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*'25B – Memo 9*

TO: Agency Directors

FROM: Ryan Osmundson, Budget Director

DATE: May 3, 2022

SUBJECT: Executive Program and Service Inventories

As the Executive Planning Process (EPP) for the 2025 Biennium gets underway, it is prudent that we utilize data analytics to make informed budgeting decisions while acknowledging the evolving needs our internal (state employees and agencies) and external customers (citizens, businesses, contractors, federal government). To that end, the Office of Budget and Program Planning (OBPP) is conducting an inventory of services and programs.

In preparation for the 2021 Biennium, OBPP required agencies to complete a Program Inventory which provided varying levels of detail about the services and programs provided by state government. During this interim, OBPP, along with input from the Governor's Office and agency staff, reviewed the Program Inventory, weighing the usefulness of the product against the work conducted to complete it. The results of the review lead to development a more useful and comprehensive Executive Program and Service Inventory (EPSI). The purpose of the EPSI is to develop a database of distinct stand-alone products, services, functions, and facilities offered by agencies. The inventory will include the beneficiaries and size of agency programs, as well as the authorization, purpose, funding, and length of existence of agency services and programs.

During the data collection phase, agencies will be asked to create entries in the OBPP Programs/Services portal. Each entry will include some detail about the program or service, including actual expenditures for the 2021 Biennium, and budget/appropriation detail for the 2023 Biennium. In subsequent years, agencies will be tasked with updating budgeted to actual expenditures, as well as adding new entries to the inventory as needed.

In the coming weeks, OBPP will be releasing an online survey tool that will allow agencies to share this information about the programs they operate and the services they provide. Along with the tool itself, there will be specific instructions and definitions to help describe what the tool is intended to capture as well as scheduled trainings. As reflected in Budget Memo 1 – Budget Timeline, submission of survey results will be required no later than June 16, 2022. In the months following that deadline, my staff and I look forward to working with agency staff to further refine responses where needed and to understanding more thoroughly the work that agencies do on behalf of the people of Montana.