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Agency of Administration
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Andrew A. Pallito, Commissioner

MEMORANDUM

TO: Agency and Department Heads and Business Managers
FROM: Andrew Pallito, Commissioner, Department of Finance and Management
DATE: January 14, 2016
RE: Legislative Testimony



Thank you for your hard work over the past few months on the FY 2016 Budget Adjustment and the FY 2017 Governor's Recommended Budget. Collectively, we have produced good documents to start work with the Legislature.

As the Session begins, we want to bring to your attention the following guidance relative to your department's legislative budget testimony. It is of the utmost importance that you be responsive to the Legislature while continuing to support the budget the Administration has proposed. Although none are expected, if any deviations occur, they should be immediately reported to the Secretary of Administration and the Department of Finance & Management so that we can ascertain the impact on the Agency/Department level as well as at the statewide level.

Please provide an ELECTRONIC copy of your budget testimony to your budget analyst, preferably at least one week prior to your budget hearing. (The JFO instructions request receipt 5 days prior to your hearing; to the extent possible, it is important for your analyst to receive the testimony beforehand so that they can assist you by giving it a quick review.) Note that the committees request electronic copies ONLY; the committee staff has committed to making the necessary paper copies. The same "paperless" rules apply to any requested responses to committee questions.

The following are required materials for your budget presentation:

Required Off-line Materials - Not From Vantage:

- Department Introduction/Presentation: Brief summary of key FY 2016 issues and highlights.
- Budget Development Form (aka Ups/Downs): Identifying significant budget changes versus FY 2016.
- Budget by Program: See discussion below and attached Chairs' letter.
 - Performance Budget Material: Departments participating in the Programmatic Performance Measure Budget program, may include the excel template used to submit the required detail to the CPO. For AHS, the same information may be provided using Scorecard. Other presentation material related to performance may also be included as



you see fit. The CPO will be consolidating all performance information in one report, but this may not be in time for early testimony.

Required Vantage Reports (PDF versions of following reports):

- Budget Rollup Report
- Budget Detail Report
- Personnel Summary Report (make sure to use the version without employee names!)
- Federal Receipts Report
- Interdepartmental Receipts
- "Grants Out" Report

In addition to the above, please keep the following considerations in mind:

- Please communicate any reactions or developments by the appropriations committees to your analyst, who will similarly communicate back with you.
- A representative from Finance and Management will plan to be present at all presentations to the budget committees. If an analyst is not present at your testimony, please report back to the analyst on how the testimony went, and on the general reaction of the committee to budget and policy issues.
- The materials above are intended to meet all the requests specified in the letter from the Chairs of the House and Senate Appropriation Committees. As necessary, include any necessary supplemental information to address their request:
 - For example, the Agency of Human Services is asked to provide longitudinal data about the populations enrolled and services provided. This includes, but is not limited to recent caseload trends and characteristics such as age, income and employment, acuity of need, types of services provided such as case management, type of workforce participation and/or other data for factors that relate to program cost and outcome.
- Please note in this year's letter the emphasis on the results-based program budgets and performance measures. Departments should be prepared to respond with documentation and testimony. You may choose to utilize materials and information developed through the Strategic Planning process. Note the committees' specific questions:
 1. How much are we doing?
 2. How well are we doing it?
 3. Is anyone better off?
- It is recommended that Secretaries and Commissioners provide testimony on all budget matters. For Executive Branch departments that report to the Governor, **it is your responsibility to ensure that all staff representing your agency or department offer testimony consistent with the Governor's recommended budget.**

- Please make note of who is your “point person” on each of the appropriations committees, and make yourself available to them prior to your hearing, and afterwards for any follow-up. If the Committee requests any additional materials or information, respond **electronically** within one week and make sure to share the materials with the budget analyst before the information is sent out.
- JFO intends to post all your budget testimony packages on the JFO website. You should also post your budget material on your department’s website or provide a link to the JFO website.
- Please keep your analyst informed of any bills you are testifying on that include budget dollars, or that may create programs that have future fiscal impacts.