

Legislative Fiscal Office

Oregon State Capitol
900 Court Street NE, H-178
Salem, OR 97301
503-986-1828



Joint Committee on Ways and Means

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Paul Siebert, Deputy Legislative Fiscal Officer (Audit/IT)

To: General Government Subcommittee
From: Zane Potter, Legislative Fiscal Office
Date: May 10, 2021
Subject: HB 5017 – State Library
Work Session Recommendations

State Library – Agency Totals

	2017-19 Actual	2019-21 Legislatively Approved	2021-23 Current Service Level	2021-23 LFO Recommended
General Fund	4,033,676	4,081,203	4,534,451	4,534,451
Other Funds	6,009,988	7,205,514	7,550,220	7,466,921
Federal Funds	4,611,084	5,285,859	5,581,208	5,000,000
Total Funds	14,654,748	16,572,576	17,665,879	17,001,372
Positions	42	41	40	40
FTE	40.04	39.04	38.47	38.47

The 2021-23 Legislative Fiscal Office recommended budget for the State Library is \$17,001,372 total funds and 40 position (38.47 FTE). This is a 2.6% increase from the 2019-21 Legislatively Approved Budget.

The proposed Key Performance Measures (KPMs) include revisions to three KPMs to more clearly articulate what is being measured. Also, the proposed KPMs include three new KPMs to survey customer satisfaction with State Library services and measure Ready to Read participation per grant dollar.

Adjustments to Current Service Level

See attached “Work Session Presentation Report.”

Note: Statewide adjustments and six-year capital construction expenditures are not included in these recommendations. Any needed adjustments will be made in end of session bills.

Performance Measures

See attached “Legislatively Proposed 2021-23 Key Performance Measures.”

Recommended Changes

LFO recommends a budget of \$4,534,451 General Fund, \$7,466,921 Other Funds, \$5,000,000 Federal Funds and 40 positions (38.47 FTE), which is reflected in the -1 amendment.

Final Subcommittee Action

LFO recommends that HB 5017, as amended by the -1 amendment, be moved to the Ways and Means Full Committee.

Carriers

Full Committee: _____

House Floor: _____

Senate Floor: _____

LFO102 - Work Session Presentation Report
2021-23 Biennium

Version: L - 01 - LFO Analyst Recommended
Cross Reference: 54300-000-00-00-00000
State Library

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2019-21 Agy. Leg. Adopted	4,200,159	-	6,987,429	5,221,519	-	-	16,409,107	41	39.04
2019-21 Ebds, SS & Admin Act	(118,956)	-	218,085	64,340	-	-	163,469	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2019-21 Leg Approved Budget	4,081,203	-	7,205,514	5,285,859	-	-	16,572,576	41	39.04
2019-21 Leg Approved Budget (Base)	4,200,159	-	6,987,429	5,221,519	-	-	16,409,107	41	39.04
Summary of Base Adjustments	190,034	-	383,275	134,325	-	-	707,634	(1)	(0.57)
2021-23 Base Budget	4,390,193	-	7,370,704	5,355,844	-	-	17,116,741	40	38.47
010: Non-PICS Pers Svc/Vacancy Factor	3,074	-	1,686	1,555	-	-	6,315	-	-
030: Inflation & Price List Adjustments	158,984	-	209,227	174,612	-	-	542,823	-	-
050: Fundshifts and Revenue Reductions	(17,800)	-	(31,397)	49,197	-	-	-	-	-
2021-23 Current Service Level	4,534,451	-	7,550,220	5,581,208	-	-	17,665,879	40	38.47
070: Revenue Reductions/Shortfall	-	-	(83,299)	(581,208)	-	-	(664,507)	-	-
Adjusted 2021-23 Current Service Level	4,534,451	-	7,466,921	5,000,000	-	-	17,001,372	40	38.47
Total LFO Recommended Packages	-	-	-	-	-	-	-	-	-
2021-23 Legislative Actions	4,534,451	-	7,466,921	5,000,000	-	-	17,001,372	40	38.47
Net change from 2019-21 Leg Approved Budget	453,248	-	261,407	(285,859)	-	-	428,796	(1)	(0.57)
Percent change from 2019-21 Leg Approved Budget	11.1%	0.0%	3.6%	(5.4%)	0.0%	0.0%	2.6%	(2.4%)	(1.5%)
Net change from 2021-23 Adj Current Service Level	-	-	-	-	-	-	-	-	-
Percent change from 2021-23 Adj Current Service Level	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

LFO102 - Work Session Presentation Report
2021-23 Biennium

Version: L - 01 - LFO Analyst Recommended
Cross Reference: 54300-001-00-00-00000
Operations

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2019-21 Agy. Leg. Adopted	129,934	-	1,868,762	167,011	-	-	2,165,707	7	6.68
2019-21 Ebds, SS & Admin Act	(43,915)	-	63,396	8,912	-	-	28,393	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2019-21 Leg Approved Budget	86,019	-	1,932,158	175,923	-	-	2,194,100	7	6.68
2019-21 Leg Approved Budget (Base)	129,934	-	1,868,762	167,011	-	-	2,165,707	7	6.68
Summary of Base Adjustments	(590)	-	207,813	6,846	-	-	214,069	1	1.00
2021-23 Base Budget	129,344	-	2,076,575	173,857	-	-	2,379,776	8	7.68
010: Non-PICS Pers Svc/Vacancy Factor	(2,138)	-	(441)	(2,617)	-	-	(5,196)	-	-
030: Inflation & Price List Adjustments	970	-	55,835	205	-	-	57,010	-	-
2021-23 Current Service Level	128,176	-	2,131,969	171,445	-	-	2,431,590	8	7.68
Adjusted 2021-23 Current Service Level	128,176	-	2,131,969	171,445	-	-	2,431,590	8	7.68
Total LFO Recommended Packages	-	-	-	-	-	-	-	-	-
2021-23 Legislative Actions	128,176	-	2,131,969	171,445	-	-	2,431,590	8	7.68
Net change from 2019-21 Leg Approved Budget	42,157	-	199,811	(4,478)	-	-	237,490	1	1.00
Percent change from 2019-21 Leg Approved Budget	49.0%	0.0%	10.3%	(2.6%)	0.0%	0.0%	10.8%	14.3%	15.0%
Net change from 2021-23 Adj Current Service Level	-	-	-	-	-	-	-	-	-
Percent change from 2021-23 Adj Current Service Level	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

LFO102 - Work Session Presentation Report
2021-23 Biennium

Version: L - 01 - LFO Analyst Recommended
Cross Reference: 54300-002-00-00-00000
Library Support and Development Services

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2019-21 Agy. Leg. Adopted	2,377,795	-	148,785	5,054,508	-	-	7,581,088	8	7.50
2019-21 Ebds, SS & Admin Act	18,901	-	-	55,428	-	-	74,329	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2019-21 Leg Approved Budget	2,396,696	-	148,785	5,109,936	-	-	7,655,417	8	7.50
2019-21 Leg Approved Budget (Base)	2,377,795	-	148,785	5,054,508	-	-	7,581,088	8	7.50
Summary of Base Adjustments	73,346	-	-	127,479	-	-	200,825	-	-
2021-23 Base Budget	2,451,141	-	148,785	5,181,987	-	-	7,781,913	8	7.50
010: Non-PICS Pers Svc/Vacancy Factor	(58)	-	-	4,172	-	-	4,114	-	-
030: Inflation & Price List Adjustments	103,851	-	6,430	174,407	-	-	284,688	-	-
050: Fundshifts and Revenue Reductions	(49,197)	-	-	49,197	-	-	-	-	-
2021-23 Current Service Level	2,505,737	-	155,215	5,409,763	-	-	8,070,715	8	7.50
070: Revenue Reductions/Shortfall	-	-	(83,299)	(581,208)	-	-	(664,507)	-	-
Adjusted 2021-23 Current Service Level	2,505,737	-	71,916	4,828,555	-	-	7,406,208	8	7.50
Total LFO Recommended Packages	156,865	-	-	-	-	-	156,865	-	0.50
2021-23 Legislative Actions	2,662,602	-	71,916	4,828,555	-	-	7,563,073	8	8.00
Net change from 2019-21 Leg Approved Budget	265,906	-	(76,869)	(281,381)	-	-	(92,344)	-	0.50
Percent change from 2019-21 Leg Approved Budget	11.1%	0.0%	(51.7%)	(5.5%)	0.0%	0.0%	(1.2%)	0.0%	6.7%
Net change from 2021-23 Adj Current Service Level	156,865	-	-	-	-	-	156,865	-	0.50
Percent change from 2021-23 Adj Current Service Level	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	6.7%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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Package 070 Revenue Shortfalls

Package Description This package reflects Federal Funds expenditure limitation reductions due to lower revenue estimates from the Institute for Museum and Library Services (IMLS) grant program responsible for providing the state with Library Services and Technology Act (LSTA) funds. It also reduces Other Funds expenditure limitation to reflect a reduction in revenue from libraries for database subscriptions.

LFO Recommendation Approve the package.

LFO Recommended	-	-	(83,299)	(581,208)	-	-	(664,507)	-	-
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	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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Package 090 Analyst Adjustments

Package Description This package moves 0.5 FTE of Principal Executive Manager D position (2004002) into the Library Support and Development Services Division from the Talking Book and Braille Division. The full FTE of this position would be within the Library Support and Development Services Division. This package aligns with the permanent financing plan approved in December 2019.

LFO Recommendation Approve the package.

LFO Recommended	156,865	-	-	-	-	-	156,865	-	0.50
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	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2019-21 Agy. Leg. Adopted	1,692,430	-	325,833	-	-	-	2,018,263	8	8.24
2019-21 Ebds, SS & Admin Act	(93,942)	-	8,407	-	-	-	(85,535)	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2019-21 Leg Approved Budget	1,598,488	-	334,240	-	-	-	1,932,728	8	8.24
2019-21 Leg Approved Budget (Base)	1,692,430	-	325,833	-	-	-	2,018,263	8	8.24
Summary of Base Adjustments	117,278	-	24,483	-	-	-	141,761	-	(0.26)
2021-23 Base Budget	1,809,708	-	350,316	-	-	-	2,160,024	8	7.98
010: Non-PICS Pers Svc/Vacancy Factor	5,270	-	(1,555)	-	-	-	3,715	-	-
030: Inflation & Price List Adjustments	54,163	-	8,929	-	-	-	63,092	-	-
050: Fundshifts and Revenue Reductions	31,397	-	(31,397)	-	-	-	-	-	-
2021-23 Current Service Level	1,900,538	-	326,293	-	-	-	2,226,831	8	7.98
Adjusted 2021-23 Current Service Level	1,900,538	-	326,293	-	-	-	2,226,831	8	7.98
Total LFO Recommended Packages	(156,865)	-	-	-	-	-	(156,865)	-	(0.50)
2021-23 Legislative Actions	1,743,673	-	326,293	-	-	-	2,069,966	8	7.48
Net change from 2019-21 Leg Approved Budget	145,185	-	(7,947)	-	-	-	137,238	-	(0.76)
Percent change from 2019-21 Leg Approved Budget	9.1%	0.0%	(2.4%)	0.0%	0.0%	0.0%	7.1%	0.0%	(9.2%)
Net change from 2021-23 Adj Current Service Level	(156,865)	-	-	-	-	-	(156,865)	-	(0.50)
Percent change from 2021-23 Adj Current Service Level	(8.3%)	0.0%	0.0%	0.0%	0.0%	0.0%	(7.0%)	0.0%	(6.3%)

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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Package 090 Analyst Adjustments

Package Description This package moves 0.5 FTE of Principal Executive Manager D position (2004002) into the Library Support and Development Services Division from the Talking Book and Braille Division. The full FTE of this position would be within the Library Support and Development Services Division. This package aligns with the permanent financing plan approved in December 2019.

LFO Recommendation Approve the package.

LFO Recommended	(156,865)	-	-	-	-	-	(156,865)	-	(0.50)
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LFO102 - Work Session Presentation Report
2021-23 Biennium

Version: L - 01 - LFO Analyst Recommended
Cross Reference: 54300-004-00-00-00000
Government Information and Library Services

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
2019-21 Agy. Leg. Adopted	-	-	4,644,049	-	-	-	4,644,049	18	16.62
2019-21 Ebds, SS & Admin Act	-	-	146,282	-	-	-	146,282	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
2019-21 Leg Approved Budget	-	-	4,790,331	-	-	-	4,790,331	18	16.62
2019-21 Leg Approved Budget (Base)	-	-	4,644,049	-	-	-	4,644,049	18	16.62
Summary of Base Adjustments	-	-	150,979	-	-	-	150,979	(2)	(1.31)
2021-23 Base Budget	-	-	4,795,028	-	-	-	4,795,028	16	15.31
010: Non-PICS Pers Svc/Vacancy Factor	-	-	3,682	-	-	-	3,682	-	-
030: Inflation & Price List Adjustments	-	-	138,033	-	-	-	138,033	-	-
2021-23 Current Service Level	-	-	4,936,743	-	-	-	4,936,743	16	15.31
Adjusted 2021-23 Current Service Level	-	-	4,936,743	-	-	-	4,936,743	16	15.31
Total LFO Recommended Packages	-	-	-	-	-	-	-	-	-
2021-23 Legislative Actions	-	-	4,936,743	-	-	-	4,936,743	16	15.31
Net change from 2019-21 Leg Approved Budget	-	-	146,412	-	-	-	146,412	(2)	(1.31)
Percent change from 2019-21 Leg Approved Budget	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	3.1%	(11.1%)	(7.9%)
Net change from 2021-23 Adj Current Service Level	-	-	-	-	-	-	-	-	-
Percent change from 2021-23 Adj Current Service Level	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Legislatively Proposed 2021 - 2023 Key Performance Measures

Published: 4/22/2021 9:51:05 AM

Agency: Library, Oregon State

Mission Statement:

The State Library of Oregon cultivates, preserves, and delivers library and information services to foster lifelong learning and community engagement.

Legislatively Proposed KPMs	Metrics	Agency Request	Last Reported Result	Target 2022	Target 2023
4. COST PER CIRCULATION - Cost per circulation of talking books and Braille books.		Approved	\$2.36	\$2.00	\$2.00
5. USE OF THE OREGON SCHOOL LIBRARY INFORMATION SYSTEM - Average daily visits to the Library-funded Oregon School Library Information System.		Approved	1,735	2,500	2,500
7. CUSTOMER SATISFACTION - 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	92.20%	90%	90%
	Expertise		88.20%	90%	90%
	Helpfulness		90.60%	90%	90%
	Timeliness		91.90%	90%	90%
	Overall		94.10%	90%	90%
	Accuracy		90.60%	90%	90%
1. Patron Service Transactions - Number of reference queries, document delivery and interlibrary loan requests, and outreach/instruction sessions to state agency employees.		Proposed New		8,000	8,000
2. State Agency Employee Use of Electronic Resources - Total yearly use of Government Information and Library Services electronic resources.	Total yearly searches	Proposed New		140,000	140,000
	Total yearly actions			90,000	90,000
	Total yearly downloads			55,000	55,000
3. Talking Book and Braille Library Average Use by User - Total number of circulations per year divided by the number of registered users at the end of the fiscal year.		Proposed New		70	70
8. Value of Talking Book and Braille Library - Percent of Talking Book users that strongly agree or agree that the Talking Book and Braille Library has added value to their life.		Proposed New		90%	90%
9. Ready to Read Participation - Total number of youth 0 – 14 years of age participating in a Ready to Read grant funded activity per year divided by Ready to Read grant funding per year.		Proposed New		0.40	0.40
10. Value of Library Support Programs and Services - Percent of Oregon library staff that strongly agree or agree that the services and programs offered by Library Support help them provide better library service to their community.		Proposed New		90%	90%
1. RESEARCH TRANSACTIONS - Number of research assistance transactions for state employees.		Proposed Delete	7,907	10,000	10,000
2. USE OF GOVERNMENT SERVICES ELECTRONIC RESOURCES - Average [daily] use of Government Information and Library Services electronic resources.		Proposed Delete	1,408	1,115	1,115

Legislatively Proposed KPMs	Metrics	Agency Request	Last Reported Result	Target 2022	Target 2023
3. TALKING BOOK AND BRAILLE SERVICES USERS - Number of individuals registered to receive Talking Book and Braille Services.		Proposed Delete	5,004	5,400	5,400
6. PUBLIC LIBRARIES MEETING APPLICABLE OLA STANDARDS - Percentage of Oregon public libraries meeting essential and enhanced level of applicable Oregon Library Association Standards for a Public Library.		Proposed Delete	57%	62%	62%

LFO Recommendation:

The Legislative Fiscal Office recommends approval of the proposed Key Performance Measures and targets. The proposed KPMs include revisions to KPMs 1, 2, and 3 to more clearly articulate what is being measured. The proposed KPMs also include three new KPMs (7-10) and the deletion of KPM 6. Two of these new KPMs survey customer satisfaction with State Library services (8 and 10) and KPMs 9 measures the annual number of youth participating in a Ready to Read grant funded activity per grant dollar during one year.

SubCommittee Action: