

Director's Excellence Award Nomination

I would like to nominate the members of the Office of Budget, Policy and Analysis, or the DHS Dedicated Budget Unit, for their excellent work that helps move DHS towards its mission of helping Oregonians in their own communities achieve well-being and independence through opportunities that protect, empower, respect choice and preserve dignity; Innovative ideas and continuous improvement efforts that increase the agency's ability to produce positive outcomes; Exceptional efforts that make a demonstrable, positive difference in people's lives; and Exemplary demonstration of our Core Values in action: Innovation, Integrity, Professionalism, Respect, Responsibility, Stewardship and Service Equity.

It seems like a tough task to nominate a unit for something that most consider just doing their job but it is important to note that the team members of this unit arguably do more than any other budget unit in the State given the size and complexity of this budget and the number of staff allotted to do the work. In the next few paragraphs I will attempt to outline how the continuous work that the Budget team does addresses the award criteria.

Exceptional Efforts: It must be said that as an agency we have balanced our budget for two consecutive biennia and we are working on the third one as I write this. Now by no means am I attempting to take credit for this as it is a multifaceted effort by all parts of the organization. I will say that given the tremendous challenges of data instability, changing political climate, changing funding streams, changing leadership, lawsuits, seemingly impossible legislative mandates and everything else; balance has been achieved. Some of the success must be credited to the work that is being produced by this shop. I will take the liberty of quoting two past Executive Team Members: "the reports that are coming out of your shop are the best that I have seen in many years with this agency", "don't downplay the effect your work is having on this agency, what your team is doing is a positive change for DHS". This team works long hours, often at home and on the weekends to meet the increased work demands that have come with the change that is occurring in this agency, just keeping up in addition to finding new ways to track and report the activities of an ever-changing environment takes time, commitment, dedication and a belief that the work that is being produced is having a positive effect toward helping this agency meet its goal of serving Oregon's most vulnerable citizens.

Outstanding Work: Throughout this biennium as an agency we have faced many challenges. We have totally restructured how we look and how we deliver services. We have had to make adjustments to what is now called the "new normal" that is also a result of the numerous change initiatives and new systems changes and implementations. The new normal is not just what is happening in the economy but in how we deliver services, create budgets, provide reports, track metrics and interact with each other. This creates huge issues for the Budget unit as we have no reliable data and sometimes not data at all. In Child Welfare we have had to find ways to extract meaningful data from a new system by going to the sources of information. In Self Sufficiency we have had to follow and try to stay ahead of the changes that rapidly occurred during the recent recession and the implications to TANF, ERDC and SNAP. In APD we have tried to be ahead of the changes that were initiated by LTC 2.0 and in I/DD we have had to find

ways to discover data as we transitioned to Plan of Care; in APD and I/DD we have also been finding ways to adjust to the unknown implications of the K Plan. Despite all of these changes and struggles we have continued to meet regularly with Program Directors and complete the monthly financials by 1st of each coming month. Finally, we have been thrown into the middle of several lawsuits that are consuming huge amounts of time and effort as there has been little or no direction given on what is needed, but we seem to provide the right information at the right time.

Innovative Ideas and Continuous Improvement: Over the last two biennia and even as we enter this upcoming one, this agency has undergone tremendous change in structure and reporting needs. This has required uncountable hours of work and effort to maintain sometimes 2, 3 or even 4 different financial views in order to report out expenditures and keep managers informed and the organization on track. Our charge is finding a way to update all of our models and create new models to reflect and report the many changes that are sometimes still in process. We have created ways to show all iterations of change as they occur and work with finance to present accurate moments in time, so that decisions can be made. In this same time the Budget team has also undergone numerous changes such as consolidation from two teams and being downsized from around 20-22 staff with two managers to one team of 8-9 with one manager. These changes however have come with a workload that has arguably tripled over the course of 3 years and will increase as we enter the new biennium as the Services provided to Oregonians is challenged the the decrease in funding from all sources. Probably our biggest challenge is educating managers on their budgets, how to read them, understand them, use them and most of balance to them. For this we have developed ways to present several pictures so that managers can find them useful and understandable.

Exemplary demonstration of Core Values: Working for this department is a very hard and at times feels like a thankless endeavor. This team is composed of very smart, dedicated and professional individuals who have chosen to serve the citizens of this state. A few years ago we made a decision that Budget would be an active asset to this department through providing assistance and meaningful information to all managers in every unit, regardless of where they sit on the on the pay chart. The charge was to become more than “excel jockey’s” simply pumping out information to becoming “business advisor” or “business consultant” who understands the programs and help those programs meet their current needs as well as prepare for their future. In order for this to happen this team had to make the decision to be innovative in their work and ideas; demonstrate a high degree of integrity as they provide and stand by their work; improve their level of professionalism in both their interactions and by presenting high levels of accurate and meaningful reports, advice and information; be respectful and mindful of the client, understand their levels of working with budgets and financial information; responsible in meeting deadlines and doing what they say they are going to do; demonstrate a high level of stewardship by remembering the reality of who this department serves as they work with their clients first in lieu of taking an overbearing stance on meeting the bottom line; and demonstrate service equity by providing the same high level of service to each client regardless of who or where they work.

One last thing: When I describe what we do I like to use a description of a large cruise ship getting ready for a voyage. The role of the budget team is one that begins with the planning of the trip and all the logistics involved, the trip must be planned considering what it will take from the minute the crew steps on board, supplies ordered, stops arranged, fuel consumption, weather maps consulted, international lines that may be crossed, other traffic and how many guest to expect including those that will leave and new ones that will board on stops along the way. Once the ship begins its voyage the team must begin gathering data from navigation, weather reports, engine room reports, status of the crew, status of the supplies, status of the guests and any other unplanned anomalies that may occur. This data must be compiled and reported back in timely and meaningful manner to the Capitan and the managers in charge of the different areas of responsibility so that they can make corrections and adjust along the voyage. About half way through that voyage the team must begin the preparation process all over again so that once the current voyage is completed the ship can quickly empty and prepare to immediate set off on its next trip. Since the ship never stops the team must simultaneously close out any loose ends from the previous voyage so that a correct historical record is kept. In the world of support or back office work success is usually measured by quietly doing your job, getting things done and not causing any problems for those for whom the support is given.

I could go on singing the praises of the exceptional work that this unit is performing but that is not who we are. As stated above, the mark of success for this type of unit is demonstrated by providing services in a seamless method that is not seen or noticed as the department to perform its mission. I hope that I have presented an accurate and convincing argument for this unit's contention as a viable candidate for the Director's Excellence Award.

Thank you very much for your time and consideration.

Very truly yours,

Ralph Amador
Director, Office of Budget, Policy and Analysis