels or serving as a witness is prohibited.

#### Informal Complaint Process

An employee may notify the Affirmative Action Representative of an issue or concern regarding discrimination in order to raise awareness or put the agency on alert without filing a formal complaint. In these situations:

1. The employee may ask the Affirmative Action Representative to keep the matter and identify of the employee confidential. (The agency will comply with the request, if possible.)
2. The employee will sign documentation stating that he/she wishes his/her identity to remain confidential.
3. The discussion will be documented.
4. The Affirmative Action Representative will review the information and notify management at the level sufficient to maintain confidentiality of the employee's identity when it is determined that action is necessary to correct the problem or to prevent a reoccurrence in similar situations.

5. The Affirmative Action Representative will offer suggestions to management on preventable actions such as training and changes in environment.

#### Internal Complaint Process

1. Any individual who believes he/she has been subjected to unlawful discriminatory actions may file a complaint within 30 calendar days of the alleged incident.
2. Represented employees may file a complaint either through the Collective Bargaining Agreement grievance procedure or by using the procedures provided by the agency.
3. An employee may submit a written complaint to Affirmative Action Representative that explains the basis for the complaint, identifies the alleged discriminating party or parties, the date the discriminatory action(s) occurred, and specifies the relief requested.
4. Affirmative Action Representative will review/investigate the complaint and provide the complaint written notification of the findings within 30 days or upon completion. If additional time is needed for investigating the allegations or to issue a report of the findings, the agency will notify the employee in writing of the need for additional time.
5. If the investigation substantiates the complaint, appropriate corrective action will be initiated, include discipline if warranted.

#### External Complaint Process

If an employee is not satisfied with the complaint process within the agency and wishes to appeal to an agency decisions may contact one of the organization listed below. Nothing in this policy prevents any person from filing a grievance in accordance with the Collective Bargaining Agreement or a formal complaint with the Bureau of Labor and Industries (BOLI) or Equal Employment Opportunity Commission (EEOC). However, some collective bargaining agreements may require an employee to choose between the complaint procedure outline in the agency's guideline for filing a BOLI or EEOC complaint.

#### **Oregon Bureau of Labor and Industries - Civil Rights Division**

State Office Building  
800 NE Oregon Street, MS# 32, Suite 1070  
Portland, OR 97232  
Phone Number: 503.731.4874  
Fax Number: 503.731.4069

The Oregon Bureau of Labor and Industries - Civil Rights Division is the Oregon state equivalent of the federal EEOC. As a designated Fair Employment Practices Agency (FEPA),

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the Oregon Bureau of Labor and Industries - Civil Rights Division may coordinate operations with the EEOC under a work-share agreement. Furthermore, the Oregon Bureau of Labor and Industries - Civil Rights Division investigates state claims that are not covered by federal law or exceed the basic protections of federal law. Individuals filing a charge of discrimination with the EEOC should also file a copy of the charge with the Oregon Bureau of Labor and Industries - Civil Rights Division.

<p><b>Eugene</b></p> <p><b>Oregon Bureau of Labor and Industries</b></p> <p>1400 Executive Parkway, Suite 200 Eugene, OR 97401 Phone Number: 541.686.7623</p>	<p><b>Portland</b></p> <p><b>Oregon Bureau of Labor and Industries</b></p> <p>800 NE Oregon Street, Suite 1045 Portland, OR 97232 Phone Number: 971.673.0761</p>
<p><b>Pendleton</b></p> <p><b>Oregon Bureau of Labor and Industries</b></p> <p>1327 SE 3rd Street Pendleton, OR 97801 Phone Number: 541.276.7884</p>	<p><b>Salem</b></p> <p><b>Oregon Bureau of Labor and Industries</b></p> <p>3865 Wolverine Street NE; E-1 Salem, OR 97305 Phone Number: 503.378.3292</p>

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**Governor’s Office of Diversity & Inclusion/Affirmative Action**

255 Capitol Street, NE  
Suite 126  
Salem, OR 97301  
Tel: 503.986.6524  
Website: [www.Oregon.gov/gov/GovAA/Pages/index.aspx](http://www.Oregon.gov/gov/GovAA/Pages/index.aspx)

**U.S. Equal Employment Opportunity Commission**

Seattle Field office EEOC Office/ Federal Office Building  
909 First Avenue, Suite 400  
Seattle, WA 98104  
Phone Number: 206.220.6883 Phone Number: 206.220.6882 (TDD)

The EEOC does not maintain an office in Oregon. The Seattle Field Office is open Monday –  
File a Charge of Discrimination: <http://www.eeoccomplaint.com/>

**Department of Labor, Office of Federal Contract Compliance (OFCC)**

1315 SW Fifth Avenue, Suite 1030  
Portland, OR 97201  
Phone Number: 503.326.4112

**The U.S. Department of Labor**

Pacific Regional Office 71 Stevenson Street, Suite 1700  
San Francisco, CA 94105  
Phone Number: 503.848.6969

**The Civil Rights Office of Health & Human Services**

Office of Civil Rights, Region D  
2201 Six Avenue, Mail Stop RX-11  
Seattle, WA 98121  
Phone Number: 206.615.2290      Phone Number: 206.615.2296 (TDD)

The Commission for the Blind remains committed to its policy on Affirmative Action and Equal Opportunity and to a rigorous and active affirmative action program. My personal commitment to these ideas is represented in the Affirmative Action Plan. Likewise, the Plan represents OCB's commitment to equal opportunity and affirmative action in employment and public service consistent with all applicable federal and state laws, including, but not limited to: Executive Order 11246; Title VII of the Civil Rights Act of 1964; Sections 503 and 504 of the Rehabilitation Act of 1974; the Vietnam Era Veterans Readjustment Assistance Act; and the Americans with Disabilities Act. This Affirmative Action Plan has my complete authorization and commitment.

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Dacia Johnson, Executive Director

\_\_\_\_\_  
Date

If you have any questions regarding the agency's Affirmative Action Plan please contact the Affirmative Action Representative.

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## Training, Education, and Development Plan (TEDP)

### Employees

OCB recognizes that its employees are its greatest resource. Investing in employee development and enhancing employee knowledge, skills and abilities is one of the agency's highest priorities.

Continued professional development and training opportunities ensures that employees are provided with the skills needed to excel in their work, and therefore be retained in the agency. OCB uses a variety of approaches to establish a climate that supports continuous learning and development through the following:

1. New Employee Orientation – Effectively orienting new employees to the agency and to their positions is critical to establishing successful, productive working relationship. OCB strives to ensure the employee's first interaction with agency personnel is a positive experience. OCB provides the following information to the new employee:
  - Affirmative Action Policy and Affirmative Action Plan
  - Agency's expectation of employee
  - Agency's mission and objectives
  - Discrimination and Harassment-Free Workplace Policy;
  - Employee Services
  - Performance Evaluation Process
  - Professional Workplace Policy;
  - Roles and Responsibilities/Position Description
  - Safety
  - Training, Educational, and Developmental Plan
2. Continuing Educational Reimbursement – OCB provides this opportunity to eligible employees to obtain and maintain, or improve their professional capabilities through participation in courses of study at accredited colleges and universities, and at accredited organizations specializing in job and career related training.
3. Job Rotation – Provide the employee the opportunity to explore new assignments or jobs and to provide agencies the opportunity to enhance employee development to make more effective use of staff:
  - a. Developmental rotation provides the employee the opportunity to acquire new skills.
  - b. Career enrichment rotation provides the employee the opportunity to use existing skills in a different setting.

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4. Provide training opportunities for all employees. Through investments in training, OCB reflect the value we place on our employees and support employee interest in keeping their skills updated in order to remain competitive.
- Annual OCB training
  - External training courses
  - iLearn Oregon
  - Career Development programs
  - Continuing Learning Opportunity:
    1. Angelou, Maya. *I Know Why the Caged Bird Sings*. Bantam Books, 1983.
    2. Dickerson, Debra. *An American Story*. New York, NY: Pantheon Books, 2000
    3. Fanon, Frantz. *Black Skins, White Masks*. Grove Press, 1991.
    4. Kochman, Thomas. *Black and White Styles in Conflict*. Chicago: University of Chicago Press, 1983.
    5. McBride, James. *The Color of Water*. Riverhead Books, 1997.
    6. McCall, Nathan. *Makes Me Wanna Holler: A Young Black Man in America*. Vintage Books, 1995.
    7. Meeks, Kenneth. *Driving While Black*. Broadway Books, 2000.
    8. Reed, Cecil and Donovan Priscilla. *Fly in the Buttermilk*. Iowa City, IA: University of Iowa Press, 1993.
    9. Robinson, Randall N. *The Debt: What America Owes to Blacks*. Plume, 2001.
    10. Santiago, Esmeralda. *When I Was Puerto Rican*. Vintage Books, 1994.
    11. Tatum, Beverly D. *Why Are All the Black Kids Sitting Together in the Cafeteria?* Basic Books, 1999.
    12. West, Cornell. *Race Matters*. Vintage Books, 1994.
    13. Wilson, M. and Russel, K. *Divided Sisters: Bridging the Gap Between Black Women and White Women*. New York, NY: Anchor/Doubleday, 1996.
    14. Amsterdam, Boston, **The Diversity Scorecard: Evaluating the Impact of Diversity on Organizational Performance**, Elsevier Science/Butterworth-Heinemann; 2003.
    15. Rikleen, Lauren, **Ending the Gauntlet: Removing Barriers to Women's Success in the Law - by Managing Differently** – James O. Rodgers,
    16. Aguilar, Leslie **Multicultural Customer Service: Providing Outstanding Service Across Cultures**, Linda Stokes McGraw-Hill, Inc, Times Mirror Press -
    17. Phil Rubio, *A History of Affirmative Action, 1619-2000*
    18. Poverty & Race Research Action Council: <http://www.prrac.org/>
    19. Civil Rights Coalition for the 21<sup>st</sup> Century: <http://www.civilrights.org/>
    20. Americans for a Fair Chance: <http://fairchance.civilrights.org/>
    21. National Center for Fair and Open Testing: <http://www.fairtest.org/>
    22. Journal of Blacks in Higher Education: <http://www.jbhe.com/>

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## Volunteers

The agency embraces the idea that supporting volunteers in training and professional development is an important role. Many of the above mentioned training opportunities are available for volunteers. Additionally, the agency makes volunteer opportunities available to volunteers when possible.

## Vendors / Contractors

**Professional Service Contractors:** Majority of OCB vendors are in the personal services. These vendors are specifically trained in serving our clients with disabilities and are work as advocates for the disabled population.

**Non-Professional Service Contracts:** This is the population is vendors that our agency sends the most time working directly with. OCB continues to work with each vendor to ensure full access of all OCB employees. Specific examples include:

- **New IBM Phones Accessibility:** Ensuring the new phone system for the State of Oregon include a solution for accessibility. Currently, with the CenturyLink VOIP phones, Access-a-Phone software is used to make the physical phone accessible for employees whom are blind or visually impaired. OCB is working directly with Unify on development of the accessibility solution.
- **Office Alarms System:** OCB worked directly with ADT in Medford to ensure a solution was included in the new office security alarm that included a speaking control panel and an adaptive key for activating and deactivating the alarm.

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## Programs

### Internship Programs

The Commission for the Blind works in conjunction with Portland State University and Western Oregon University requesting internship hours to students entering the rehabilitation profession in partnership institutions of higher. Internships are based on availability and performance, and the university we partner with have their own goals for Affirmative Action so this agency does not track demographics on this group.

### Mentorship Programs

The Commission for the Blind does not currently have a mentorship program. The Commission is not planning to create a mentorship program in 2017-19.

### Community Outreach Programs

The Commission for the Blind has a limited statewide community outreach campaign that is designed to target individuals who would benefit from the services available through the

vocational rehabilitation and independent living programs within the agency. The campaign may be reduced in 2017-19 due to budget reductions current anticipated. Direct service to clients is the mission and priority of the agency and the organic referral pathways allow the agency to achieve maintenance of current service levels, which is in direct correlation with projected staffing levels.

OCB employees are advocates for persons with disabilities in the community and work directly with employers.

### **Diversity Awareness Program(s)**

Each year the agency participates in activities related to disability awareness through the National Disability Employment Awareness Month, which takes place in October. We work toward educating the business community about the capabilities of individuals who are blind in the workforce. We also work with other community organizations to hold events around the state for White Cane Safety Day, held October 15<sup>th</sup> each year. White Cane Safety Day is designed to educate the public on the white cane law and the importance of awareness of safety surrounding pedestrians who are legally blind.

The agency displays artwork by artists who are blind.

### **Leadership Development/Training Program(s)**

Leadership Oregon – If financial resources allow OCB will support and provide an employee the opportunity to participate in the Leadership Oregon program. This program enhances the professional development of the State of Oregon employees through an interactive and practical curriculum that expands an awareness of self, state government and local communities while promoting pride in public service.

### **Executive Order 16-09 Updates**

#### Respectful Leadership Training (Diversity, Equity and Inclusion)

Agency management is committed to maintaining a culture of inclusion for employees that is based on listening and engaging with employees. We have defined behaviors that include the following:

- We encourage and expect our employees to raise concerns and listen to each other
- We have clear mechanisms for staff to raise and address concerns
- Employees are comfortable enough coming to management and trust we will work on and resolve issues
- There is no “wrong door” – any employee can come to any manager or HR to raise a concern
- Management is a team and will resolve issues together

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In addition, the agency leverages the expertise related to Diversity, Equity and Inclusion from the Chief Human Resources Office Shared Human Resources Services. Our Human Resource Manager assigned to the agency ensures that we maintain current, relevant information to ensure that we are aligned with the best practices for leadership.

The agency conducts a staff engagement survey two times per year that provides agency leadership with anonymous input into how they are feeling in terms of a connection to the agency and suggestions as to how their experience could be elevated.

#### Statewide Exit Interview Survey

Due to the agency size and specialized personnel, we experience little to no turnover on an annual basis. We expect this to change as many of our long term employees become eligible for retirement.

The agency's goal is to operationalize an exit survey for 2017-2019. Our goal is to continue to make OCB the "Employer of Choice", this survey will allow the employee to share their honest opinions regarding their work experience with the agency. As employees change agencies or depart from state employment, OCB is interested in how employees view their tenure and what information and suggestions they can provide related to their experience. The survey covers issues such as: benefits; working conditions; opportunities for career advancement; the quality and quantity of the workload; and relationships with co-workers and supervisors.

#### Performance Evaluations of All Management Personnel

OCB has incorporated the following performance evaluations for all agency management personnel. Evaluations include:

- a. Understand Equal Employment Opportunity (EEO), Affirmative Action (AA), Diversity and Cultural Competency principles, and the agency's AA Plan goals and objectives.
- b. Review hiring, transfers, promotional, developmental/rotational or training practices and procedures to identify and remove barriers in the attainment of the agency's affirmative action goals and objectives.
- c. Make hiring, transfer and promotional decisions in support of agency's affirmative action goals and objectives.

**Ref: 659A.012 State agencies to carry out policy against discrimination in employment; evaluation of supervisors; affirmative action reports.**

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(1) To achieve the public policy of the State of Oregon for persons in the state to attain employment and advancement without discrimination because of race, religion, color, sex, marital status, national origin, disability or age, every state agency shall be required to include in the evaluation of all management personnel the manager's or supervisor's effectiveness in achieving affirmative action objectives as a key consideration of the manager's or supervisor's performance.

(2) To achieve the public policy of the State of Oregon for persons in the state to attain employment and advancement without discrimination because of race, religion, color, sex, marital status, national origin, age or disability, every state agency shall be required to present the affirmative action objectives and performance of that agency of the current biennium and those for the following biennium to the Governor of the State of Oregon and to the Legislative Assembly. These plans shall be reviewed as part of the budget review process.

### **Status of Contracts to Minority Businesses (ORS 659A.015)**

The Commission for the Blind does not currently collect information in regards to status of a vendor as a minority-owned business. There are only 50 current RFA contracts. Effective immediately, the request of this status has been added to our RFA application and contract renewal procedures. The agency, in general, does not issue many contracts and when it does, they are usually quite specific in nature. It is not always possible to find a minority-owned business due to the specificity of the services required. The agency is always striving to hire such businesses when possible.

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## **Roles for Implementation of Affirmative Action Plan**

### **Responsibilities and Accountability**

OCB is committed to equal employment opportunity and maintains an active interest in the attainment of affirmative action goals and objectives. OCB's strategy is to create a work environment and employment opportunities that attract and retain diverse and skilled workforce. The success of the affirmative action program depends upon the commitment and leadership of employees at all levels in the organization. As such, affirmative action goals and objectives are contained in all management position description.

### **Executive Director**

The Executive Director plays a leadership role in dedicating the agency to a policy of equal employment opportunity and conveying a sense of that commitment both within and outside of the organization. The Executive Director has overall responsibility for implementing and

monitoring the Affirmative Action Plan and for ensuring compliance with all applicable federal and state laws, rules and regulations. The Executive agrees to:

- Foster and promote the importance of a diverse and respectful workplace.
- Periodically review the Affirmative Action Plan and progress toward meeting the agency's affirmative action objectives; and
- Recognize policy needs and initiate necessary changes.

Ensure managers and supervisors understand they are responsible for participating in and promoting affirmative action.

### Managers and Supervisors

"To achieve the public policy of the State of Oregon for persons in the state to attain employment and advancement without discrimination because of race, religion, color, sex, marital status, national origin, disability or age, every state agency shall be required in the evaluation of all management personnel the manager's or supervisor's effectiveness in achieving affirmative action objectives as a key consideration of the manager's and supervisor's performance."

- Foster and promote to employees the importance of a diverse, and discrimination and harassment free workplace through day-to-day interaction with employees and through discussion with staff about the agency's Affirmative Action Plan, activities, goals and objectives.
- Assure assigned managers and employees understand their rights and responsibilities in achieving a welcoming work environment free from discrimination and harassment.
- Promote the State of Oregon as an equal employment opportunity, affirmative action employer committed to workforce diversity in speeches and conversations with businesses and communities regarding employment with the State.
- Review the OCB affirmative action goals and objectives on a regularly basis to be aware of and consider ways to contribute toward achieving the goals and objectives. Review and consider the agency's affirmative action hiring goals in filling job vacancies.
- Ensure that individuals involved in agency processes needing materials in alternate format (large print, computer disc, Braille, audio tape, and/or oral presentation) receive material in the appropriate format.

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- Attend and encourage employees to attend diversity, cultural awareness, and affirmative action information session.
- Assure that all staff are aware of the Affirmative Action Policy Statement and Affirmative Action Plan, particularly as it applies to their unit, and maintain and maintain a copy of the Plan readily available for employees to review.
- Ensure that all employees, including minorities, women, persons with disability, and other protected persons, are provided an opportunity to participate in agency-sponsored education, training, and social activities.

### **Affirmative Action Representative**

- Foster and promote to employees the importance of a diverse, and discrimination and harassment free workplace through day-to-day interaction with employees and through discussion with staff about the agency's Affirmative Action Plan, activities, goals and objectives.
- Assure assigned managers and employees understand their rights and responsibilities in achieving a welcoming work environment free from discrimination and harassment.
- Promote the State of Oregon as an equal employment opportunity, affirmative action employer committed to workforce diversity in speeches and conversations with businesses and communities regarding employment with the State.
- Review the OCB affirmative action goals and objectives on a regularly basis to be aware of and consider ways to contribute toward achieving the goals and objectives. Review and consider the agency's affirmative action hiring goals in filling job vacancies.
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- Attend and encourage employees to attend diversity, cultural awareness, and affirmative action information session.
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- Ensure that all employees, including minorities, women, persons with disability, and other protected persons, are provided an opportunity to participate in agency-sponsored education, training, and social activities.

## July 1, 2015 – July 30, 2017

### Accomplishments

#### Employment

The Commission for the Blind has continued to excel in hiring and retaining people with disabilities, women in management, and women in professional groups. We provide a supportive and flexible environment for all employees. There are many diverse aspects of our staff, both in protected legal status and in worldview and experience.

- Nine of the agency's 57 employees have disabilities, or 15.78 percent. This is 1.6 employees above the agency's goal.
- Women are disbursed throughout the agency's organization structure, 41 of the 57 employees, or 71.92%. This is 0.7 employees above the agency's goal.
- Four of six management positions are held by women, and three of the six are people with disabilities.
- The agency employs five people of color, which is 2.9 employees above the agency's goal.
- The agency employs one disable veteran.

#### Community Outreach

- In the first half of the 2015-17 Biennium, OCB participated and attended 98 community outreach activities.

#### Training

Annual agency wide trainings 2015 included, but are not limited to:

##### 2015

- Working with Clients with Traumatic Brain Injuries and Blindness
- Diabetic Education
- Ethics
- Intellectual and Developmental Disability Client Understanding
- Autism Spectrum Disorder

##### 2016

- Growth vs. Fixed Mindset
- Client Outcome Driven Agency Brainstorming
- Diabetes Training
- Elder Abuse

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- Trauma Informed Card

## Progress Made or Lost Since Previous Biennium

The agency has:

- Increased the number of total number of women employed from 32/52 to 41/57, or 61.53% to 71.92%.
- Increased the number of management positions held by women from three to four.
- Decreased the number of people of color from six to five.
- Decreased the number of people with disabilities from eleven to nine.
- The agency exceeds the goals for **all categories**: Veterans, people with disabilities, people with disabilities in professional groups, people of color, total women, and women in professional groups.

## July 1, 2017 – June 30, 2019

### Goals

#### Employees

- Maintain high excellence in diversity and inclusion within the employees of the Commission for the Blind.
- Recruit nationally for all vacant positions, with the intent to attract a diverse applicant pool when a vacancy occurs.
- Represent the agency on Regional and Local Advisory Boards for Graduate Programs in Rehabilitation Counseling, emphasizing the importance of diversity among graduate students selected.

#### Community Outreach

- Continue to track community outreach activities to hold the gain and increase the level of community participation.
- Participate in community events and stakeholder meetings involving health providers, statewide policy groups, human resources professionals, hiring managers, and civic organizations such as Lions Club.

#### Strategies and Timelines

- Attend a minimum of 20 community outreach events quarterly.
- Provide training and continuing education through twice annual group training, second and fourth quarter.

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## Appendix A – State Policy Documentation

[http://www.oregon.gov/gov/policy/Documents/Federal\\_Affirmative\\_Action\\_TitleVII.pdf](http://www.oregon.gov/gov/policy/Documents/Federal_Affirmative_Action_TitleVII.pdf)

## Appendix B – Federal Documentation

[http://www.oregon.gov/gov/policy/Documents/State\\_Affirmative\\_Action.pdf](http://www.oregon.gov/gov/policy/Documents/State_Affirmative_Action.pdf)

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