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***'27B – Memo 4***

TO: Agency Directors

FROM: Ryan Osmundson, Budget Director

DATE: March 6, 2024

SUBJECT: Executive Program and Service Inventories

As the Executive Planning Process (EPP) for the 2027 Biennium gets underway, the Office of Budget and Program Planning (OBPP) is conducting the 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 update existing entries or create new entries in the OBPP Programs/Services portal. Each entry will include some detail about the program or service, including actual expenditures for the 2023 Biennium, and budget/appropriation detail for the 2025 Biennium. Upon completion of the 2024 EPSI, agencies will have entries with up to six years of data (four years of actuals and two years of budgeted).

OBPP will provide a link to the 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, OBPP will provide specific instructions and definitions and a recorded video to demonstrate the navigation of the tool. In addition, budget officed staff will hold live question and answer sessions to further assist agencies in the data collection process and to address specific issues agencies may encounter. As reflected in Budget Memo 1 – Budget Timeline, submission of survey results will be required no later than April 30, 2024. 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 help agency leadership and citizens more thoroughly understand the work that agencies do on behalf of the people of Montana.