

Agency Training for RBA Forums

Presented by:

Office of Fiscal Analysis/The Charter Oak Group, LLC

November 29 and December 3, 2010

Purpose of Forum

- Forum is meant to be a dialogue between Appropriators and the agency about:
 - The contribution of the program to the result
 - The effectiveness of the program
- Report card is the point of departure; agency is not expected to read the report card or walk the committee through it
- Forum will be limited to the selected program
- The proposed questions are likely to be asked in some form, but legislators may well ask other relevant questions

Overview of Appropriations Committee RBA Process

- Sixth year of the RBA initiative
- All agencies were asked to do one new report card for a selected program in 2011
- Agencies that submitted report cards in 2010 were asked to update the report card for their selected program only
- December forums are for the new 2011 report cards; forums mark the end of the pilot phase of the RBA initiative
- 2011 budget hearings will use RBA as a framework for all programs; this marks the full implementation of RBA in the budget process

Are Report Cards and Forum a Showcase for the Selected Program or Are They Connected to the New Biennial Budget?

- Yes
- Submitting a good report card will not earn you extra credit in the budget process; it will facilitate a useful dialogue in the forum
- Report card and the forum are inputs (but only two of many inputs) into the formal budget process and your budget hearing in February
- Regardless of what the report card may reveal about how well the program is operating and whether anyone is better off, given the fiscal situation for the next biennium, even highly effective programs may be cut



Forum Procedures

- ❑ Each program's forum has been scheduled for 30 minutes
- ❑ Forum will be convened by the co-chairs of the Appropriations Committee
- ❑ Committee members will have received the report card, transmittal sheet, and proposed questions
- ❑ Agencies may not submit any additional materials at the forum
- ❑ Agencies may not make an opening statement
- ❑ Agencies may be asked to respond to follow-up questions in writing after the forum

Do's

- ❑ Always be thinking about how to tell the best, honest story about your program
- ❑ Be totally clear and knowledgeable about the population result, how your program contributes, and the difference between the three types of measures: How Much, How Well, and Better Off
- ❑ Answer the questions directly and simply. If you do not have the data, say so and explain if you intend to develop the data and how you will do so

Do's

- Use the RBA thinking process whenever you can to illustrate your point or respond to a question:
 - This is what the data show, and it is or is not ok
 - Here are the story behind the data, the diagnosis, and the causes and forces at work
 - And these are the actions we will take to respond to those causes and forces and here's why they will make a difference



Do's

- If you do not have sufficient performance measures, be prepared to talk about:
 - How you manage the program in the absence of those measures
 - What plans you have to develop better measures
 - What information the Committee should use in making budget decisions about your program

Don'ts

- ❑ Do not make a formal presentation, introduce new written material, or use PowerPoint
- ❑ If you do not have sufficient measures, do not try to hide the fact or be defensive. State that you do not have the measures, explain what data you do use to manage the program, and present your plan to obtain better data by next year
- ❑ Don't present too much detail. Answer the questions fully but as succinctly as you can. Don't monopolize precious forum time

Don'ts

- ❑ Don't limit your turn the curve actions to what you are already doing or to things that will cost a lot of money. Focus on new actions to improve performance, especially those that are no-cost or low-cost
- ❑ Be prepared to discuss how you can do the least harm if your program takes a deep cut
- ❑ Be serious about reallocating existing resources from other program if you think this program's budget must be preserved



Questions?