

FISCAL IMPACT STATEMENT PROCESS OVERVIEW

Haylee Morse-Miller, Senior Legislative Analyst



Training Content

- Purpose of a Fiscal Impact Statement (FIS)
- FIS Process
 - Process partners
 - FIS process steps
 - Types of FIS
 - How to determine, quantify, and justify the fiscal impact of a measure
- FIS Tools and Resources
- Program Area Overview
- Q & A

There are two parts to FLS training...

Additional documents can be found on the LFO website- please bookmark this link:

<https://www.oregonlegislature.gov/lfo/Pages/fis.aspx>

Purpose of a Fiscal Impact Statement

- What is a Fiscal Impact Statement?
- Why do we need one?

What is an LFO Fiscal Impact Statement?

- An analysis of the budgetary impact of proposed legislation
 - Expenditures (costs and savings)
 - Revenues (gain or loss)
 - Staffing (Positions/FTE)
- A tool to inform legislators
- A document that is required, by statute and House/Senate rules, for bills reported out of committee
- An early warning to help ensure a balanced budget



Legislative Fiscal Office
82nd Oregon Legislative Assembly
2024 Regular Session

Prepared by: Haylee Morse-Miller
Reviewed by: April McDonald, Matt Stayner, Amanda Beitel
Date: May 24, 2023

Bill Title: Relating to confined animal feeding operations; and declaring an emergency.

Government Unit(s) Affected: Water Resources Department, Department of Environmental Quality, Department of Agriculture, Counties, Cities

Summary of Fiscal Impact

| 2023-25 Biennium | General Fund | Lottery Funds | Other Funds | Federal Funds | Total Funds | Positions | FTE |
|-------------------------------------|-------------------|---------------|-------------|---------------|-------------------|-----------|-------------|
| Department of Agriculture | \$ 562,012 | \$ - | \$ - | \$ - | \$ 562,012 | 2 | 1.76 |
| Department of Environmental Quality | \$ 214,491 | \$ - | \$ - | \$ - | \$ 214,491 | 1 | 0.79 |
| Total Fiscal Impact | \$ 776,503 | \$ - | \$ - | \$ - | \$ 776,503 | 3 | 2.55 |

| 2025-27 Biennium | General Fund | Lottery Funds | Other Funds | Federal Funds | Total Funds | Positions | FTE |
|-------------------------------------|-------------------|---------------|-------------|---------------|-------------------|-----------|-------------|
| Department of Agriculture | \$ 473,750 | \$ - | \$ - | \$ - | \$ 473,750 | 2 | 2.00 |
| Department of Environmental Quality | \$ 67,733 | \$ - | \$ - | \$ - | \$ 67,733 | 1 | 0.25 |
| Total Fiscal Impact | \$ 541,483 | \$ - | \$ - | \$ - | \$ 541,483 | 3 | 2.25 |

Measure Summary

SB 85 - A prohibits the Department of Environmental Quality (DEQ) or the Oregon Department of Agriculture (ODA) from issuing a general National Pollutant Discharge Elimination System (NPDES) or Water Pollution Control Facilities (WPCF) permit to a new large, confined animal feeding operation (CAFO) under certain conditions. Permit applicants must schedule a preliminary consultation with DEQ, ODA, and the Water Resources Department (WRD), and request a land use compatibility statement from the appropriate local government jurisdiction prior to applying.

The measure requires that an applicant for a CAFO permit under an NPDES or WPCF permit must submit a water supply plan for review by WRD, which ensures proper legal authorization and allowable usage. WRD may also recommend conditions for approval of a permit. No animals may be brought to the facility until after ODA inspects any waste management system for compliance with the water quality permit.

The measure permits ODA to issue nutrient application permits and to establish permit requirements by rule. DEQ is directed to report to the interim committees of the Legislative Assembly related to agriculture within 180 days after the U.S. Environmental Protection Agency's National Air Emissions Monitoring Study is finalized, on the findings of the study as related to animal feeding operations.

Fiscal Analysis

The fiscal impact is estimated to be \$776,503 General Fund in the 2023-25 biennium and \$541,483 General Fund in the 2025-27 biennium.

Only impacts on original or engrossed versions are considered official

Page 1 of 2

What is an LFO Fiscal Impact Statement? (continued)

Yes

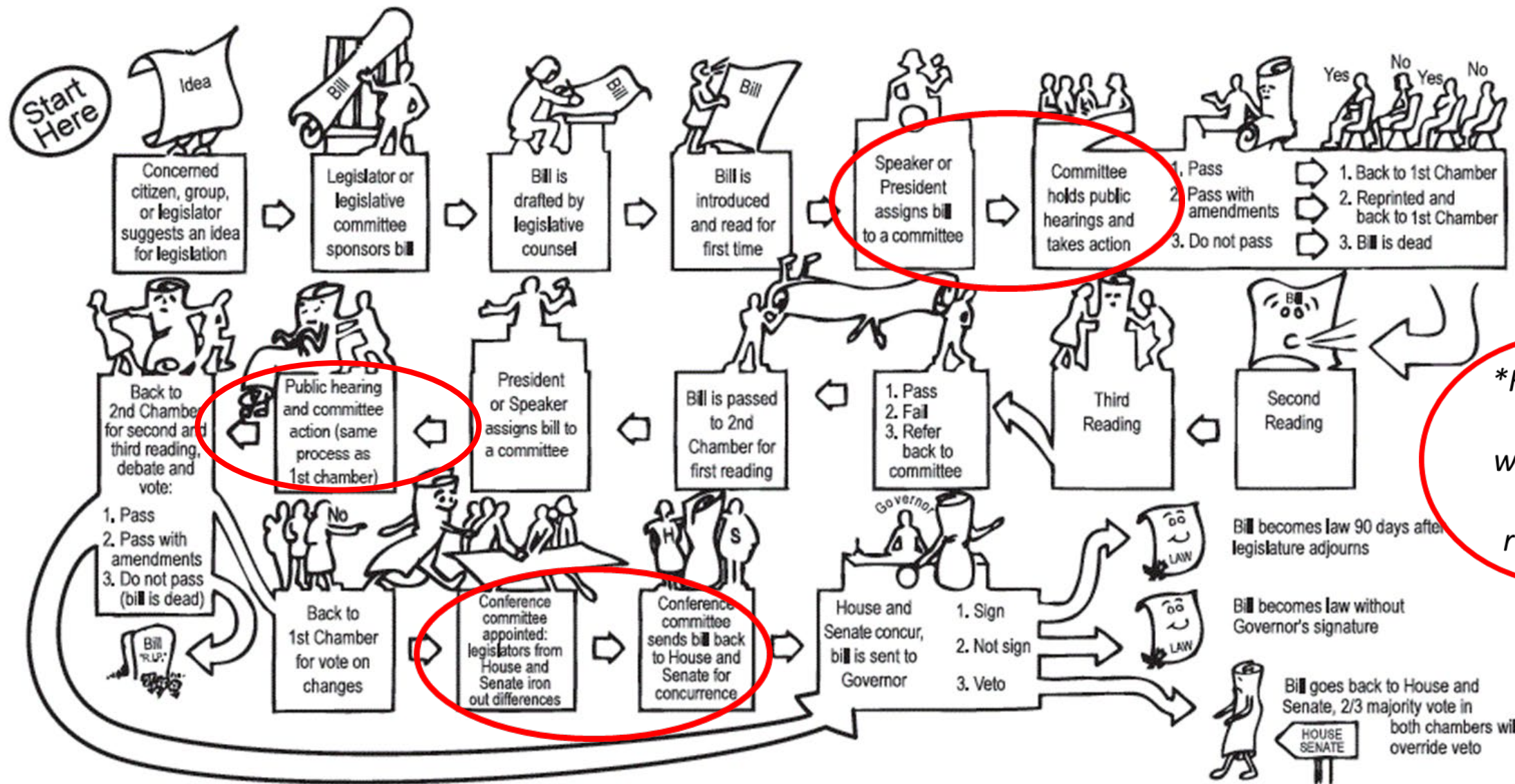
- Independent
- Objective
- Data-driven analysis
- Covers direct financial effects on state and local governments

No

- Does not evaluate legislation
- Does not measure societal impact
- Is not intended to influence passage of a bill

Fiscal Impact Statements and the Legislative Process

- How do fiscal impact statements fit into the overall Legislative process?
- Who is involved in the FIS process?



Legislative Offices and the FIS Process

Legislative Counsel (LC)

- Drafts all measures and amendments
- Renders legal opinions



Legislative Policy and Research Office (LPRO)

- Administer committees
- Request amendments, FIS and Revenue Impact Statements (RIS)

Legislative Revenue Office (LRO)

- Prepare RIS, which include:
 - General Fund impacts
 - Taxes
 - Common School Fund
 - Court Fees and Fines
- FIS includes fees, civil penalties, grants, etc.
- *Remember to include changes to revenue in your FIS documentation*

State Agencies and Local Government

FIS Coordinators

- Communicate effectively and work collaboratively with LFO staff.
- Track measures that will impact your agency.
- Ensure there's good communication between agency fiscal, program and legislative staff.

FIS Preparers

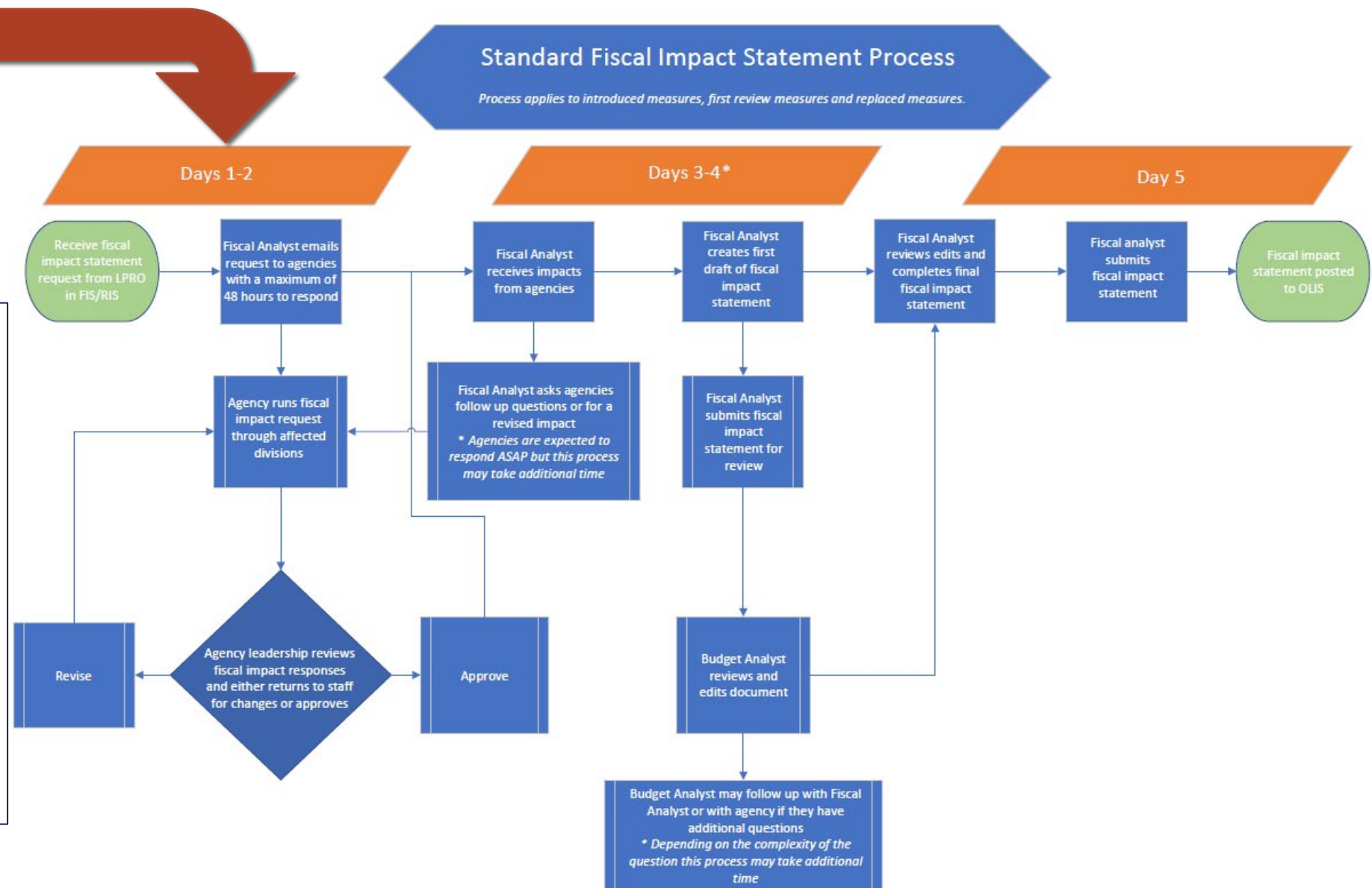
- Develop internal processes to ensure timeliness and accuracy.
- Develop and fully document agency FIS assumptions and conclusions.
- Be proactive.



Fiscal Impact Statement Process Steps

- When is a request for a fiscal impact statement made to an agency?
- What information should be provided to LFO when submitting a fiscal impact statement?

Days are aspirational and may not reflect actual timelines during session



Step 1:

LPRO makes FIS request to LFO

- **PUB** Public Hearing
- **PPW** Public Hearing and Possible Work Session
- **PWK** Possible Work Session
- **PAW** Public Hearing and Work Session
- **PRW** Possible Reconsideration and Work Session
- **WRK** Work Session

Oregon State Legislature
Oregon Legislative Information
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Session Bills Committees Reports

2018 Regular Session

[Senate Committee On Health Care](#)
Meeting Details 2/7/2018 1:00 PM, HR B

Agenda Meeting Materials Recording Log

[Open PDF Agenda](#) Revision 1, Posted on 2/5/2018 at 8:51 AM

Current Agenda Status

2/7/2018 1:00 PM, HR B
This agenda replaces the advisory agenda issued on January 29, 2018

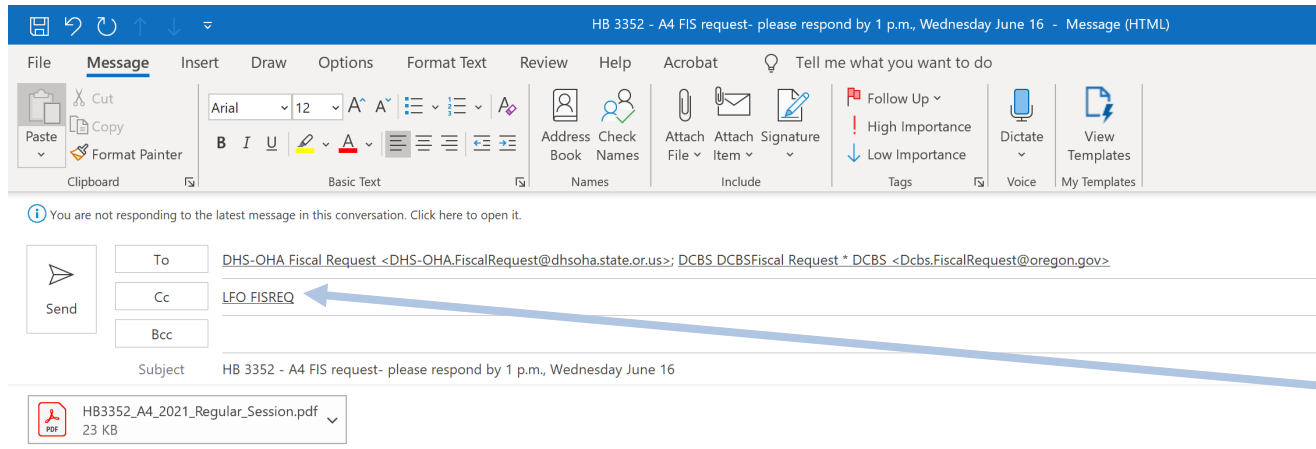
| | |
|--|---|
| Public Hearing and Work Session | |
| SB 1548 | Designates June 27 as Oregon Post-Traumatic Stress Injury Awareness Day. |
| Public Hearing | |
| SB 1549 | Requires continuation of medical assistance for specified period following admission to state hospital. |
| Public Hearing and Work Session | |
| SB 1539 | Establishes Oregon Psychiatric Access Line program in Oregon Health and Science University. |
| Public Hearing | |
| SB 1547 | Expands list of health care professionals who can provide medical release to youth athlete who is suspected of having concussion. |

Meetings

- 2/28/2018 3:00 PM
- 2/26/2018 1:00 PM
- 2/21/2018 1:00 PM
- 2/19/2018 1:00 PM
- 2/14/2018 1:00 PM
- 2/12/2018 1:00 PM
- 2/7/2018 1:00 PM
- SB 1539 - PAW
- SB 1547 - PUB
- SB 1548 - PAW
- SB 1549 - PUB
- 2/5/2018 1:30 PM

Step 2:

LFO emails request to agencies



Please Cc
LFO.FISREQ@oregonlegislature.gov
on your response!

Please reply to this email with your agency's fiscal impact statement for **HB 3352 - A4** as soon as you can, but no later than **1 p.m., Wednesday, 6/16/21**.

Please Cc LFO.FISREQ@oregonlegislature.gov.

Thank you,
Haylee

Haylee Morse-Miller
Legislative Analyst
Legislative Fiscal Office
503.986.1834

Potentially Affected Agencies:

OHA
DHS
DCBS

Go to this link for instructions, forms, and other resources for developing a fiscal impact statement: <https://www.oregonlegislature.gov/lfo/Pages/fis.aspx>

Step 3: Provide all the basic info

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O |
|---|--------------------|---|----------------------------|---|---|---|---|---|---|---|---------------------------------|---|---|---|---|
| 1 | Agency Name: _____ | | | | | | | | | | Measure Number & Version: _____ | | | | |
| 2 | | | | | | | | | | | | | | | |
| 3 | No fiscal impact | | Preparer Name/Title: _____ | | | | | | | | | | | | |
| 4 | Minimal Impact | | Preparer Phone #: _____ | | | | | | | | | | | | |
| 5 | Fiscal Impact | | Date Submitted: _____ | | | | | | | | | | | | |
| 6 | | | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | | | |

Step 4:

Describe the bill

- Read bill and then summarize the portions of the measure that relate to your agency
- Focus on the literal, plain reading of the bill
- Remember:
 - Describe the engrossed version of the bill
 - The intent of the bill and actual bill text may differ

Section 1: Bill Description

Section 1 The Oregon Department of Fish and Wildlife (ODFW) in partnership with Oregon State University (OSU) and the Oregon Veterinary Diagnostic Laboratory shall improve state efforts related to zoonotic diseases. These groups will consult with the Oregon Invasive Species Council (OISC) regarding this effort. This section is repealed 1/2/27.

Section 3 the OISC shall review programs / activities under ORS 570.755 (See 'Other Details' tab for language), including but not limited to the operation and capacity of the council, interagency coordination, outreach and education, develop a statewide invasive species plan and identify /prioritize council actions. These activities would prevent negative impacts from invasive species and establishment of invasive species. Actions will be implemented in accordance with applicable laws related to the OISC. This section is repealed 1/2/27.

Section 5 directs ODFW to establish and maintain a wildlife coexistence program that reduces conflicts between humans and wildlife.

Section 6 & 7 The Oregon Department of Transportation's (ODOT) program duties related to preventing vehicle and wildlife collisions is modified to include feasibility studies, updates to standards / specifications for wildlife highway corridors, production of a list of prioritized projects and additional reporting requirements to the Legislature. Section 8 ODFW contingent on available funding shall provide assistance to partners regarding to support priorities within wildlife connectivity areas. ODFW will seek federal and matching funds related to these projects.

Sections 9 & 10 make general fund appropriations to ODFW and the Higher Education Coordinating Commission for the specified activities.

Section 11 makes a General Fund (GF) appropriations to OISC totaling \$1,470,000 for the biennium ending 06/30/25 as follows: \$220,000 GF for program review as outlined in Section 3 ; \$500,000 for deposit in the Invasive Species Council Account established under ORS 570.800; \$750,000 for deposit in the Invasive Species Control Account established under ORS 570.810. See 'Other Details' tab for related laws establishing these funds.

An Emergency Clause is provided and this act is effective on passage.

Resource: Bill description

Guide to Reading a Legislative Measure

82nd OREGON LEGISLATIVE ASSEMBLY—2023 Regular Session

A-Engrossed
House Bill 2048
Ordered by the House March 23
Including House Amendments dated March 23

Introduced and printed pursuant to House Rule 12.00. Preamble filed (at the request of House Interim Committee on Health Care for Representative Rob Nasse)

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

Directs Health Licensing Office to issue provisional registration to applicant for behavior analysis interventionist registration. **Becomes operative October 1, 2023.**
Requires office to contract with third party to study access to behavior analysis interventionists. Directs office to submit findings to interim committees of Legislative Assembly related to health care not later than September 15, 2024.
Takes effect on 91st day following adjournment sine die.

A BILL FOR AN ACT

1 Relating to behavior analysis interventionists; creating new provisions; amending ORS 676.815; and
2 prescribing an effective date.
3
4 **Be It Enacted by the People of the State of Oregon:**
5 **SECTION 1.** ORS 676.815 is amended to read:
6 676.815. (1) The Health Licensing Office shall establish by rule criteria for the registration of
7 behavior analysis interventionists. The criteria must include, but are not limited to, the requirement
8 that the applicant:
9 [(1)] (a) Have a high school diploma, a modified diploma, a certificate for passing an approved
10 high school equivalency test such as the General Educational Development (GED) test or a degree
11 from a post-secondary institution;
12 [(2)] (b) Be at least 18 years of age;
13 [(3)] (c) Have successfully completed a state and nationwide criminal records check that re-
14 quires fingerprinting;
15 [(4)] (d) Have completed at least 40 hours of professional training in applied behavior analysis
16 approved by the office by rule; and
17 [(5)] (e) Receive ongoing training and supervision by a licensed behavior analyst, by a licensed
18 assistant behavior analyst or by another licensed health care professional.

Legislative session and year

Bill version: If a bill has been amended and the amendment is now incorporated into the text of the measure, it is "engrossed".

Measure number: A member introduces a bill in the chamber in which the member serves. Bills raising revenue must originate in the House.

Sponsor: Member(s) or committee assuming responsibility for introducing a measure.

Summary: Written by Legislative Counsel.

Relating to clause: Measure contents must be germane to the relating to clause. Important for amendments that replace the measure.

Existing law: Current Oregon Revised Statute (ORS) that will be modified. Each section of the relevant ORS will be included, even if not modified.

★ **Adding and deleting language**
Items in **boldfaced font** are being added to existing statute
Items in *italic font in brackets* are being deleted from existing statute

Resource: Introduction to Reading a Legislative Measure

AMENDMENTS AND HAND-ENGROSSING A MEASURE

Hand-engrossing – a process by which amendments are hand-written, or pasted into the appropriate sections of the printed measure.

Generally, "gut and stuff" amendments do not need to be hand-engrossed. They replace the original language of a measure, except for the "Relating To" clause and are complete for the purposes of legislative consideration.

Steps to Hand-Engross a Measure

1. Heading

In the upper right hand corner, write -
(your initials)
date (of engrossing)
Measure Number – Amendment Number (i.e., HB 2221 – 4)

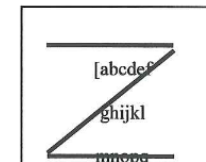
2. Insertions

For simple insertions –
Draw a caret (^) in the body of the measure where the insertion is to begin.
Write the language to be inserted on the printed measure.

For complex insertions –
Cut the original measure and insert the block of printed LC draft text in its proper place. This eliminates errors from retyping. Tape the cut piece of original measure after the amendment and continue.

3. Deletion

Bracket [] the language to be deleted and make a thin line through each line or word. If large sections (more than 4 lines) are to be deleted, draw through the top and bottom line and diagonally through the language to be deleted.



Step 5: Provide program background

Context

- Relevant background on *existing agency programs* that are impacted.
- Include budget links (such as Policy Option Packages) or policy links (such a current/prior bills on this topic) if applicable to your agency.

Section 1: Bill Description

Section 1: Creates the Dog Adoption Unit. This program is to encourage adoption of shelter dogs.

Section 2: Declares an emergency; the bill takes effect on passage.

Section 2: Program Background



This program is the result of recommendations made by the Pet Ownership Task Force, which was created by HB 1000 (2023).

The Dog Adoption Unit will be part of an existing Pet Adoption Program. The Pet Adoption Program was created in 2016 for oversight of pet adoptions. The Pet Adoption Program currently has three staff that focus on compliance with pet adoption requirements. They do not perform outreach related to pet adoptions.

A request for additional staff for the Dog Adoption Unit is also included in the Governor's Budget in Policy Option Package 301.

Step 6: Written analysis

Impact Narrative

- What will be required of your agency if this measure becomes law?
 - What is required to implement this bill?
 - What is already funded, what is not?
 - What cannot be quantified?
- How will the measure affect processes, staffing, and resources?
- **What is most important?**

Section 3: Agency Written Analysis

SB 1561-2 establishes a council and funds to invest and distribute money from the Monsanto Settlement Agreement. Section 5 requires participation from DEQ's Director or their designee. Section 5 also allows OWEB to enter into agreements with other state agencies to provide additional staff support to the council.

- We understand that OWEB will require extensive ongoing support and technical consultation from DEQ's Environmental Cleanup Program in administering sections 1 – 12 of this act. Specifically, characterizing the presence of environmental contaminants in air, land, water; and addressing harms to the environment or public health as a result of contamination. Specifically: Technical support characterizing the environmental outcomes of funds expended under the State Agency Program and Disproportionately Impacted Community Fund [Section 5(10)]

- Technical assistance drafting proposed rules and criteria for funding that are consistent with the terms of the settlement agreement. Specifically, criteria defining the eligibility of environmental characterization and remediation activities [Sections 6 and 7]

- Technical assistance identifying communities disproportionately impacted by PCB and other environmental contaminations, as required in the development of rules and ongoing evaluation of proposals under the disproportionately impacted community fund [Section 7]

- Providing staff support to the Environmental Justice Council to fulfill their consultative obligations. The EJC is within the Office of the Governor, but DEQ provides staff support to the council. [Section 9]

- Providing technical support to the ERC in the development of strategic priorities, specifically developing methodologies and conducting analyses of characterizing environmental contamination [Section 9]

Because existing funding DEQ's Environmental Cleanup Program is restricted to specific cleanup projects (under a cost-recovery funding model) DEQ request funding for staff time we anticipate providing under this proposal. Furthermore, there is not a staff position within the Environmental Cleanup Program that can be assigned this task in lieu of other work, and the cost of this position cannot be absorbed by the current operating budget.

DEQ requests Other Fund position authority equivalent to one Operations and Policy Analyst 3 (OPA3 0.50 FTE \$172,052 OF). DEQ assumes the revenue for this position will come from an intergovernmental agreement with OWEB as authorized under Section 5 of SB 1561-2. The position will phase-in July 1, 2024, first supporting OWEB as they establish a new council and rulemaking, and in subsequent years providing assistance to the council as they establish and reevaluate the strategic priorities required under Section 9.

Step 7: Numbers

- What resources (staff, equipment, regional offices, IT systems, etc.) are required to implement and manage the provisions of the measure?
- What are possible savings and revenue changes?
- Quantify compared to the **2025-27 Current Service Level**

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O |
|----|-------------------------------|-------------------------|----------------------------|--------------------|----------------------|-----------------------|-------------------------|--------------------|------|------|------|------|--|------|------|
| 1 | Impact Type: | | Agency Name: _____ | | | | | | | | | | Measure Number & Version: _____ | | |
| 3 | No fiscal impact | | Preparer Name/Title: _____ | | | | | | | | | | | | |
| 4 | Minimal Impact | | Preparer Phone #: _____ | | | | | | | | | | | | |
| 5 | Fiscal Impact | | Date Submitted: _____ | | | | | | | | | | | | |
| 8 | Effect on Expenditures | | | | | | | | | | | | | | |
| 9 | | <u>General Fund</u> | <u>Lottery Funds</u> | <u>Other Funds</u> | <u>Federal Funds</u> | <u>NL Other Funds</u> | <u>NL Federal Funds</u> | <u>TOTAL FUNDS</u> | | | | | | | |
| 10 | <u>2025-27 Biennium</u> | | | | | | | | | | | | | | |
| 11 | Personal Services | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 12 | Services and Supplies | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 13 | Special Payments | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 14 | Capital Outlay | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 15 | Capital Construction | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 16 | Debt Service | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 17 | Total | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 19 | | <u>General Fund</u> | <u>Lottery Funds</u> | <u>Other Funds</u> | <u>Federal Funds</u> | <u>NL Other Funds</u> | <u>NL Federal Funds</u> | <u>TOTAL FUNDS</u> | | | | | | | |
| 20 | <u>2027-29 Biennium</u> | | | | | | | | | | | | | | |
| 21 | Personal Services | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 22 | Services and Supplies | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 23 | Special Payments | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 24 | Capital Outlay | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 25 | Capital Construction | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 26 | Debt Service | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 27 | Total | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 30 | Effect on Revenues | | | | | | | | | | | | | | |
| 31 | | <u>General Fund</u> | <u>Lottery Funds</u> | <u>Other Funds</u> | <u>Federal Funds</u> | <u>NL Other Funds</u> | <u>NL Federal Funds</u> | <u>TOTAL FUNDS</u> | | | | | | | |
| 33 | <u>2025-27 Biennium</u> | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 35 | <u>2027-29 Biennium</u> | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 38 | Effect on Staffing | 2025-27 Biennium | 2027-29 Biennium | | | | | | | | | | | | |
| 39 | Positions | - | - | | | | | | | | | | | | |
| 40 | FTE | - | - | | | | | | | | | | | | |
| 42 | | | | | | | | | | | | | | | |

[Instructions](#)
[Checklist](#)
[Written Analysis](#)
[Agency Summary](#)
[2025-27 Detailed Calculations](#)
[2027-29 Detailed Calculations](#)
[Other Details](#)
[Crime bills](#)

Step 8: Submit FIS and LFO follow up



Step 9: LFO FIS prepared

FISCAL IMPACT OF PROPOSED LEGISLATION

Measure: SB 85 - A



Legislative Fiscal Office
82nd Oregon Legislative Assembly
2024 Regular Session

Prepared by: Haylee Morse-Miller
Reviewed by: April McDonald, Matt Stayner, Amanda Beitel
Date: May 24, 2023

Bill Title: Relating to confined animal feeding operations; and declaring an emergency.

Government Unit(s) Affected: Water Resources Department, Department of Environmental Quality, Department of Agriculture, Counties, Cities

Summary of Fiscal Impact

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Resource: LFO Fiscal Impact Statement Elements

External FIS Access

- LFO does not share fiscal information submitted by agencies
- Information from agency fiscal impact statements may be included in the official LFO FIS
- LFO-produced FIS are posted on OLIS

Oregon State Legislature
Oregon Legislative Information
Help | Welcome Kim!

Session Bills Committees Reports

2017 Regular Session

HB 2101 Enrolled

Overview Text Analysis Meeting Material/Exhibits Amendments

Staff Measure Summary ▼

Staff Measure Summary for HB2101 A (House) for the House Committee On Rules

Revenue Impact Statement ▼

Revenue Impact Statement for HB2101 A

Revenue Impact Statement for HB2101 B

Fiscal Impact Statement ▼

Fiscal Impact Statement for HB2101 A

Fiscal Impact Statement Types


- What are the different types of FIS?
- How do we describe how passage of a measure affects your agency's staffing, processes and resources?

Types of fiscal impact statements

1. No Fiscal Impact
2. Minimal Fiscal Impact
3. Fiscal Impact
 - Quantified
 - Indeterminate
 - Fiscal Lite (*moves bill from one committee to another*)
4. Re-issued Fiscal Impact Statements
 - Revised Fiscal Impact (*Agency adjustment*)
 - Corrected Fiscal Impact (*LFO adjustment*)


FIS type: No Fiscal Impact

- The measure can be implemented without incurring costs.
- What qualifies for a “No” fiscal impact determination:
 - Potentially impacted agencies are not involved with these statutes.
 - Codifies what is already in practice.
 - Changes in process or protocol do not require additional resources.

| FISCAL IMPACT OF PROPOSED LEGISLATION | | Measure: HB 4093 |
|---|---------------------|------------------|
|  <div>Legislative Fiscal Office 82nd Oregon Legislative Assembly 2024 Regular Session</div> | | |
| Prepared by: | Haylee Morse-Miller | |
| Reviewed by: | Michelle Deister | |
| Date: | February 14, 2024 | |
| Bill Title: Relating to public health requirements of the Oregon Liquor and Cannabis Commission; declaring an emergency. | | |
| Government Unit(s) Affected: Oregon Liquor and Cannabis Commission | | |
| Summary of Fiscal Impact | | |
| The proposed legislation has been determined to have <u>NO FISCAL IMPACT</u> on state or local government expenditures. | | |
| Only impacts on original or engrossed versions are considered official | | |
| Page 1 of 1 | | |

FIS type: Minimal Fiscal Impact (1/2)

- Implementation of the measure can be absorbed within existing resources.
- What qualifies as a “Minimal” fiscal impact determination:
 - Minor changes in process or protocol.
 - Absorbable costs.
 - Impact can be accommodated within the agency’s existing budget without an additional appropriation or expenditure limitation, or new position authority.
- Be aware of cumulative impact

| | | |
|--|---|-----------------------------|
| FISCAL IMPACT OF PROPOSED LEGISLATION | | Measure: SB 1548 - A |
|  | | |
| Legislative Fiscal Office 82nd Oregon Legislative Assembly 2024 Regular Session | | |
| Prepared by: | Haylee Morse-Miller | |
| Reviewed by: | John Terpening, Kim To, Amanda Beitel, Michelle Deister, Paul Siebert | |
| Date: | February 28, 2024 | |
| Bill Title: Relating to standards of time. | | |
| Government Unit(s) Affected: Employment Department, Department of Administrative Services, Oregon Youth Authority, Department of Corrections, Statewide, Tourism Commission, Counties, Cities | | |
| Summary of Fiscal Impact | | |
| The proposed legislation has been determined to have <u>MINIMAL FISCAL IMPACT</u> on state or local government expenditures. | | |
| While this individual measure has a minimal fiscal impact, an agency may incur a greater than minimal net fiscal impact, depending on the cumulative impact of all measures enacted into law that affect the agency. | | |
| <i>Only impacts on original or engrossed versions are considered official</i> | | |
| Page 1 of 1 | | |

FIS type: Minimal Fiscal Impact (2/2)

- LFO may issue a written explanatory minimal fiscal impact statement, instead of a minimal impact template, if a FIS requires additional information or context.
- Generally, this describes a specific need for data, or risk or uncertainty surrounding the bill.

FISCAL IMPACT OF PROPOSED LEGISLATION

Measure: HB 4079



Legislative Fiscal Office
82nd Oregon Legislative Assembly
2024 Regular Session

Prepared by: Michael Graham
Reviewed by: Julie Neburka
Date: February 7, 2024

Bill Title: Relating to State School Fund distributions; prescribing an effective date.

Government Unit(s) Affected: Department of Education, School Districts

Summary of Fiscal Impact

- *The measure is anticipated to have a minimal fiscal impact on the Department of Education and school districts.*
- *The measure will have a redistributive effect on distributions to school districts from the State School Fund.*

Measure Description

HB 4079 modifies the calculation of weighted average daily membership for school districts for distributing state funds to school districts under the State School Fund (SSF) formula. The measure removes the 11% cap on special education weight for the average daily membership (ADM) of a school district based on the number of students with a disability, and it provides for additional weighting of ADM based on the number of students who are homeless.

Fiscal Analysis

The measure is anticipated to have a minimal fiscal impact on the Department of Education (ODE) and school districts.

Department of Education

The measure is anticipated to have a minimal fiscal impact on ODE. The measure would not require any additional program staff in ODE School Finance, as the changes to the SSF formula would be incorporated into existing processes for calculating and distributing SSF payments. The measure would require staff development time to make information technology changes to the SSF system to account for the changes in the Individual Education Program (IEP) weight and the addition of the homeless weight.

School Districts

The measure is anticipated to have a minimal fiscal impact on school districts. The change to the IEP weight and the addition of the homeless weight will have a redistributive effect on SSF distributions to school districts. The impact on SSF distributions to individual districts is unclear, as it will depend on the number of IEP students and homeless students within each district. The measure is not anticipated to increase the workload of school districts.

Relevant Dates

The measure takes effect on July 1, 2024.


Only impacts on original or engrossed versions are considered official

Page 1 of 1

FIS type: Fiscal Impact (1/2)

- **Implementation of the measure requires additional resources:**
 - Significant changes in process or protocol
 - Non-absorbable costs
- Must include a comprehensive narrative explaining the fiscal impact.
- Must include worksheet with detailed cost calculations.
- Not a commitment to provide funding.

FIS type:
Fiscal Impact
(2/2)

 Legislative Fiscal Office
82nd Oregon Legislative Assembly
2024 Regular Session

Prepared by: Haylee Morse-Miller
Reviewed by: Amanda Beitel, Paul Siebert
Date: February 15, 2024

Bill Title: Relating to elections.

Government Unit(s) Affected: Secretary of State, Association of County Clerks

Summary of Fiscal Impact

| 2023-25 Biennium | General Fund | Lottery Funds | Other Funds | Federal Funds | Total Funds | Positions | FTE |
|---------------------|--------------|---------------|-------------|---------------|-------------|-----------|-----|
| Secretary of State | \$ 61,522 | \$ - | \$ - | \$ - | \$ 61,522 | - | - |
| Total Fiscal Impact | \$ 61,522 | \$ - | \$ - | \$ - | \$ 61,522 | - | - |

| 2025-27 Biennium | General Fund | Lottery Funds | Other Funds | Federal Funds | Total Funds | Positions | FTE |
|---------------------|--------------|---------------|-------------|---------------|-------------|-----------|-----|
| Secretary of State | \$ 271,828 | \$ - | \$ - | \$ - | \$ 271,828 | - | - |
| Total Fiscal Impact | \$ 271,828 | \$ - | \$ - | \$ - | \$ 271,828 | - | - |

Measure Description

This measure requires the Secretary of State (SOS) to create and make publicly available a list of the 10 most commonly spoken languages in each county, other than English, based on the best available data and including the estimated number of individuals in each county who speak each listed language. Previously, only five languages were required. The Secretary of State and counties must also include statements in the information section of the voters’ pamphlet in English and 10 additional common languages for the county, instead of five.

Additionally, the state and county voters’ pamphlets must be translated into each of these languages if the Secretary of State estimates that the language is spoken by 300 or more individuals in any one county. If no language other than English is spoken by 300 or more individuals in a county, the Secretary of State is to translate the state and county voters’ pamphlets into the most commonly spoken language in that county, other than English. Previously, these provisions applied if there were only 100 individuals who spoke a language other than English.

Fiscal Analysis

The estimated fiscal impact of this measure is \$61,522 General Fund in the 2023-25 biennium, and \$271,828 General Fund in the 2025-27 biennium.

Secretary of State

SOS costs are anticipated to be \$61,522 General Fund in the 2023-25 biennium, and \$271,828 General Fund in the 2025-27 biennium. These costs include:

- Translation costs of \$43,128 in the 2023-25 biennium and \$129,577 in the 2025-27 biennium.
- Advertising the online availability of translated materials at a cost of \$75,000 in the 2025-27 biennium.

Only impacts on original or engrossed versions are considered official
2

Page 1 of

- Hiring temporary staff during peak times during voters’ pamphlet production, including administrative and information technology staff, at an estimated cost of \$15,334 in the 2023-25 biennium, and \$58,201 in the 2025-27 biennium.
- Additional minimal amounts for stipends for Translation Advisory Council members who are able to speak the five additional most commonly spoken languages that will be included in voters’ pamphlets.

In addition to the costs above, SOS currently has a limited duration position authorized through the end of the 2023-25 biennium that provides support to the Translation Advisory Council. Because this position is already funded, the estimated cost to continue this position into the 2025-27 biennium is not included here. However, there could be additional costs to continue the work required under this measure in the 2025-27 biennium if the position is not reauthorized.

Other entities

There is no fiscal impact for counties or Association of County Clerks, as the state pays for voters’ pamphlet costs.

Relevant Dates

The measure takes effect on January 1, 2025.

The requirements of the measure apply to state and county voters’ pamphlets distributed from January 31, 2025 onward.



Legislative Fiscal Office
82nd Oregon Legislative Assembly
2024 Regular Session

Prepared by: MaryMichelle Sosne
Reviewed by: Gregory Jolivet, Matt Stayner
Date: 2/16/2024

Bill Title: Relating to adult foster homes; prescribing an effective date.

Government Unit(s) Affected: Department of Human Services, Long Term Care Ombudsman, Oregon Health Authority

Summary of Fiscal Impact

Costs related to the measure for the Department of Human Services and the Oregon Health Authority are indeterminate at this time - see explanatory analysis.

Measure Description

SB 1591 allows adult foster homes to increase the number of older adults they serve from five to seven if the adult foster home meets the following qualifications:

- The adult foster home received an initial license to operate for at least 24 months.
- The adult foster home has been licensed to provide care to five residents for at least 12 months.
- The provider confirms the increase in residents will not have an adverse effect on the existing residents.
- The home is compliant with emergency evacuation guidelines.
- The home has a residential sprinkler system in place and is compliant with all required fire and safety regulations.
- The provider has paid all required fees.

The Department of Human Services is directed to adopt rules to ensure the safety of residents in an adult foster home with more than five residents. The measure provides that the definition of "residential care facility" does not include adult foster homes with more than five residents.

Fiscal Analysis

The fiscal impact of the measure is indeterminate for the Department of Human Services (DHS) and the Oregon Health Authority (OHA), which is largely due to the potential impact on caseload being unknown. According to DHS's projections, the adult foster home caseload could increase by between 49 and 591 cases per month. However, the net cost impact related to assumptions on caseload is difficult to predict because of the potential for individuals to enter an adult foster home with increased capacity from an existing Aging and People with Disabilities program, which would have offsetting savings. The expanded capacity could also result in the ability to place individuals who are currently in higher and costlier levels of care in adult foster homes. In addition, the extent to which the changes in the measure would encourage providers to modify their current homes or potentially build new ones to accommodate additional residents is unknown and may not materially change in the near term given the time it takes for such modifications or construction projects to occur. Notably, some homes currently have capacity to serve fewer than five adults and the increased capacity allowed under this measure may not provide an incentive for such homes to expand.

FIS type: Indeterminate Impact

- "Indeterminate" impacts are determined by LFO. Please do not mark FIS submissions as "Indeterminate."
- Submit a narrative that discusses known costs as well as what elements of a bill cannot be quantified and why.

FISCAL IMPACT OF PROPOSED LEGISLATION

Measure: SB 1591

Apart from program service costs, identifying the impact of adult foster home capacity is critical to understanding the potential impact on DHS and OHA operations in terms of the number of positions required to adequately support facility licensing, consultations, and inspections. DHS and OHA will likely need additional staff if the measure incentivizes enough providers to expand their capacity notwithstanding the net impact on caseload.

While overall costs are indeterminate, some estimates have been provided for potential position costs. To develop training, support complex case consultations and process corrective action work, DHS has indicated that as many as seven full-time positions (\$503,532 General Fund and \$503,269 Federal Funds) could be needed. OHA also anticipates that one full-time permanent position (\$65,724 General Fund and \$65,493 Federal Funds) could be needed to verify that adult foster homes meet the safety requirements. These potential positions should be considered high-level estimates until the actual caseload and program capacity impact is known.

In addition to caseload, the eXPRS payment system would require updates to permit a higher capacity provider. DHS would also need to complete a wage study to determine rates for providers with higher capacity homes. DHS notes the measure may require the department and SEIU to renegotiate the collective bargaining agreement.

Relevant Dates

The measure takes effect on the 91st day after sine die.

FIS type: Fiscal Lite

- Moves bill between committees

FISCAL IMPACT OF PROPOSED LEGISLATION

Measure: HB 4140 - 2



Legislative Fiscal Office
82nd Oregon Legislative Assembly
2024 Regular Session

Prepared by: Emily Coates
Reviewed by: John Borden, Paul Siebert
Date: February 12, 2024

Bill Title: Relating to victims; declaring an emergency.

Government Unit(s) Affected: Department of Justice, Office of the Governor

Summary of Fiscal Impact

This fiscal impact statement is for the purpose of transmitting the measure from the House Committee on Judiciary to the Joint Committee Ways and Means.

The measure directs the Department of Justice (DOJ) and the Office of the Governor to include in the agency's request budget and Governor's request budget amounts necessary to fund the operation of Children's Advocacy Centers, the Survivor Housing Funds grant program, or any successor program that provides funds to assist victims of domestic violence and sexual assault with housing needs, and the Oregon Domestic and Sexual Violence Services Fund. The measure authorizes DOJ, when calculating the amounts, to include 10% for administrative costs. These provisions apply to biennia beginning on or after July 1, 2025.

A more complete fiscal analysis on the measure will be prepared as the measure is considered in the Joint Committee Ways and Means.

Further Analysis Required

How to Determine, Quantify, and Justify the Fiscal Impact of a Measure

- What items should you look for in a bill?
- How do you communicate a measure's impact on your agency?

Elements of a quality FIS

A compelling FIS:

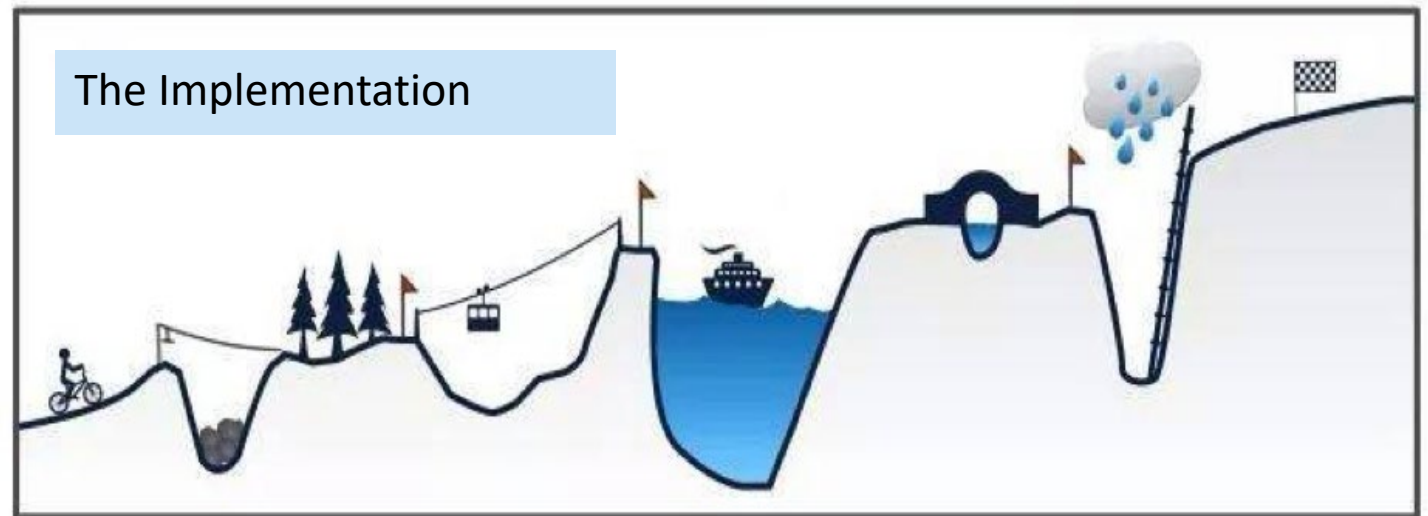
- Is a business plan, not a price tag.
- Justifies the costs or savings estimate.
- Clearly and credibly documents facts.
- Leverages existing resources.
- Guides subsequent work.
- Remains within the scope of the bill.



Elements of a quality FIS (part 2)

Do

- Remember audience
- Be thorough
- Provide data-driven analysis
 - Cite your sources
- Follow the established process
- Consider risks, urgency, and uncertainty



Common questions to consider in your FIS

- Are new positions needed?
 - Why are they needed?
 - Are they permanent or limited duration?
 - What are the position-related services and supplies costs?
 - All positions should be priced **at Step 3**
 - Consider time to hire- unlikely that the new position hiring process will start for a few months
- What other services and supplies costs (beyond those related to hiring a new position) are anticipated? Are these items and amounts supported by your narrative?
- Fund type
 - What are the sources for Other Funds or Federal Funds?
- Are costs one-time or ongoing?
- What are the timelines for this work?

Consider bill timelines - effective date

Effective dates quick guide

Impact for 2025-2027

Normally 18 months of impact *(if there is no Emergency Clause or other designated date for the bill to take effect)*

Emergency clause is up to 24 months of impact

Impact for 2027-2029

24 months unless there is a sunset date before June 30, 2029.

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2026

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Days provided in this calendar are subject to change.

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2027

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Date printed: 30-09-2019 at 12:59

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Consider bill timeline - operative dates

- How do operative dates impact the timing of your plan, and any fiscal impacts?

TRANSITIONAL PROVISIONS

SECTION 62. The Director of the Employment Department shall establish the family and medical leave insurance program under section 33 of this 2019 Act such that eligible employees as defined in section 2 of this 2019 Act and employers may begin making contributions to the program no later than January 1, 2022.

SECTION 62a. Notwithstanding the operative date specified in section 63 (1)(a) of this 2019 Act, an employer may apply to the Director of the Employment Department, in accordance with the application process established by the director under section 33 of this 2019 Act, for approval of an employer-offered benefit plan described under section 43 of this 2019 Act on or after the effective date of this 2019 Act.

SECTION 63. Operative dates. (1)(a) Sections 8, 11, 14, 16 to 31, 37, 41, 43 to 48, 49a and 61 of this 2019 Act become operative on January 1, 2022.

(b) Sections 3 to 7, 9, 10, 12, 13, 15, 42 and 50 of this 2019 Act become operative on January 1, 2023.

(c) The amendments to ORS 410.619 by sections 52 and 53 of this 2019 Act become operative on January 1, 2022.

(d) The amendments to ORS 657.100, 657.471 and 659A.162 by sections 54, 55 and 56 of this 2019 Act become operative on January 1, 2023.

(e) The amendments to ORS 659A.885 by sections 57 and 58 of this 2019 Act become operative January 1, 2025.

(2) The Employment Department and the Department of Revenue may take any action before the operative dates specified in subsection (1) of this section that is necessary to enable the departments to exercise, on and after the operative dates specified in subsection (1) of this section, the duties, functions and powers conferred on the departments by sections 1 to 51 of this 2019 Act.

EFFECTIVE DATE

SECTION 65. This 2019 Act takes effect on the 91st day after the date on which the 2019 regular session of the Eightieth Legislative Assembly adjourns sine die.

Consider timing for funding

FISCAL IMPACT OF PROPOSED LEGISLATION

81st Oregon Legislative Assembly – 2022 Regular Session
Legislative Fiscal Office

Measure: SB 1576

*Only Impacts on Original or Engrossed
Versions are Considered Official*

Prepared by: Haylee Morse-Miller
Reviewed by: John Terpening, John Borden
Date: February 2, 2022

Measure Description:

Establishes product stewardship program for mattresses.

Government Unit(s) Affected:

Department of Environmental Quality (DEQ), Department of Justice (DOJ)

Summary of Fiscal Impact:

Costs related to the measure may require budgetary action - See analysis.

Summary of Expenditure Impact

| | |
|--------------------|--|
| Other Funds | |
| Total Funds | |
| Positions | |
| FTE | |

Analysis:

SB 1576 establishes a program of mattress stewardship organization, which is advised by a mattress stewardship organization. The program DEQ will:

- Approve a stewardship organization
- Approve a fee that the stewardship organization will charge
- Establish an annual report to the legislature
- Review and approve the annual report
- Investigate program activities
- Adopt rules to administer the program

This measure also establishes the program in the fund continuing resolution for the year beginning January 1, 2023, and initial program for the year beginning January 1, 2023. Programs must be implemented by the first day after the legislative assembly adjourns sine die.

For this program, DEQ anticipates needing a permanent, part-time Operations and Policy Analyst 2 position (0.25 FTE in 2021-23, 0.50 FTE in 2023-25) to oversee program activities. The total cost of this position and associated Services and Supplies is \$56,604 Other Funds in 2021-23 and \$113,209 Other Funds in 2023-25.

While the program is intended to be self-supporting based on an annual fee paid by stewardship organizations, this fee will not be charged until after a stewardship organization plan is approved in 2023, and DEQ does not anticipate collecting mattress stewardship fees until sometime around January 2025. It is assumed existing Solid Waste Tipping Fee funds would be used to cover program costs for the remainder of the 2021-23 biennium and most of the 2023-25 biennium. These funds would be reimbursed once the stewardship organization begins making payments. Absent the availability of Solid Waste Tipping Fee funds, the costs would need to be covered by the General Fund.

There is no fiscal impact on the Department of Justice.

This measure warrants referral to the Joint Committee on Ways and Means for further consideration of any budgetary impacts.

Consider funding language - bills with appropriations

- “There is appropriated...”
- **Question:** If a measure appropriates \$100,000 to carry out the provisions of the bill, but the expected cost is \$300,000, how should we price the FIS?
- **Answer:** Always provide the true cost of carrying out the provisions of the measure.

80th OREGON LEGISLATIVE ASSEMBLY-2019 Regular Session

Senate Bill 1028

Sponsored by Senator BAERTSCHIGER JR, Representative STARK

SUMMARY

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

Appropriates moneys to Department of State Police for 2019-2021 biennium for purpose of allowing State Fire Marshal to issue grants to rural fire districts that are newly formed within Josephine County.
Declares emergency, effective July 1, 2019.

A BILL FOR AN ACT

1 Relating to state finance; and declaring an emergency.

2 Be It Enacted by the People of the State of Oregon:

3 **SECTION 1.** In addition to and not in lieu of any other appropriation, there is appropri-
4 ated to the Department of State Police, for the biennium beginning July 1, 2019, out of the
5 General Fund, the amount of \$_____, for use by the State Fire Marshal in making block
6 grants to rural fire districts within Josephine County that are newly formed during the
7 biennium, if any, for any purposes the State Fire Marshal deems consistent with fire district
8 functions under ORS chapter 476 or 478.

9 **SECTION 2.** This 2019 Act being necessary for the immediate preservation of the public
10 peace, health and safety, an emergency is declared to exist, and this 2019 Act takes effect
11 July 1, 2019.
12
13

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

LC 4338

80th OREGON LEGISLATIVE ASSEMBLY-2019 Regular Session

House Bill 2856

Sponsored by COMMITTEE ON ENERGY AND ENVIRONMENT (at the request of Representative Ken Helm)

SUMMARY

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

Appropriates moneys from General Fund to Water Resources Department to study ground water in this state. Directs department to provide 10-year plan to Legislative Assembly that prioritizes ground water studies. Directs department to report to Legislative Assembly detailing use of appropriated funds.
Declares emergency, effective on passage.

A BILL FOR AN ACT

1 Relating to ground water studies; and declaring an emergency.

2 Whereas the state integrated water resources strategy recognizes that Oregon has a need for
3 additional ground water investigations to further understand the relationship between ground water
4 and surface water and the availability of both; and

5 Whereas the state integrated water resources strategy provides that conducting ground water
6 investigations is a priority of this state; now, therefore,

7 Be It Enacted by the People of the State of Oregon:

8 **SECTION 1.** In addition to and not in lieu of any other appropriation, there is appropri-
9 ated to the Water Resources Department, for the biennium beginning July 1, 2019, out of the
10 General Fund, the amount of \$9,000,000 for ground water studies and investigations or the
11 gathering and analysis of other ground water data that is needed to assess and manage
12 Oregon's ground water resources in the priority basins as determined by the department.

13 **SECTION 2.** Not later than September 15, 2020, and September 15, 2021, the Water Re-
14 sources Department shall submit to the Legislative Assembly, in the manner provided in
15 ORS 192.245, a report detailing how the moneys appropriated under section 1 of this 2019 Act
16 have been spent.

17 **SECTION 3.** Not later than January 1, 2020, the Water Resources Department shall sub-
18 mit to the Legislative Assembly a 10-year plan that prioritizes ground water studies
19 throughout this state and details any additional legislative investment necessary to imple-
20 ment the studies.

21 **SECTION 4.** This 2019 Act being necessary for the immediate preservation of the public
22 peace, health and safety, an emergency is declared to exist, and this 2019 Act takes effect
23 on its passage.
24
25

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

LC 3140

Consider funding language – establishing funds

- Bills can establish funds for which revenue sources have yet to be identified:
 - “...creates the [xxxx] Fund separate and distinct from the General Fund... Authorizes [agency] to accept gifts, grants or contributions into these funds...”
- Please detail the actual costs of carrying out provisions of the bill.

SECTION 2. (1) Section 1 of this 2017 Act and the amendments to ORS 377.841 by section 5 of this 2017 Act become operative on the date the last agency adopts rules described in subsections (2) and (3) of this section.

(2) When the Department of Transportation determines that it has received a sufficient legislative appropriation or other funding to cover the costs of carrying out the provisions of section 1 of this 2017 Act and the amendments to ORS 377.841 by section 5 of this 2017 Act, the department shall adopt rules so indicating.

(3) When the State Parks and Recreation Department determines that it has received a sufficient legislative appropriation or other funding to cover the costs of carrying out the provisions of section 1 of this 2017 Act, the department shall adopt rules so indicating.

(4) The agencies described in this section shall notify the Legislative Counsel upon adoption of rules under this section.

SECTION 3. (1) The Department of Transportation Human Trafficking Awareness Fund is established in the State Treasury, separate and distinct from the General Fund. Interest earned by the Department of Transportation Human Trafficking Awareness Fund shall be credited to the fund. Moneys in the fund are continuously appropriated to the Department of Transportation to pay for the expenses incurred in carrying out the provisions of section 1 of this 2017 Act. The fund consists of moneys appropriated or transferred to the fund and moneys received under subsection (2) of this section.

(2) The department may receive gifts, grants or contributions from any source, whether public or private, to carry out the provisions of section 1 of this 2017 Act. Moneys received under this subsection shall be deposited in the Department of Transportation Human Trafficking Awareness Fund.

SECTION 4. (1) The State Parks and Recreation Department Human Trafficking Awareness Fund is established in the State Treasury, separate and distinct from the General Fund. Interest earned by the State Parks and Recreation Department Human Trafficking Awareness Fund shall be credited to the fund. Moneys in the fund are continuously appropriated to the State Parks and Recreation Department to pay for the expenses incurred in carrying out the provisions of section 1 of this 2017 Act. The fund consists of moneys appropriated or transferred to the fund and moneys received under subsection (2) of this section.

(2) The department may receive gifts, grants or contributions from any source, whether public or private, to carry out the provisions of section 1 of this 2017 Act. Moneys received under this subsection shall be deposited in the State Parks and Recreation Department Human Trafficking Awareness Fund.

(2) Subject to subsection (4) of this section, in carrying out the provisions of subsection (1) of this section, the council may enter into contracts necessary to accomplish the purposes of subsection (1) of this section.

(3) The Department of Transportation shall:

(a) Maintain ownership of any roadside rest area located along an interstate highway that the council manages, maintains, improves and develops pursuant to subsection (1) of this section; and

(b) Enter into an intergovernmental agreement with the council under which the council has the authority to manage, maintain, improve and develop those rest areas owned by the department that are listed in subsection (1) of this section.

(4) Under the intergovernmental agreement entered into under subsection (3) of this section, the council shall conduct public contracting activities in accordance with the provisions of ORS 377.836.

(5) For the purpose of funding the management, maintenance, improvement and development of roadside rest areas under this section, the department shall allocate to the council, no later than January 2 of each year, \$6.55 million from the State Highway Fund.

(6) For the purpose of funding the activities described in section 1 of this 2017 Act, the department shall allocate to the council, no later than January 2 of each year, an amount necessary to carry out the provisions of section 1 of this 2017 Act from the Department of Transportation Human Trafficking Awareness Fund established under section 3 of this 2017 Act.

[(6)] (7) The council may not use any moneys originating from a local transient lodging tax or a state transient lodging tax, as those terms are defined in ORS 320.300, for the purpose of funding the management, maintenance, improvement and development of roadside rest areas under this section.

Consider permissive language used

- Bills can use permissive language such as *may*, or obligatory language such as *shall*.
- For the purposes of pricing the fiscal, **provide LFO with the cost of carrying out the work *permitted* by the bill.**

79th OREGON LEGISLATIVE ASSEMBLY—2017 Regular Session

House Bill 2400

Sponsored by Representatives NATHANSON, MCKEOWN; Representatives BARNHART, NOSSE, POWER (Pression filed.)

SUMMARY

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

Authorizes any state agency or department to enter into agreements with any political subdivision for collection, enforcement, administration and distribution of local transient lodging taxes.

Takes effect on 91st day following adjournment sine die.

FISCAL IMPACT OF PROPOSED LEGISLATION

79th Oregon Legislative Assembly – 2017 Regular Session
Legislative Fiscal Office

Measure: HB 2400

Only Impacts on Original or Engrossed Versions are Considered Official

Prepared by: Theresa McHugh
Reviewed by: John Borden, Paul Siebert
Date: March 28, 2017

Measure Description:

Authorizes any state agency or department to enter into agreements with any political subdivision for collection, enforcement, administration and distribution of local transient lodging taxes of such political subdivision.

Government Unit(s) Affected:

Cities, Counties, Department of Administrative Services (DAS), Department of Revenue(DOR), Statewide

Summary of Expenditure Impact:

Potential costs associated with the measure are indeterminate (see analysis below).

Analysis:

HB 2400 amends ORS 305.620 to add local transient lodging taxes to the list of taxes imposed by a local government for which a state agency may enter into an agreement with the local government to collect, enforce, administer, and distribute. **The measure does not require a state agency to enter into such an agreement; however, if there was an agreement under the measure it is assumed that the state agency would charge the local government for any costs and would potentially require an increase in their Other Funds expenditure limitation.** For example, the Department of Revenue (DOR) estimates, based on other agreements DOR has under this statute, that an increase in Other Funds expenditure limitation of up to \$381,967 and one position (0.50 FTE) could be needed in 2017-19. This amount would include one-time administrative and technology costs that would not continue into 2019-21, when the costs would decrease to approximately \$87,500, primarily for the continuation of the position.

Since it is unknown how many, if any, new agreements would occur as a result of the measure, the cost is indeterminate.

A BILL FOR AN ACT

1 Relating to the administration of local transient lodging taxes; amending ORS 305.620; ;
2 scribing an effective date.
3
4 **Be It Enacted by the People of the State of Oregon:**
5 **SECTION 1.** ORS 305.620, as amended by section 32, chapter 24, Oregon Laws 2016, is
6 to read:
7 305.620. (1) Any state agency or department **may enter** into agreements with any polit
8 division of this state for the collection, enforcement, administration and distribution of loc
9 of the political subdivision imposed upon or measured by gross or net income, wages or net
10 from self-employment, local general sales and use taxes, **local transient lodging taxes** ;
11 imposed under ORS 475B.345.
12 (2) The department or agency shall prescribe the rules by which the agreements ente
13 under subsection (1) of this section are administered.

Remember to show your work!

- Provide support for how you arrived at a fiscal determination
- If you do not provide information to support your numbers, especially S&S costs, we cannot include this information in the FIS
- Do not include inflation or merit increases

| | | | | | | | | | | | | | | | | | | | | | | | |
|----|---|------------------------------------|------|--------------------------|-------------------|------|------------------------------------|--------|-----|-------------------------|----|-----|------|-----------|-------|--------------|-------------------------|-----|----|----|-----|---|---|
| 1 | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W |
| 2 | Fill in columns A, B, D, E and G; the table will calculate personal services costs for you. | | | | | | | | | | | | | | | | | 0.4 | 0 | 0 | 0.6 | | |
| 3 | Position count | Months per biennium | FTE | Job classification title | Type: PF/PP LF/LP | Step | Monthly Salary (See Comp Plan tab) | Salary | ERB | PERS (see OPE Rate Tab) | SS | WBF | Ins. | Total OPE | PFMLI | Mass Transit | Total Personal Services | GF | LF | OF | FF | | |
| 4 | | | 0.00 | | | 3 | | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| 5 | | | 0.00 | | | 3 | | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| 6 | | | 0.00 | | | 3 | | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| 7 | | | 0.00 | | | 3 | | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| 8 | | | 0.00 | | | 3 | | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| 9 | | | 0.00 | | | 3 | | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| 10 | | | 0.00 | | | 3 | | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| 11 | | | 0.00 | | | 3 | | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| 12 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| 13 | | | | | | | | | | | | | | | | | | - | - | - | - | | |
| 14 | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | Standard Services & Supplies Costs for New Positions | | | | | | | | | | | | | | | | | | | | | | |
| 16 | Add additional line items if needed | | | | | | | | | | | | | | | | | | | | | | |
| 17 | ORBITS Line Item | | | | GF | LF | OF | FF | TF | | | | | | | | | | | | | | |
| 18 | 4150 | Employee Training | | | | | | \$ | - | | | | | | | | | | | | | | |
| 19 | 4175 | Office Expenses | | | | | | \$ | - | | | | | | | | | | | | | | |
| 20 | 4200 | Telecommunications | | | | | | \$ | - | | | | | | | | | | | | | | |
| 21 | 4250 | Data Processing | | | | | | \$ | - | | | | | | | | | | | | | | |
| 22 | 4375 | Employee Recruitment & Development | | | | | | \$ | - | | | | | | | | | | | | | | |
| 23 | 4400 | Dues & Subscriptions | | | | | | \$ | - | | | | | | | | | | | | | | |
| 24 | 4650 | Other Services & Supplies | | | | | | \$ | - | | | | | | | | | | | | | | |
| 25 | 4700 | Expendable Property 250-5000 | | | | | | \$ | - | | | | | | | | | | | | | | |
| 26 | 4715 | IT Expendable Property | | | | | | \$ | - | | | | | | | | | | | | | | |
| 27 | | | | | | | | \$ | - | | | | | | | | | | | | | | |
| 28 | | | | | | | | \$ | - | | | | | | | | | | | | | | |
| 29 | | | | | | | | \$ | - | | | | | | | | | | | | | | |
| 30 | | | | | 0 | 0 | 0 | 0 | 0 | | | | | | | | | | | | | | |
| 31 | | | | | | | | | | | | | | | | | | | | | | | |
| 32 | Other Non-Standard Services & Supplies Costs | | | | | | | | | | | | | | | | | | | | | | |
| 33 | Non-position related costs- add additional line items if needed | | | | | | | | | | | | | | | | | | | | | | |
| 34 | ORBITS Line Item | | | | GF | LF | OF | FF | TF | | | | | | | | | | | | | | |
| 35 | 4100 | Instate Travel | | | | | | \$ | - | | | | | | | | | | | | | | |
| 36 | 4125 | Out of State Travel | | | | | | \$ | - | | | | | | | | | | | | | | |
| 37 | 4275 | Publicity & Publications | | | | | | \$ | - | | | | | | | | | | | | | | |
| 38 | 4300 | Professional Services | | | | | | \$ | - | | | | | | | | | | | | | | |
| 39 | 4315 | IT Professional Services | | | | | | \$ | - | | | | | | | | | | | | | | |
| 40 | 4325 | Attorney General | | | | | | \$ | - | | | | | | | | | | | | | | |
| 41 | 4425 | Facilities Rental and Taxes | | | | | | \$ | - | | | | | | | | | | | | | | |
| 42 | 4575 | Agency Program Related S&S | | | | | | \$ | - | | | | | | | | | | | | | | |
| 43 | | | | | | | | \$ | - | | | | | | | | | | | | | | |
| 44 | | | | | | | | \$ | - | | | | | | | | | | | | | | |
| 45 | | | | | | | | \$ | - | | | | | | | | | | | | | | |
| 46 | | | | | | | | \$ | - | | | | | | | | | | | | | | |
| 47 | | | | | 0 | 0 | 0 | 0 | 0 | | | | | | | | | | | | | | |

Referral of a measure to Joint Ways and Means

- Bill adds new positions, or add months to positions (increase FTE), or funding for position/FTE.
- Bill requires appropriation of General Fund.
- Bill requires allocation of Lottery Funds.
- Bill contains new bonding authorizations.
- Bill causes a significant increase in agency expenditures from an Other Funds or Federal Funds revenue source.
- Bill establishes a legislative task force.
- Bill includes primary funding mechanism which uses ambiguous funding language (e.g. “subject to available funds”).
- Bill changes budgetary process, with regard to either monitoring expenditures or development of budget.

Legislative Leadership Decides Subsequent Referrals

FIS Tools and Resources

- The home stretch...

How to prepare

- Prepare staff for after hours and weekend work schedules.
- Be proactive.
 - Start or finalize FIS on agency introduced bills.
 - If you have information that the measure will be scheduled, prepare FIS on measures even before LFO request.

Before the FIS: Talk to your fiscal analyst

| Fiscal Analyst | Assigned FIS Program Areas | Fiscal Analyst | Assigned FIS Program Areas |
|---|---|------------------|---|
| Haylee Morse-Miller / Kim To and John Terpening | Fiscal Impact Supervisor(s) | Chelsey Herrmann | Public Safety Judicial Branch |
| Twais Broadus | Natural Resources Local Governments | Michael Graham | Economic Development Education |
| MaryMichelle Sosne | Human Services Consumer and Business Services | Roxanne Adams | Legislative Branch Administration and Elected Officials Transportation |

| JANUARY | | | | | | |
|---------|-----------------------------|----------------------|---------------------|-------------------------|---------------------------------|----|
| S | M | T | W | T | F | S |
| | | | 1 New Year's Day | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 New Member Academy | 10 New Member Academy | 11 |
| 12 | 13 Org Days; Swearing In | 14 Trainings | 15 Trainings | 16 Trainings | 17 LC Draft Request Deadline | 18 |
| 19 | 20 MLK Day | 21 Session Begins | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

| FEBRUARY | | | | | | |
|----------|-----------------------|------------------------------|------------------------|----|-------------------------|----|
| S | M | T | W | T | F | S |
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 President's Day | 18 | 19 | 20 | 21 LC returns drafts | 22 |
| 23 | 24 | 25 Measure Intro Deadline | 26 Revenue Forecast | 27 | 28 | |

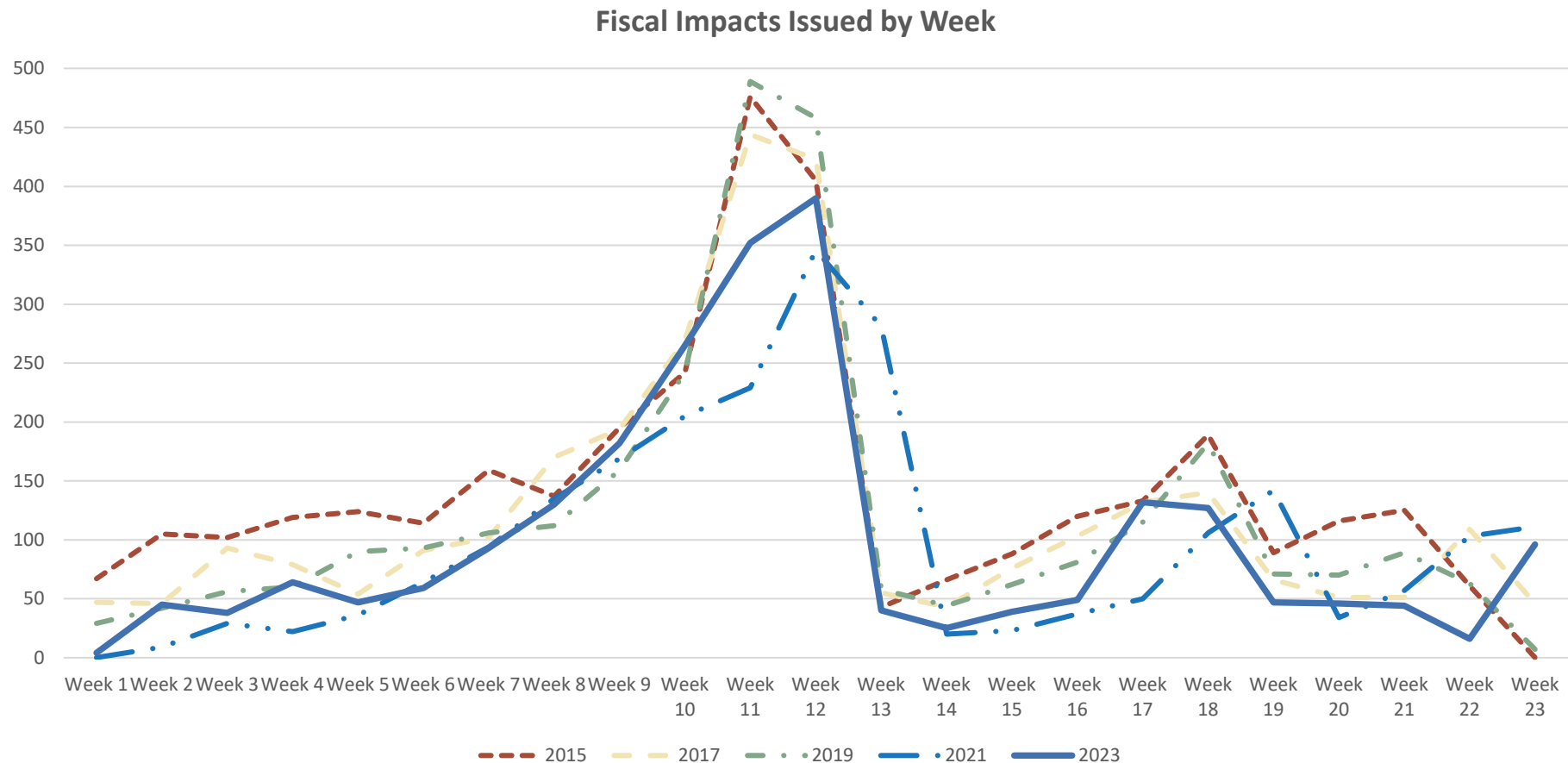
| MARCH | | | | | | |
|-------|-------------------------|----|----|----|-------------------------|----|
| S | M | T | W | T | F | S |
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 Begin Daily Floor | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 Post Work Session | 22 |
| 23/30 | 24/31 | 25 | 26 | 27 | 28 | 29 |

| APRIL | | | | | | |
|-------|----|----|-----------------------------|----|----|----|
| S | M | T | W | T | F | S |
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 First chamber deadline | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | | | |


| MAY | | | | | | |
|-----|--------------------|----|------------------------|----|-------------------------------|----|
| S | M | T | W | T | F | S |
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 Post Work Session | 10 |
| 11 | 12 | 13 | 14 Revenue Forecast | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 Second Chamber Deadline | 24 |
| 25 | 26 Memorial Day | 27 | 28 | 29 | 30 | 31 |

| JUNE | | | | | | |
|-------------------------------|----|----|-----------------------|------------------|----|----|
| S | M | T | W | T | F | S |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 Target Sine Die | 19 Juneteenth | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 Constitutional Sine Die | 30 | | | | | |

Managing FIS Workload - Long Session



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Seismic Upgrades to Continue at Oregon State Capitol This Summer
As part of ongoing efforts to make seismic and accessibility improvements at the Oregon State Capitol, a portion of the building will close starting Friday, July 1 to allow for new construction. [Learn more.](#)


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**Today's Events at the Capitol**


Scheduled Events For 8/22/2022 


☒ Floor Sessions ☒ Committees ☒ Building Activities

| Time: | Event: | Location: |
|---------|---|-----------|
| 8:00 AM | Historic Portion of Capitol Closed for Construction | Rotunda |
| 9:00 AM | Joint Task Force On Corrections Medical Care | Remote C |

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LFO FIS website

- Agency FIS Form – Excel
- Agency FIS Form - Word
- FIS Frequently Asked Questions
- Introduction to Reviewing a Legislative Measure
- LFO Fiscal Impact Statement Elements
- FIS Training Slides
- FIS Training Recording (*coming soon*)
- FIS Example Packets (*coming soon*)

Information and resources can be found at:

<https://www.oregonlegislature.gov/lfo/Pages/fis.aspx>

Questions?

Legislative Fiscal Office

900 Court Street NE, Room H-178, Salem, Oregon 97301

Oregon State Capitol | (503) 986-1828 | www.oregonlegislature.gov/lfo

