

**Transparency Oregon
Advisory Commission**

Biennial Report



**Legislative Fiscal Office
May 2017**

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SUMMARY

This report fulfills the Transparency Oregon Advisory Commission's (TOAC) requirement to provide the Legislative Assembly with a report on the status of the Oregon transparency website by February 15 of each odd-numbered year. This requirement is codified in ORS 184.486.

The report covers enhancements made to the Oregon transparency website during the 2015-17 biennium and identifies possible future enhancements to the website for the next biennium. This is the fourth report made by the Commission.

The Transparency Oregon Advisory Commission was established by HB 2500 (2009) and held its first meeting on December 17, 2009. The Commission met three times during the 2009-11 biennium, once during the 2011-13 biennium, twice in the 2013-15 biennium, and twice in the 2015-17 biennium.

The Commission consists of nine members appointed by the Governor, the President of the Senate, the Speaker of the House, the Director of the Department of Administrative Services, and the Legislative Fiscal Officer. Membership is required to reflect a mixture of legislators, public members, and state agency representatives.

The Department of Administrative Services (DAS) was directed by HB 2500 to develop an Oregon transparency website by January 1, 2010. The website was to be designed so that any person could view the information on the site that is a public record and not exempt from disclosure under the state's public records laws. The Department complied with this direction by providing an initial website release in December 2009. The Department, through its Office of the State Chief Information Officer (CIO), has worked with TOAC to make various changes and enhancements to the site since that time. In 2015, HB 3099 transferred responsibility for the transparency website from DAS to the State CIO.

The website provides annual updates for agency budget, revenue, expenditure, contracts and procurement, state workforce compensation information, performance audits, and benchmarks. Four bills were passed by the 76th Legislative Assembly in 2011 that added requirements to the website. These new requirements included providing additional reports from agencies that provide tax expenditures for economic development (HB 2825), public meeting notices (HB 2788), data on county lottery payments (HB 3188), and including Education Service Districts among the reporting entities (SB 250).

In the 2012 session, the 76th Legislative Assembly added reporting requirements for applications related to energy tax credits and grants for biomass, energy conservation projects, transportation, manufacturing, and renewable energy contributions (HB 4079).

In 2013, the 77th Legislative Assembly added requirements to the website that directed: state agencies to provide information regarding the percentage of expenditures made in-state and out-of-state for goods or services (HB 3400); the posting of links to public meetings minutes and additional data on local governments (HB 2370); the posting of a report from Oregon Business Development

Department on tax credit costs and fees (HB 2763); and changed the date of the Legislative report from January 15 to February 15 of each odd-numbered year (HB 2322).

Additionally, HB 3035 (2013) directed DAS to develop a plan for providing information related to contracts entered into by state agencies, school districts, and community colleges and report on the plan by January 1, 2015.

In 2015, the 78th Legislative Assembly added requirements to the website that included: information on tax exemptions for qualified machinery and equipment to process grains, bakery and dairy products from the Department of Agriculture (HB 3125), and created a method for users to offer suggestions regarding the form or content of the website, required information to be posted describing the process for public records requests, required notices of local government public meetings if requested by the local government, and adding economic development section to the website for posting of information submitted by state agencies responsible for administering specific economic development programs (SB 515).

And finally, HB 3099 (2015) transferred the duties, functions and powers related to the transparency website from the Department of Administrative Services to the State Chief Information Officer.

In 2016, the 78th Legislative Assembly required that the Department of Revenue submit a report for the transparency website on any exemptions to property taxes granted by a city or county for eligible construction in a rural area (SB 1565).

AUTHORITY

HB 2500 was passed unanimously by the 2009 Legislature to create the Oregon transparency website and establish the Transparency Oregon Advisory Commission.

The measure was introduced due to interest in having Oregon join the growing number of states that have operational websites for posting state spending, detailing financial information, identifying performance measures and data, and providing interactive systems to model state budgets.

A copy of the Oregon Revised Statutes relating to the Transparency Oregon Advisory Commission and Oregon transparency website can be found in Appendix A of this report.

BACKGROUND

The Transparency Oregon Advisory Commission was established by HB 2500 (2009) and held its first meeting on December 17, 2009. The Commission met three times during the period between December 2009 and January 2011 and three times during the period between January 2012 and May 2014.

As part of the enacted legislation, the Department of Administrative Services was directed to develop an Oregon transparency website that would provide state budget, revenue, and other financial data

and information to the public. State agencies were directed in the measure to provide the information required by DAS only when no additional cost would be incurred and with no reallocation of resources. This basically meant that only existing reports and information contained within existing databases would be used in the creation and update of the website. The measure also specified certain data elements and reports to be included on the website.

DAS initiated work on the website in July 2009 by holding meetings with state agency stakeholders; creating a collaborative workspace for HB 2500 implementation on Oregon GovSpace; holding one-on-one meetings with each primary stakeholder; conducting awareness presentations for agency heads, administrative business services directors, public information officers, and others; and distributing newsletter articles and Exec Net messages. The initial transparency website mockup was prepared in September 2009.

The Commission reviewed this initial website mockup in December 2009 and made several suggestions for changes and improvements to the content on the website. During the period between January and March 2010, DAS released the initial website and made additional modifications. DAS also established reporting standards with respect to format, content, and timelines and made agreements with agencies for report submission. DAS then continued to work on identifying and implementing improved data entry and classification methods for expenditure information, and developed procedures for the annual update of information.

During the 2011 legislative session, four bills were passed that included new requirements for the transparency website:

- 1) HB 2825 added Tax Expenditure reports from the Department of Revenue, Business Oregon, Department of Energy, and the Office of Film and Television.
- 2) HB 2788 required each state agency to post notices of public meetings on the website beginning January 1, 2012.
- 3) HB 3188 required that each county submit a report on lottery funds expenditures, including the amount of moneys received and expended, purpose and use of the moneys, and amounts spent on administration of these funds.
- 4) SB 250 added Education Service Districts to the list of reporting entities to the website.

In the 2012 legislative session, reporting requirements on applications for energy tax credits and grants related to biomass, energy conservation projects, transportation, manufacturing, and renewable energy contributions were added to the website requirements (HB 4079).

During the 2013 legislative session, four bills were passed that included new requirements for the transparency website:

- 1) HB 2370 added links to state agency websites that have public meeting minutes or summaries; links to Secretary of State website for agency administrative rules; and links to local government websites providing information on revenues, expenditures and budgets.
- 2) HB 2763 required Business Oregon to post report on costs and fees for administering tax credit.
- 3) HB 3035 directed DAS to develop a plan for providing specific information to the website on public contracts from state agencies, school districts and community colleges.

- 4) HB 3400 directed state agencies to include description of the percentage of expenditures made inside and outside of Oregon for contract goods or services.

During the 2015 legislative session, three bills were passed that included new requirements for the transparency website:

- 1) SB 515 created a method for user feedback, required information posted regarding public records requests, allowed for notices of local government public meetings, and added economic development section to the website for information submitted by state agencies responsible for specific economic development programs.
- 2) HB 3099 transferred the duties, functions and powers related to the transparency website from the Department of Administrative Services to the State Chief Information Officer.
- 3) HB 3125 added information on tax exemptions for qualified machinery and equipment to process grains, bakery and dairy products from the department of Agriculture.

In the 2016 legislative session, SB 1565 required that the Department of Revenue submit a report for the transparency website on any exemptions to property taxes granted by a city or county for eligible construction in a rural area.

For each annual report DAS and the Office of the State CIO, works with Executive Branch agencies, Legislative Branch agencies, the Judicial Department, Oregon's Public Universities, Oregon Lottery, Oregon State Treasury, Education Service Districts, and all 36 Oregon counties and provides reports on the website viewable through Excel spreadsheets, plain text, links to existing information system applications, or through the data.oregon.gov open data portal, which is an open data repository providing users the ability to access, search and download additional public information.

MEMBERSHIP

The Commission consists of nine members appointed by the Governor, the President of the Senate, the Speaker of the House, the Director of the Department of Administrative Services, and the Legislative Fiscal Officer. Membership is required to reflect a mixture of legislators, public members, and state agency representatives. Four of the members are required to be legislators, one each from the majority and minority parties in the Senate and the House, appointed by the President and Speaker, respectively. Two members are required to be from the public with experience in public finance, public relations, measurement of performance outcomes, or technology; one each appointed by the President and the Speaker. The Governor is required to appoint one member from an executive branch agency, and the DAS Director and Legislative Fiscal Officer are required to appoint one member each.

The term of office of each member is four years, but a member serves at the pleasure of the appointing authority. Before the term of any member expires, the appointing authority is required to appoint a successor whose term begins on the next January 1st. Members can be reappointed. If there is a vacancy, the appointing authority is required to make an appointment that is immediately effective for the remainder of the unexpired term.

A list of the current membership of the Commission by appointing authority with the length of term identified can be found in Appendix B of this report.

WEBSITE REQUIRED CONTENT

ORS 184.483 directs the State Chief Information Officer to develop and make available to the public a website that provides state agency and education service district information and other financial and budget data. The specified information includes:

- Annual state agency revenues
- Annual state agency expenditures
- Annual state agency human resources expenses, including compensation
- Annual state agency tax expenditures
- A description of percentages of expenditures made in-state and out-of-state for contracts for goods or services for the state agency
- State agency contracting and subcontracting information
- A graphic representation of the primary funding categories and approximate number of individuals served by the state agency
- A description of the mission, function, and program categories of the state agency
- A copy of any audit report issued by the Secretary of State for the state agency
- Local service plans of the Education Service Districts
- A copy of all reports required by statute for Education Service Districts
- Notices of public meetings of state agencies and Education Service Districts
- A link to the Secretary of State website for rules adopted by the state agency
- An economic development section for information regarding specific economic development programs
- Information on local government tax exemptions for properties in enterprise zones
- Information about the process for requesting copies of public records from a public body

The statute also requires that the required content for each state agency, to the extent practicable and subject to laws relating to confidentiality, should consist of existing data using existing state agency resources without the reallocation of resources and without any additional cost to the agency. State agencies are directed to provide the information in the format and manner required by the State CIO by posting reports and providing links to existing information system applications and/or websites. The reporting requirements apply to all state agencies, boards and commissions in the Executive, Legislative, and Judicial branches of government as well as the State Treasurer.

In order to provide the required information within confidentiality laws, DAS followed the guidelines of the Oregon ID Theft Act (definition of Personally Identifiable Information) and Public Records Law ORS 192. To provide the information at no additional cost, DAS developed and the office of the State CIO updates the website by posting reports or by using links to currently existing reports, websites, systems, and databases. The primary reports currently used by the State CIO include the following:

- Revenue Reports – DAS Chief Financial Office; Oregon State Lottery

- Expenditure Reports – DAS State Financial Management System; Oregon State Lottery; Oregon Department of Transportation; Oregon’s Public Universities
- Contracts Reports – DAS Enterprise Goods and Services; Oregon State Lottery; Oregon Department of Transportation; Oregon University System; Oregon Judicial Department
- Human Resource Expenses/Salary Reports – DAS Chief Human Resources Office; Oregon University System
- Other Reports/Information – Annual Tax Expenditure Reports; Energy Tax Credits and Renewable Energy Grants Reports; Secretary of State Audits Reports; Agency Mission, Function, Program Categories from Oregon Blue Book; Stimulus Tracking and Reporting; Education Spending from Open Books Project; Education Service District Reports; County Lottery Expenditure Reports; Economic and Revenue Forecasts; Public Meeting Notices; website links to miscellaneous other sources such as the Legislative Fiscal Office and DAS Chief Financial Office publications on the state budget

DAS was directed by HB 2500 to develop and make available the transparency website by January 1, 2010. The website was to be designed so that any person could view the information on the site that is a public record and not exempt from disclosure under the state’s public records laws. The Department complied with this direction by providing an initial website release in December 2009. DAS and the State CIO has worked with TOAC to make various changes and enhancements to the site since that time.

The State CIO updates the Oregon Transparency website annually although not all pages on the website required updating since the state is in the middle of the 2015-17 biennium. In addition, the Department has preserved the content posted for the 2009, 2010, 2011, 2012, 2013 and 2014 fiscal years in an archive located in the transparency website location.

A screen print of the current website portal can be found in Appendix C of this report.

COMMISSION ACTIONS

At its first meeting in December 2009, the Commission reviewed the initial website mockup and made several recommendations to DAS for changes and enhancements:

- Delete state employee names on website data for salaries
- Include a display of state employee average benefits
- Include state employee names on lists of vendor payments
- Include data on union dues, fair share payments, and political action contributions
- Add contact information on the website for Commission members
- Provide links to local government websites
- Review possibilities for an improved display and standardization of lengthy reports included on the website
- Review possibilities of including data from Semi-Independent Boards and Commissions on the website
- Review the exemption of the State Treasurer

DAS reported on these issues and changes at the Commission's May 2010 meeting and presented the updated website for Commission review. The Commission discussed adding additional links on the website to other entities such as the Committee on Performance Excellence, the Governor's Re-Set Cabinet, ORESTAR (Election Reporting), and other government efficiency sites. Interest was expressed in making the Tax Expenditure Report and data more accessible on the portal page of the website. The Commission also discussed including a web form to easily obtain public feedback on the website and enhancements that the public wants to have included.

At the September 2010 meeting of the Commission, DAS again presented the modified website that included the additional links and other information recommended by the Commission at the previous meeting. Most of these additional links to information were included on the website's "Resources" page. In addition, the Commission received a presentation on the transparency websites of several other government units as potential models for improvements to Oregon's site. These other transparency sites included examples from Kentucky, Texas, Missouri, Illinois, and the City of Albany. The key criteria for an effective website were identified as comprehensive (including contracts and non-contract spending, tax expenditures, quasi-public agencies, and local government); one-stop (all data on one site, not links to other sites, and in one master searchable database); one click searchable (with the ability to download search results to a spreadsheet); raw data access; context (data with explanations of purpose and with performance measures); and updated regularly.

The Commission did not meet in 2011, as four of the original appointments became vacant or expired, including the chair of the Commission and were not reappointed.

At the December 2012 meeting, DAS presented the updated website that included past Commission recommendations as well as additions from legislation passed in 2011 and 2012. The additional information was provided from links on a menu on the main page in order to maximize space limits of the website. DAS reported that Oregon's transparency website score, as rated by the US Public Interest Research Group, is 87%, tied for 8th nationally. The Commission approved the addition of a link on the transparency website to specific data from the Oregon Public Employees Retirement System (PERS). The data that was linked included unfunded liability amounts and employer contribution rates for the state and local governments, school districts, and Education Service Districts. The Commission expressed interest in improving public feedback measurements and providing easier mechanisms for the public to provide input regarding the websites' content.

The Commission met again in November 2013 to adopt the 2013 report, receive an overview and update of the transparency site from DAS, and discuss potential legislation for 2014.

The Commission met in May 2014 to receive an overview and update from DAS as well as a report from the US Public Interest Research Group on ratings of transparency websites across the nation. Oregon received an A-, the highest grade awarded, finishing with the second highest overall point total, half-point behind Indiana, among all other states.

At the October 2015 meeting, the Commission received an update on the website, including the consolidation efforts around the transparency datasets, and reviewed the overall status of the transparency program and resource needs.

The Commission met in January 2016, and received an update on the website and a report on the US Public Interest Research Group's 2015 ratings of transparency websites across the nation. Oregon received an A grade with a score of 96.5, tied for the fourth highest award. It was the fourth straight year Oregon's grade and score had increased.

WEBSITE FUTURE ENHANCEMENTS

While the Commission took no formal action to make recommendations on future website enhancements, the following is a summary of the major topics discussed by the Commission during its deliberations on the website and the changes that should be considered for future iterations:

- Review the funding issue with the Legislature since a robust transparency website needs resources for development and maintenance
- Conduct a survey of the public to determine what is wanted for inclusion in the website
- Provide the ability for easy public feedback
- Improve the ability to search the data fields included on the website and on the data included on other websites linked to the transparency website
- Provide more information on tax expenditures
- Provide the ability to drill down into databases such as the ORPIN site on procurement contracts to search for a particular contract or vendor
- Include a process for State CIO to make recommendations for additions to the website

Due to the passage of Ballot Measure 71 in the November 2010 General Election, the Legislature now meets in annual sessions. The odd-numbered year session is comprised of an organizational session that meets for three days in January. By rule, the organizational session is only meant for procedural activities and does not have the authority to take any action or have any committee activity. Also by rule, the regular session (now limited to 160 calendar days in the odd-numbered year) does not start until February 1st. Given this constitutional change to annual sessions and the manner in which the Legislature has implemented the change, the date for submittal of a report by the Commission was changed in ORS 184.486(13) during the 2013 legislative session from January 15th to February 15th.

APPENDIX A

OREGON TRANSPARENCY LAWS

ORS 184.483 – 184.488

Oregon Transparency Website

184.480 “State agency” defined for ORS 184.480 to 184.488. As used in ORS 184.480 to 184.488, “state agency” means any officer, board, commission, department, division or institution of state government, as defined in ORS 174.111. [2009 c.838 §1; 2011 c.368 §1]

184.483 Oregon transparency website. (1)(a) The State Chief Information Officer shall maintain and make available an Oregon transparency website. The website must allow any person to view information that is a public record and is not exempt from disclosure under ORS 192.410 to 192.505, including but not limited to information described in subsection (3) of this section. The State Chief Information Officer shall provide on the home page of the website a method for users to offer suggestions regarding the form or content of the website.

(b) The Oregon Department of Administrative Services shall assist the State Chief Information Officer in performing duties under paragraph (a) of this subsection to the extent the State Chief Information Officer deems the assistance necessary.

(2) State agencies and education service districts, to the extent practicable and subject to laws relating to confidentiality, when at no additional cost, using existing data and existing resources of the state agency or education service district and without reallocation of resources, shall:

(a) Furnish information to the Oregon transparency website by posting reports and providing links to existing information system applications in accordance with standards that the State Chief Information Officer establishes; and

(b) Provide the information in the format and manner that the State Chief Information Officer requires.

(3) To the extent practicable and subject to laws relating to confidentiality, when at no additional cost, using existing data and existing resources of the state agency or education service district and without reallocation of resources, the Oregon transparency website must contain information about each state agency and education service district, including but not limited to:

(a) Annual revenues of state agencies and education service districts;

(b) Annual expenditures of state agencies and education service districts;

(c) Annual human resources expenses, including compensation, of state agencies and education service districts;

(d) Annual tax expenditures of state agencies, including, when possible, the identity of the recipients of each tax expenditure;

(e) For each state agency, a description of the percentage of expenditures made in this state and the percentage of expenditures made outside this state under all contracts for goods or services the state agency enters into during each biennium;

(f) A prominently placed graphic representation of the primary funding categories and approximate number of individuals that the state agency or the education service district serves;

(g) A description of the mission, function and program categories of the state agency or education service district;

(h) A copy of any audit report that the Secretary of State issues for the state agency or the education service district;

(i) The local service plans of the education service districts;

(j) A copy of each report required by statute for education service districts; and

(k) A copy of all notices of public meetings of the education service districts.

(4) In addition to the information described in subsection (3) of this section:

(a) The State Chief Information Officer shall post on the Oregon transparency website notices of public meetings the state agency must provide under ORS 192.640. If the state agency maintains a website where minutes or summaries of the public meetings are available, the state agency shall provide the State Chief Information Officer with the link to the state agency website for posting on the Oregon transparency website.

(b) The State Chief Information Officer shall post on the Oregon transparency website a link for the website that the Secretary of State maintains for rules that the state agency adopts. If the state agency maintains a website where the state agency posts the rules, or where any information relating to the rules of the agency is posted, the state agency shall provide the State Chief Information Officer with the link to the website for posting on the Oregon transparency website.

(c) The State Chief Information Officer shall provide links on the Oregon transparency website for information that the State Chief Information Officer receives concerning contracts and subcontracts that a state agency or education service district enters into, to the extent that disclosing the information is allowed by law and the information is already available on websites that the state agency or education service district maintains. To the extent available, the information to which the State Chief Information Officer links under this section must include:

(A) Information on professional, personal and material contracts;

(B) The date of each contract and the amount payable under the contract;

(C) The period during which the contract is or was in effect; and

(D) The names and addresses of vendors.

(d) The State Chief Information Officer shall provide an economic development section on the Oregon transparency website for posting of information submitted to the State Chief Information Officer by state agencies responsible for administering specific economic development programs. The section shall include, but not be limited to, the following information, if it is already collected or available within an existing database maintained by the state agency in the course of administering the economic development program:

(A) The names of filmmakers or companies that have received reimbursements from the Oregon Production Investment Fund under ORS 284.368 and the amount of each reimbursement;

(B) The amount of revenue bonds issued under ORS 285A.430 for the Beginning and Expanding Farmer Loan Program, the names of persons who received loans under the program and the amount of the loan;

(C) The names of persons who received grants or loans from the Oregon Innovation Council under ORS 284.735 or 284.742 and the purpose and amount of the grant or loan;

(D) Copies of, or links to, annual reports required to be filed under ORS 285C.615 under the strategic investment program;

(E) Copies of, or links to, annual certifications required to be filed under ORS 285C.506 for the business development income tax exemption; and

(F) Information required to be posted on the Oregon transparency website under ORS 184.484.

(e) The information reported under paragraph (d) of this subsection:

(A) May not include proprietary information; and

(B) Shall be provided to the State Chief Information Officer by the state agency in the format and manner required by the State Chief Information Officer.

(f) The State Chief Information Officer shall post on the Oregon transparency website information describing the process for requesting copies of public records from a public body, including a link to the public records section of the Department of Justice webpage. At the request of a state agency or education service district, the State Chief Information Officer shall include a link to a location on the webpage of the agency or district that describes the process for requesting public records from the agency or district.

(5) In operating, refining and recommending enhancements to the Oregon transparency website, the State Chief Information Officer and the Transparency Oregon Advisory Commission created in ORS 184.486 shall consider and, to the extent practicable, adhere to the following principles:

(a) The website must be accessible without cost and be easy to use;

(b) Information included on the Oregon transparency website must be presented using plain, easily understandable language; and

(c) The website should teach users about how state government and education service districts work and provide users with the opportunity to learn something about how state government and education service districts raise and spend revenue.

(6) If a state agency or an education service district is not able to include information described in this section on the Oregon transparency website because of the lack of availability of information or cost in acquiring information, the Transparency Oregon Advisory Commission created in ORS 184.486 shall list the information that is not included for the state agency or education service district in the commission's report to the Legislative Assembly required under ORS 184.486.

(7)(a) The State Chief Information Officer shall include on the Oregon transparency website a page that provides links to websites established by local governments, as defined in ORS 174.116, and by special government bodies, as defined in ORS 174.117, for the purpose of providing transparency in the revenues, expenditures and budgets of the local governments and special government bodies.

(b) The State Chief Information Officer shall include a link to the local government's or special government body's website after receiving a request from the local government or special government body, and shall consider recommendations from the Transparency Oregon Advisory Commission for including other links to local government and special government body websites.

(c) At the request of any local government, as defined in ORS 174.116, or special government body, as defined in ORS 174.117, the State Chief Information Officer shall include on the Oregon transparency website notices of public meetings required to be provided under ORS 192.640 by the local government or special government body. The local government or special government body must submit public meeting notice information in the format and manner required by the State Chief Information Officer.

(d) The office of the State Chief Information Officer shall include a prominent link on the home page of the Oregon transparency website for information posted to the page described in this subsection. [2009 c.838 §2; 2011 c.368 §2; 2011 c.705 §20; 2013 c.357 §1; 2013 c.645 §3; 2015 c.807 §§19,19a]

184.484 Reports of tax expenditures connected to economic development. (1) For each statute that authorizes a tax expenditure with a purpose connected to economic development and that is listed in subsection (2) of this section, the state agency charged with certifying or otherwise administering the tax expenditure shall submit a report to the State Chief Information Officer. If a statute does not exist to authorize a state agency to certify or otherwise administer the tax

expenditure, or if a statute does not provide for certification or administration of the tax expenditure, the Department of Revenue shall submit the report.

(2) This section applies to:

(a) ORS 285C.175, 285C.309, 285C.362, 307.123, 307.455, 315.141, 315.331, 315.336, 315.341, 315.507, 315.514, 315.533, 316.698, 316.778, 317.124, 317.391 and 317.394.

(b) Grants awarded under ORS 469B.256 in any tax year in which certified renewable energy contributions are received as provided in ORS 315.326.

(c) ORS 315.354 except as applicable in ORS 469B.145 (2)(a)(L) or (N).

(d) ORS 316.116, if the allowed credit exceeds \$2,000.

(3) The following information, if the information is already available in an existing database the state agency maintains, must be included in the report required under this section:

(a) The name of each taxpayer or applicant approved for the allowance of a tax expenditure or a grant award under ORS 469B.256.

(b) The address of each taxpayer or applicant.

(c) The total amount of credit against tax liability, reduction in taxable income or exemption from property taxation granted to each taxpayer or applicant.

(d) Specific outcomes or results required by the tax expenditure program and information about whether the taxpayer or applicant meets those requirements. This information must be based on data the state agency has already collected and analyzed in the course of administering the tax expenditure. Statistics must be accompanied by a description of the methodology employed in the statistics.

(e) An explanation of the state agency's certification decision for each taxpayer or applicant, if applicable.

(f) Any additional information that the taxpayer or applicant submits and that the state agency relies on in certifying the determination.

(g) Any other information that state agency personnel deem valuable as providing context for the information described in this subsection.

(4) The information reported under subsection (3) of this section may not include proprietary information or information that is exempt from disclosure under ORS 192.410 to 192.505 or 314.835.

(5) No later than September 30 of each year, a state agency described in subsection (1) of this section shall submit to the State Chief Information Officer the information required under subsection (3) of this section as applicable to applications for allowance of tax expenditures the state agency approved during the agency fiscal year ending during the current calendar year. The information must then be posted on the Oregon transparency website described in ORS 184.483 no later than December 31 of the same year.

(6)(a) In addition to the information described in subsection (3) of this section, the State Chief Information Officer shall post on the Oregon transparency website:

(A) Copies of all reports that the State Chief Information Officer, the Department of Revenue or the Oregon Business Development Department receives from counties and other local governments relating to properties in enterprise zones that have received tax exemptions under ORS 285C.170, 285C.175 or 285C.409, or that are eligible for tax exemptions under ORS 285C.309, 315.507 or 317.124 by reason of being in an enterprise zone; and

(B) Copies of any annual reports that agencies described in subsection (1) of this section are required by law to produce regarding the administration of statutes listed in subsection (2) of this section.

(b) The reports must be submitted to the State Chief Information Officer in a manner and format that the State Chief Information Officer prescribes.

(7) The information described in this section that is available on the Oregon transparency website must be accessible in the format and manner required by the State Chief Information Officer.

(8) The information described in this section must be provided to the Oregon transparency website by posting reports and providing links to existing information systems applications in accordance with standards established by the State Chief Information Officer. [2011 c.199 §1; 2012 c.45 §24; 2013 c.645 §2; 2015 c.456 §2; 2015 c.807 §20; 2015 c.827 §4]

Note: 184.484 was enacted into law by the Legislative Assembly but was not added to or made a part of ORS chapter 184 or any series therein by legislative action. See Preface to Oregon Revised Statutes for further explanation.

(Transparency Oregon Advisory Commission)

184.486 Transparency Oregon Advisory Commission; members; duties; terms; reports. (1) There is created the Transparency Oregon Advisory Commission consisting of nine members appointed as follows:

(a) The President of the Senate shall appoint two members from among members of the Senate, one from the majority party and one from the minority party.

(b) The Speaker of the House of Representatives shall appoint two members from among members of the House of Representatives, one from the majority party and one from the minority party.

(c) The Governor shall appoint one member from an executive branch agency.

(d) The State Chief Information Officer shall appoint one member.

(e) The Legislative Fiscal Officer shall appoint one member.

(f) The President of the Senate and the Speaker of the House of Representatives shall each appoint one member of the public with experience or interest in public finance, public relations, measurement of performance outcomes or technology.

(2) The commission shall advise and make recommendations to the State Chief Information Officer regarding the creation, contents and operation of, and enhancements to, the Oregon transparency website.

(3) A majority of the members of the commission constitutes a quorum for transacting business.

(4) A majority of the members of the commission must approve official action by the commission.

(5) The commission shall elect one of the commission's members to serve as chairperson not later than October 1 of each odd-numbered year.

(6) If there is a vacancy for any cause, the appointing authority shall make an appointment that becomes immediately effective.

(7) The commission shall meet at times and places that the chairperson or a majority of the members of the commission specifies.

(8) The commission may adopt rules necessary to operate the commission.

(9) The commission shall use the services of permanent staff of the Legislative Fiscal Office to the greatest extent practicable to staff the commission. The State Chief Information Officer may provide additional assistance.

(10) Notwithstanding ORS 171.072, members of the commission who are members of the Legislative Assembly are not entitled to mileage expenses or a per diem and serve as volunteers on the commission.

(11) Members of the commission who are not members of the Legislative Assembly are not entitled to compensation or reimbursement for expenses and serve as volunteers on the commission.

(12) All agencies of state government, as defined in ORS 174.111, shall assist the commission in performing the commission's duties and, to the extent permitted by laws relating to confidentiality, to furnish such information and advice as the members of the commission consider necessary to perform the members' duties.

(13) The commission shall report to the Legislative Assembly not later than February 15 of each odd-numbered year. The report must describe:

(a) Enhancements made to the Oregon transparency website during the previous two calendar years;

(b) Possible future enhancements to the website, including but not limited to including information that relates to:

(A) Performance outcomes that measure the success of state agency programs in achieving goals;

(B) State agency bond debt;

(C) State agency expenses for capital improvements;

(D) Numbers and descriptions of jobs created through state agency contracts and subcontracts;

(E) Lists of businesses and individuals that receive tax credits, deductions, refunds, rebates and other subsidies from a state agency;

(F) Lists of the names of contractors that received a contract from a state agency, including the number of contracts and compensation the contractors received; and

(G) Lists of the number of contracts that each state agency entered into during a biennium and the amount of moneys each state agency spent on the contracts; and

(c) The feasibility of including an interactive application where citizens can simulate balancing a biennial budget for the state.

(14) The term of office of each member is four years, but a member serves at the pleasure of the appointing authority. Before a member's term expires, the appointing authority shall appoint a successor whose term begins on January 1 next following. A member is eligible for reappointment. If there is a vacancy for any cause, the appointing authority shall make an appointment that becomes immediately effective for the unexpired term. [2009 c.838 §3; 2011 c.272 §19; 2013 c.722 §27; 2015 c.807 §21]

184.488 Transparency Oregon Advisory Commission Fund. (1) The Transparency Oregon Advisory Commission may accept contributions of moneys and assistance from the United States Government or its agencies or from any other source, public or private, and agree to conditions placed on the moneys not inconsistent with the duties of the commission.

(2) There is established in the State Treasury, separate and distinct from the General Fund, the Transparency Oregon Advisory Commission Fund. The fund consists of moneys received by the commission under this section and such other moneys as may otherwise be made available by law. Interest earned on the fund shall be credited to the fund. Moneys in the fund are continuously appropriated to the commission and may be used only for the performance of the functions of the commission. [2009 c.838 §4]

APPENDIX B

MEMBERSHIP ROSTER

Name	Appointing Authority	Current Term Expires
Senator Richard Devlin	Senate President	01/01/20
Senator Kim Thatcher	Senate President	01/01/19
Representative Julie Fahey	House Speaker	01/01/20
Representative Gene Whisnant	House Speaker	01/01/19
Thomas Fuller	Governor's Executive Branch	01/01/21
Theresa McHugh	Legislative Fiscal	01/01/21
Brian DeForest	DAS Director	01/01/19
Michael Marsh	Senate President's Public Member	01/01/21
Vacant	House Speaker's Public Member	01/01/20

APPENDIX C

WEBSITE SCREEN PRINTS

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About Transparency

This Web site is a tool to help you get to know your state government. Its purpose is to show you how government works, what your taxes buy, and how purchasing decisions are made.

A good place to start is by reviewing [annual budget information](#), listings of [public meetings](#), and [agency key performance measures](#).



Questions & Information: Send us your questions or suggestions for this website by clicking on the Inbox, using our [online form](#), or sending an email to us at oregon.transparency@oregon.gov. If you have agency-specific questions use this [agency contact link](#).

"New Feature" Subscribe to Oregon Transparency Updates: To receive monthly updates about the Transparency website and Oregon Transparency Program, click the **Subscribe** button or use this [Transparency Updates: Sign-up Link](#).



Disclaimer:

Unless otherwise specified, data throughout this Web site is current as of June 30, 2016. Most of the information is updated on an annual basis.

Please note that the data or information contained on the Oregon.gov/transparency Web site is raw and unaudited. The data or information does not link to any audited financial statement. Because no comprehensive review for accuracy has occurred, the data or information may contain errors, omissions or misstatements. Also, this Oregon.gov/transparency Website excludes data and information that is confidential, private or protected under state and federal laws. Users should not rely on the accuracy or completeness of this data or information for any purpose other than personal knowledge.

<http://www.oregon.gov/>

Oregon Transparency: Public Meetings



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Public Meetings

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- [Public Meetings: Monthly Calendar Views](#)
- [Public Meetings: Quarterly Calendar List Views](#)
- [Public Meetings: Annual List View](#)
- [Oregon Bulletin & Legislative Assembly: Committee Agendas](#)
- [Oregon Commission for the Blind Public Meetings](#)
- [Historical: Public Meetings - Lists](#)

What is a Public Meeting?

The 2011 Oregon Legislature passed [House Bill 2788](#). HB 2788 requires State Agencies, Boards, Commissions, and Education Service Districts (ESDs) to "...post on the Oregon Transparency website notices of public meetings required to be provided by the state agency under [ORS 192.640](#)."

As State Agencies, Boards, Commissions, and Education Service Districts (ESDs) determine which meeting notices to post on this site they will be asking themselves:

Is it a "public meeting"?

- Does the meeting involve a government entity of *any* type - local, regional or otherwise? (This entity is known as a "public body.")
- Do the people attending the meeting have authority to make decisions or recommendations to the public body? (This group is known as a "governing body.")
- Is a quorum required for the governing body to meet in order to make a decision?
- Is the governing body planning to make a decision *or* deliberate toward a decision of *any type* at the meeting?

If the answer to **all** questions is "Yes", the meeting is a "public meeting" and falls under the requirements of [HB2788](#). For additional detail, refer to [ORS 192.610 to 192.690](#).

New Resources: Oregon Public Meeting Manager Application

- [How to Request Access to the Public Meeting Manager](#)
- [How to Create a Data.Oregon.gov User Id](#)
- [How to Post Public Meetings – Instructions](#)

Oregon Transparency: State Budget and Agency Key Performance Measures



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State Budget and Agency Key Performance Measures

[Organization of State Government & Budget Process](#)

[Legislatively Adopted Budget \(LAB\) - graphical view](#)

[State Budget: 2017 - 2019](#)

[Resources](#)

[Agency Key Performance Measures](#)

Organization of State Government & Budget Process

Oregon state government is a large organization. The following resources may help you learn more about the structure, budgets and performance measures.

[Oregon Blue Book](#)

- The Blue Book offers descriptions of state agencies, contact information, budgets and histories that are understandable and accessible. For more information on the agencies that reside within the [Executive Branch](#) of state government, visit the [State Agencies, Boards and Commissions](#) Web page.

Also, see the sections for the [legislative](#) and [judicial](#) branches of state government.

Oregon Budget Process

The state budget is a tool used to carry out state law and policy decisions. The budget, which must be balanced, allocates all revenue resources including General Fund, Lottery, Federal and Other Funds that pay for public services. The budget may authorize debt financing for some projects and activities.

The budget covers two fiscal years, which is a biennium. The biennium begins on July 1 of an odd-numbered year and ends on June 30 of the next odd-numbered year (for example, July 1, 2013 - June 30, 2015).

The budget development process occurs in three major phases: Agency Request, Governor's Recommended Budget, and Legislatively Adopted Budget.

Oregon Public Finance: Basic Facts

[Budget Process Overview](#): DAS Chief Financial Office (CFO)

The Chief Financial Office helps the Governor prepare a budget for the Legislature to consider. This Web site explains the phases of the budget process in detail.

[Oregon Public Finance: Basic Facts \(LRO\) - 2011 Research Report #1-11](#)

This report from the Legislative Revenue Office describes basic facts about public finance. Released in January 2011, the report reflects events that occurred before that date.

[How Positions are Created, Budgeted and Used - Legislative Fiscal Office](#): This report answers common questions about state employees such as: how positions are created, budgeted for, and how much of the budget goes to cover the cost of employees.

Legislatively Adopted Budget (LAB) - graphical view

2015-2017 Legislatively Adopted Budget (through 2016 Session): A summarized pie chart view of Budget Totals by program and funding source are provided below.

Oregon Transparency: Revenue Reports



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Revenue Reports

- [Money Coming In: Revenue Reports and Charts](#)
- [Oregon Lottery: Comprehensive Annual Financial Report](#)
- [Public Finance Basic Facts](#)
- [Additional Resources](#)
- [Quarterly Economic and Revenue Forecast](#)
- [Historical Information](#)
- [New - School District Revenue Data](#)

Money Coming In: Revenue Reports and Charts

A variety of revenue sources fund the operation of state government.

General Fund dollars come almost entirely from income taxes paid by individual Oregonians and Oregon businesses. The General Fund is also the most discretionary source of funds that the Governor and Legislature may spend.

Other Funds are the largest single category of revenues the state receives for the state budget. They include money from some taxes — chiefly those related to highway use, employment, and forests. They also include revenues from state licensing fees and the state's "business-like" incomes, such as tuition and other fees for services, and many funds related to loans or bonds.

State law (either the state constitution or statutes) dedicates Other Funds to pay for specific state services or programs. Other Funds do not include money from property taxes. In fact, all property tax revenues remain under the control of local governments.

Federal Funds are revenues that the federal government has legally dedicated to specific programs and services. The federal government limits the state's choices about where and how to spend this money. Some federal dollars come to the state as a fixed amount for a specific program. Most Federal Funds, however, are matching money for state expenditures.

If the state removes its General Fund dollars from a matched program, the federal government holds back its matching funds. Federal dollars are available only if the state operates the program with the federal government's approval.

Lottery Funds are another significant source of money the state can use for specific purposes. Increasing amounts of Lottery Funds go to dedicated purposes such as higher education sports programs, county economic development, the Education Stability Fund, the Parks and Natural Resources Fund, debt service and treatment of gambling addiction.

Reports

[2015-17 Biennium: Total Available Revenues by Agency - Report](#)

This report shows total General, Other, Lottery, and Federal Fund revenues available to agencies during the 2015-2017 budget biennium (Legislatively Approved Budget) as of September 2016.

It also provides Revenue information for Oregon state agencies, organized by agency # and by fund type (e.g. General Fund, Lottery Funds, Other

Oregon Transparency: Expenditure Reports



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Expenditure Reports

[Multiple Agency - Expenditure Report \(SFMA & Other Systems\)](#)

[Data Viewer - Multi Agency - Expenditure Report](#)

[New - County Lottery Funds - Expenditure Report](#)

[Historical Information](#)

[Historical Information: Expenditures \ Oregon University System \(OUS\)](#)

[New - School District Expenditure Data](#)

Multiple Agency - Expenditure Report (SFMA & Other Systems)

This report provides information on expenditures (i.e., cash transactions/payments) for the agencies that utilize the **Statewide Financial Management Application (SFMA)** issued for the fiscal year 2016 (July 1, 2015 - June 30, 2016).

Generally, the information contained in these agency expenditure files was generated as follows:

* All payments for the fiscal year 2016 (July 1, 2015 through June 30, 2016) that were applied to an expense account within SFMA for the agency.

* Payments to individuals identified in the system (i.e., benefit, foster care, crime victim payments, etc.), not including expenditures to employees, were removed to protect against the inadvertent disclosure of records that may be protected under federal or state law or contractual requirements.

* Payments to employees whose records are specifically protected from disclosure based on a protective court order were removed. Payments to all other employees are included.

* Any payment that did not include a vendor name within SFMA was removed. Many agencies use subsystems to generate checks and only provide SFMA with summary information.

* System entries related to vendors with negative amounts (i.e., credit amounts) were removed.

This Fiscal Year expenditure report does not include credit entries if the vendor line item was negative in total, nor does it include reimbursements by third parties for travel (e.g State of Oregon employee travel paid for, partially or in full, by the US Government, by conference organizers, etc.). This may cause expenditures listed in the report to be overstated, as the credit portion of these types of transactions may be excluded.

This report does not include information on expenditures for the Oregon University System or semi-independent agencies, boards and commissions.

Note 1: The Oregon Lottery, Aviation and ODOT expenditure files are each generated by systems maintained by those agencies, respectively - (i.e. SFMA is not used to generate the information) though these agencies are included in the single file below.

Note 2: For additional information about content removed from reports to ensure proper protection of confidential information and a listing of agencies included in this year's report, click on the following link. [Additional Report Information](#) (pdf)

[Expenditure Data File](#)

Click on the following link to view or download this data set.

Oregon Transparency: Oregon Tax Expenditures



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Tax Expenditures

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- [Department of Revenue \(DOR\) - Reports and Resource Links](#)
- [Energy Related - Tax Expenditures](#)
- [Historical Information](#)

Introduction

Tax Expenditure Defined

The 1995 Budget Accountability Act ([ORS 291.201](#)) defines a tax expenditure as:

any law of the Federal Government or of this state that exempts, in whole or in part, certain persons, income, goods, services, or property from the impact of established taxes, including, but not limited to tax deductions, tax exclusions, tax subtractions, tax exemptions, tax deferrals, preferential tax rates, and tax credits.

The term "tax expenditure" derives from the parallel between these tax provisions and direct government expenditures. For example, a program to encourage businesses to purchase pollution abatement equipment could be structured with an incentive in the form of a tax credit or a direct payment by the state to businesses. Tax expenditures can be viewed as: (1) providing financial assistance to certain groups of taxpayers, (2) providing economic incentives that encourage specific taxpayer behavior, or (3) simplifying or reducing the costs of tax administration. While the third of these policy objectives eliminates inefficiencies within the tax code, the first two *could* be implemented with direct expenditures rather than tax expenditures.

Tax Expenditure Reports

The biennial tax expenditure report accompanies the Governor's recommended budget submitted to the Legislature before each session. It describes provisions of Oregon tax laws that impart special treatment to a group of taxpayers, such as exclusions, credits, deductions, and exemptions. This report describes each provision and provides revenue loss estimates and evaluations of effectiveness. It also includes summary tables that group tax expenditures according to tax program and budget program/function.

See [ORS 291.203](#) for the statutory reference that requires these reports. Links to these reports are provided in the section below.

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Department of Revenue (DOR) - Reports and Resource Links

The links below provide access to Department of Revenue current and historical tax expenditure reports, as well as other tax and statistical reports.

[Tax Expenditure Reports](#)

<http://www.oregon.gov/>

Oregon Transparency: Economic Development



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- [Department of Revenue \(DOR\) - Reports and Resource Links](#)
- [Business Oregon](#)
- [Oregon Governor's Office of Film & Television](#)
- [Enterprise Zones \(EZ\)](#)
- [New - Enterprise Zone \(EZ\) County Assessor & Local Zone Manager Reports](#)
- [New - County Lottery Funds - Expenditure Report](#)
- [Historical Information](#)

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Oregon Transparency: Who Is The State Doing Business With? (Contracts/Procurement)



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Contracts\Procurement: Who's The State Doing Business With?

- [New - ORPIN: Contracts - Composite Report](#)
- [ORPIN: Contracts - Composite Report \(Data Viewer\)](#)
- [ODOT - Highway Construction Contracts Report](#)
- [Lottery Commission - Contracts Report](#)
- [New - Oregon Judicial Department: Contracts - Composite Report](#)
- [Oregon Office of the State Treasurer - Contracts Report](#)
- [New - ORPIN: Expired Contracts - Composite Report](#)
- [Historical Information: Contracts \ Oregon University System \(OUS\)](#)
- [Historical Information](#)

New - ORPIN: Contracts - Composite Report

Department of Administrative Services Procurement Services (DASPS) is the central procurement authority for those state agencies that are subject to DAS authority. The office develops, establishes, and administers statewide contracts for goods and services on behalf of state government and Oregon Cooperative Procurement Program (ORCPP) members. The reports and descriptions listed below reflect the diversity of the environment in state government contracting and procurement.

State law gives many agencies authority to enter into contracts outside the State Procurement Office. Examples include the Oregon Lottery, Judicial Department, Department of Transportation, and the Oregon University System.

New this year, a **composite report** that contains all versions of contracts and amendments issued in ORPIN (Oregon Procurement Information Network) from **July 1, 2009 through June 30, 2016** is provided below. This report is sorted by *agency number* and is machine readable.

[ORPIN Contracts Report: FY 2010-2016 Composite](#)

How to Access the Data: Click on the report above and a new window will open and redirect you to this data.oregon.gov dataset. You will be able to use a wide range of tools to visualize, filter, create graphs, or download the data.

Resource: [Data Dictionary for Contract Awards Issued](#)

Note: This report provides information on contracts and amendments to contracts for state agencies who are subject to DAS contracting authority. These agencies must report their contracting activity through the Oregon Procurement Information Network (ORPIN) system. The contract values reflected in this report are estimates.

Within the ORPIN system, the contract start date may be different than the contract issued date, which is the date the data entry was completed and the contract was entered in the ORPIN system.

Oregon Transparency: State Workforce



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- [State Employees Salaries: Data Viewer](#)
- [Historical Information: Salaries \ Oregon University System \(OUS\)](#)
- [Salaries: Oregon Lottery](#)

About Human Resources

The [Chief Human Resource Office](#) and the Enterprise Human Resources Division within the Department of Administrative Services provide direction and services to state agencies in maintaining a stable and qualified workforce for Oregon state government. Its activities include classification and compensation, HR management and consultation, HR systems, labor relations, statewide recruitment and training.

Under the law, some agencies have authority to manage their workforce independent of DAS administrative rules, policies, and personnel reporting systems. Examples include Oregon Lottery, Oregon Judicial Department, the Oregon University System and Oregon's semi-independent boards and commissions.

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Report: How Employee Positions are Created, Budgeted and Used

The following report was prepared in June 2008, and provides a general introduction to budget related issues for state employees and their positions. It also answers some frequently asked questions about state employees and the budget. Click on the following link to access this report.

[How Employee Positions are Created, Budgeted and Used](#) (.pdf, 92KB)

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State Employees Salaries

Each annual salary listed in this report is 12 times that particular employee's monthly adjusted salary rate as of June 30, 2016. "Annual Salary" includes most differential payments (such as work-out-of-classification and bilingual differential). but excludes

Oregon Transparency: Public Employees Retirement System

Public Employees Retirement System

Oregon Transparency

PERS participates in the [Oregon Transparency Website](#).

The following PERS documents are available:

1. [Summary of Pension Unfunded Accrued Liability by Employer](#). This report shows unfunded PERS pension liabilities for each PERS-participating unit of government as of the most recent valuation date, December 31, 2015. Unfunded Accrued Liability (UAL) is the difference between accrued assets (employer contributions and investment earnings) and accrued liabilities (the cost of pension benefits earned) as of the valuation date.

The report is divided into three sections: employers participating in the State and Local Government Rate Pool, which includes all State Agencies and the Oregon University System (OUS), all community colleges, and those local governments that have elected to be part of the pool; School Districts, which includes all public K-12 school districts, education service districts, and public charter schools; and Independents employers, which are those local governments that have not elected to participate in the State and Local Government Rate Pool. Within each section employers are shown in alphabetical order by employer name. See glossary below.

2. [Summary of PERS Employer Contribution Rates report](#). This report contains the contribution rates PERS-participating employers began paying July 1, 2017.

Please note the following:

- The report is arranged by actuarial pool, with Independent (non-pooled) employers listed first, followed by School Districts, ending with employers participating in the State and Local Government Rate Pool.
- Rates are applied based on pay date. These rates are effective for payrolls dated on and after July 1, 2017, even if the pay was for work performed before that date.
- Rates in this report include normal cost, unfunded actuarial liability (UAL), side accounts (if applicable), and retiree healthcare.
- Rates in this report do not include pickup of the 6 percent employee IAP contribution.
- School districts and charter schools that are not listed individually will pay the rates shown under the employer name "School Districts," employer number 3000, near the bottom of page 7.

3. [PERS by the Numbers](#). This document describes the system demographics, benefits, funding level and status, revenue, and other PERS-related information.
4. [PERS Facts](#). Distillation of PERS by the Numbers.
5. [Board meeting minutes](#). Minutes for the previous PERS Board meeting are the first agenda item in the Board packet for the most recent Board meeting (e.g., the minutes for the 5/31/13 meeting are in the materials for the 7/26/13 meeting).
6. Oregon Administrative Rules (OARs) for PERS. Proposed, recently adopted, and existing PERS OARs.

Glossary

Actuarial accrued liability: The portion of the present value of prospective benefits allocated to service before the valuation date in accordance with the actuarial cost allocation method.

Actuarial asset value: The value of assets used in calculating the required contributions. The actuarial asset value may be equal to the fair market value of assets, or it may spread the recognition of certain investment gains or losses over a period of years in accordance with an asset valuation method.

Oregon Transparency: Public Records Request



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Public Records Request

During the 2015 Legislative Session [SB 515](#) was passed, and the following information was requested as an addition to the Oregon Transparency Website. "Information describing the process for requesting copies of public records from a public body, including a link to the public records section of the Department of Justice webpage," shall be posted to the Oregon Transparency website. Per this request, the following informational links are provided.

Department of Justice

- [Request for Public Records Form](#) (pdf)
- [Citizens Guide to Public Records and Meetings](#)
- [General Public Records and Meetings Law](#)

Governor's Office

- [Public Records Request Policy](#)
- [Make a Public Records Request](#) (online form)
- [Public Records Log](#)

Other Agency Links

- Business Oregon [General Public Records Information](#)
- Bureau of Labor and Industries [How to Request Public Records from BOLI](#)
- Oregon Department of Administrative Services [How to Request Public Records from DAS](#)
 - [Public Records Request Policy](#)
 - [Public Records Requests – Frequently Asked Questions \(FAQ's\)](#)
- Oregon Department of Agriculture
 - [Public Records Request](#)
- Oregon Department of Consumer and Business Services [Public Records Request](#)
 - [DCBS Public Records Request Form](#)
- Oregon Department of Corrections [Department of Corrections Public Records Information](#)
- Oregon Department of Education [How do I request access to public records?](#)

Oregon Transparency: Education Service Districts (ESD's)



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- [ESD Revenues \(Money Coming In\)](#)
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- [ESD Audit Reports \ Local Service Plans \ Other Resources](#)
- [ESD History](#)

Introduction

The purpose of Oregon's Education Service Districts is defined in Oregon law (Oregon Revised Statute [ORS 334.005](#)). Education Service Districts originated in Oregon's first laws establishing a general system of common schools - a system that has maintained but changed the responsibilities and names of Oregon's mid-level education service entity.

Throughout the history of Oregon's regional services system, local governance and state statutes concerning the mission of ESDs has remained somewhat constant: "Education Service Districts assist school districts and the State of Oregon in achieving Oregon's education goals by providing equitable educational opportunities for all of Oregon's public school students."

Each ESD provides regional services to its component school districts, primarily in areas that the school districts alone would not be able to adequately and equitably provide. Examples include high cost technology systems and children with severe disabilities who qualify under the category of high cost but low incidence. These services are basically offered within four large categories: Special Needs Children, School Improvement, Technology, and Administrative services.

Today, there are **19 ESDs** serving Oregon's **36** counties.

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ESD Revenues (Money Coming In)

Funding Overview

Education service districts in Oregon are funded through multiple funding sources: Property taxes, state & federal contracts and grants, state timber receipts, and the State School Fund (SSF) formula.

ESD's General Fund, funding comes from a set amount per ADMw (Average Daily Membership weighted). This amount is made up of property taxes at a unique permanent tax rate. Other general fund sources are state timber tax receipts and the Oregon State School Funds (SSF).

Apportionment

- Each ESD, by statute, must spend at least 90% of their total SSF funds directly on school district programs or services. The other 10% is allocated for the operation of the ESD.
- State contracts, such as Early Intervention/Early Childhood Special Education and Long-Term

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Local Government Transparency

[Local Government and Special Government Bodies](#)
[City Government Transparency](#)
[County Government Transparency](#)
[New - County Lottery Funds - Expenditure Report](#)

Local Government and Special Government Bodies

[HB 2370](#) which passed during the 2013 Legislative session requires the Department of Administrative Services (DAS) to create a new page on the Transparency website. This page will provide links to websites established by local government (as defined in ORS 174.116) and; Special government bodies (as defined in ORS 174.117) for the purpose of providing transparency in the revenues, expenditures and budgets of the public bodies. DAS will include additional links on this webpage, upon receiving a request from a public body. The Transparency Oregon Advisory Commission may also recommend links to include on this webpage

Local government: as defined by [ORS 174.116](#)

Special government bodies: as defined by [ORS 174.117](#)

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City Government Transparency

[League of Oregon Cities \(LOC\)](#)

- [City Charters](#)
- [City Codes](#)
- [City Incorporation Dates](#)
- [City Populations](#)
- [City Web Sites](#)
- [Small Cities Support Network](#)
- [Map of Oregon Cities](#)
- [Local and Regional Document Archive](#)
- [Reports, Surveys, and Other Resources](#)
- ["New" Open Data Portal \(League of Oregon Cities\)](#)

<http://www.oregon.gov/>

The following section contains a series of hyperlinks to information on the 25 most populous cities in Oregon (according to the 2010 Census). Links to other Oregon city websites and information will be

Oregon Transparency: Quasi-Public Agency



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Quasi-Public Agency

- [What is a Quasi-Public Agency?](#)
- [Home Forward \(Formerly: The Housing Authority of Portland\)](#)
- [Lane Transit District \(LTD\)](#)
- [Oregon Health Sciences University \(OHSU\)](#)
- [Portland Development Commission \(PDC\)](#)
- [Port of Portland](#)
- [SAIF Corporation](#)
- [TRIMET](#)

What is a Quasi-Public Agency?

In general, a "quasi-public" agency is a publicly chartered body that provides a public service and is overseen by an appointed board, commission, or committee. Typically, these organizations do not rely on the State's General Fund to operate.

The information below is for a number of quasi-public agencies in the State of Oregon and was obtained directly from each of the respective websites.

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Home Forward (Formerly: The Housing Authority of Portland)

The mission of Home Forward is to assure that the people of the community are sheltered. Home Forward has a special responsibility to those who encounter barriers to housing because of income, disability, or special needs. Home Forward will continue to promote, operate and develop affordable housing that engenders stability, self-sufficiency, self-respect and pride in its residents and represents a long-term community asset. Home Forward will be a community leader to create public commitment, policies, and funding streams to preserve and develop affordable housing.

Four Commissioners represent the City of Portland, two represent the City of Gresham, and two represent Multnomah County. A ninth member — who participates in one of Home Forward's housing programs — represents the residents and program participants. Commissioners are recommended from the area they serve, appointed by the Mayor of Portland, and approved by the Portland City Council. They serve on the Board for a four year term that is renewable.

- [Home Forward - General Website](#)
- [Program Reports](#)
- [Financial Reports](#)

Oregon Transparency: Administrative Rules (Secretary of State)



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Administrative Rules

[Agency Administrative Rules](#)
[Secretary of State Administrative Rules](#)

Agency Administrative Rules

[HB 2370](#), passed during the 2013 legislative session, requires all agencies that maintain a website or webpage that displays the agency's rules or information related to the agency's rules, must also display links to those websites or webpages on the Oregon Transparency website. To facilitate the gathering of these links, the Department of Administrative Services provides agencies with access to an online submission form.

Review this aggregated dataset at [Agency Administrative Rules/Information About Rules](#).

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Secretary of State Administrative Rules

Rules adopted by state agencies are provided through the Oregon Secretary of State's website.

Administrative Rules: [Listed Alphabetically](#) (Agency subdivisions are listed under the parent agency name (e.g., Elections Division is under Secretary of State)

Administrative Rules are Listed by: [Agency Number](#)

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Oregon Transparency: Agency Key Performance Measures



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Agency Key Performance Measures

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[Oregon State Agencies A - E: Annual Performance Progress Reports](#)

[Oregon State Agencies F - M: Annual Performance Progress Reports](#)

[Oregon State Agencies N - P: Annual Performance Progress Reports](#)

[Oregon State Agencies Q - Z: Annual Performance Progress Reports](#)

[Historical Data - Annual Performance Progress Reports](#)

Introduction

Oregon adopted a multi-level approach to measuring the performance and outcomes of state government. The Legislative Fiscal Office and the Budget and Management Division of the Department of Administrative Services adopted a set of criteria that agencies must meet when developing measures. Performance Measures must:

- Gauge progress toward agency's goals and mission,
- Use standard terminology and definitions,
- Be few in number,
- Identify performance targets to be achieved during the two year budget cycle,
- Use accurate and reliable data sources,
- Measure customer satisfaction,
- Assign an organizational unit responsible for achieving the target, and, Address comparable information, where possible.

During the budget deliberation process of each legislative session, the Legislature will approve, disapprove, or change/update each agency's proposed biennial performance measures.

Annual Performance Progress Report (APPR)

Each year agencies submit an Annual Performance Progress Report (APPR) to the Legislative Fiscal Office. The report provides detailed analysis of the agency Key Performance Measures and includes the following for each measure.

- How We are Doing
- Factors Affecting the Results

Current Annual Performance Progress Reports (APPR's) are provided below. Oregon State Agencies are sorted alphabetically and divided into four sections: Oregon State Agencies A - E; F - M; N - P; and Q - Z.

For these yearly reports, agency reporting timelines may differ depending on their Key Performance Measures (KPMs). If an agency does not submit an updated report by December 31st, it will be listed as **Unreported** in the tables below, until the report is received. For additional information about specific agency reports, please contact the agency directly.

[Historical Data](#)

Historical APPR data and informational reports are provided through this link.

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Additional Resources

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| Audits | Oregon Blue Book |
| Bond Information | Oregon Legislative Assembly |
| Benchmarking State Business Incentives | ORESTAR - Campaign Finance Information |
| Oregon Chief Operating Officer | Public Employees Retirement System |
| Education Spending & Performance | Quasi-Public Agencies |
| Interactive Maps | State Revenue Forecast |
| Local Government Information | 2009 - 2013 Federal and State Stimulus Funds |
| Money Owed to the State | |

Audits

Secretary of State Audits

Audits

Division: This Web site allows visitors to view audits by agency or by the year the audit was published.

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Bond Information

State Bond Advisory Commission

- [State Debt Policy Advisory Commission and Annual Reports](#)
- [2014 State Debt Policy Advisory Commission \(SDPAC\) Report](#): This January 17, 2014 report is intended to provide state policy makers and the public with a picture of the State's bonding capacity targets for the next few years.

Municipal Debt Advisory Commission

The Oregon Municipal Debt Advisory Commission (MDAC) was established in 1975 to assist local governments in the cost-effective issuance, sale, and management of their debt. The Commission is composed of seven members, including the State Treasurer, three local government finance officers, one representative for the special districts, and two other public members. The Debt Management Division of the Oregon State Treasurer's Office ("OST") is staff to the Commission. State law ORS 287A.634