

BUDGET ANALYSIS – POWER BI CROSSWALK

In addition to the traditional Budget Analysis (BA) published by the Legislative Fiscal Division (LFD) for the 2021 Legislative Session, the LFD is introducing an interactive data visualization tool using Power BI to give legislators the ability to quickly view different aspects of the budget summarized in table and graphic format. While the BA is static, the Power BI visualizations will be updated with each new version of the budget, allowing for a more adaptive and current view of the 2023 biennium budget.

WHERE CAN I FIND THESE?

Both the pdf version of the BA and the online Power BI model will be electronically available on the agency websites within the LFD website. That web address is <https://leg.mt.gov/lfd/state-agency-profiles/> and from there you can navigate to individual agencies through the “Select Budget Committee or Agency” dropdown button.



Budget Committee Information

Within each agency, “Tab 7 – LFD Budget Analysis” will be home to both budget overviews.

1 AGENCY/PROGRAM BIENNIUM COMPARISON

The first table found in the BA is the same information on the P1 image in the Power BI. This data is a comparison of the 2021 Biennium to the proposed 2023 Biennium budget. This table shows the changes between biennium budgets by both fund type (general fund, state special revenue, federal) and primary expenditure categories (personal services, operating, grants, etc.).

*In the BA, the first section will show the agency summary. This table will be shown again as a summary for each program in subsequent sections of the BA. In Power BI, you will need to choose which agency you want to view, and then can further filter down to individual programs without moving away from P1 in the display screen. (These filter dropdowns will appear like the image below.)

DEPARTMENT	PROGRAM
DEPARTMENT OF PUBLIC HEALTH & HUMA... Budget Item	All Appropriated Budget 20-21 Requested Budget 2022-2023
	Biennium Change Biennium % Change

2 AGENCY/PROGRAM ACTUALS AND BUDGET COMPARISON

This second table is typically found on page 2 or 3 of each agency and program section in the BA (after the highlights table), and breaks the biennium information out into individual years, as well as showing the FY 2020 actual expenditures for comparison.

This has been replicated on P2 within the Power BI tool, and has the same agency and program filter options as P1.

3 FUNDING BY SOURCE OF AUTHORITY

In the BA, analysts have written narrative and charts/tables (where appropriate) to describe different aspects of the agency and its budget proposal. After this narrative, the next section is “Funding” and includes a summary table for the agency and more detailed individual funds information in each program.

P3 provides a BI visual of this information, with one additional advantage: With the filters available, you can see the entire list of funds used in each agency rather than just at the program level. This also summarizes the fund appropriations where a single fund is being used across multiple programs.

	Fund Totals	HB2 Total Ongoing	HB2 Total OTO	Non-Budgeted Proprietary	Statutory Appropriation	Total All Sources
⊕ General Fund		11,483,501			3,600,001	15,083,502
⊕ State Special Total		14,344,783	199,926		73,243,284	87,787,993
⊕ Federal Special Total		41,918,378			2,088,925	44,007,303
⊕ Proprietary Total		5,992		145,176,536	6,470,788	151,653,316
Total All Funds		67,752,654	199,926	145,176,536	85,402,998	298,532,114

4 BUDGET SUMMARY BY CATEGORY

Immediately following the funding discussion in the BA, is a table that summarizes the agency or program budget by the amounts that are part of the base, and how much is statewide present law, present law, or new proposals.

This exact same information is summarized in Power BI, with the ability to filter by agency and program.

Change Type	General Fund Budget Fiscal 2022	General Fund Budget Fiscal 2023	General Fund Biennium Fiscal 22-23	Total Funds Budget Fiscal 2022	Total Funds Budget Fiscal 2023	Total Funds Biennium Fiscal 22-23
2021 Base	815,517	815,517	1,631,034	18,941,013	18,941,013	37,882,026
SWPL	87,147	36,291	123,438	298,947	269,960	568,907
PL	201,429	82,464	283,893	191,392	423,242	614,634
NP				54,029	54,029	108,058
Total	1,104,093	934,272	2,038,365	19,485,381	19,688,244	39,173,625

5 PRESENT LAW ADJUSTMENTS & 6 NEW PROPOSALS

Each of these two tables appears in the BA only at the program level, not in the agency summary. The table summarizes each “decision package” in the proposed budget and the total fiscal impact. If a program has no new proposals, that table will not appear.

In the online Power BI data, these are P5 & P6 respectively. The advantage is this allows you to have the ability to view the table of these decision packages for the entire agency in a single view.

As a budget decision-maker, we hope you find the online interactive Power BI data tool to be useful. LFD anticipates continued work on the tool and any feedback regarding improvements to help you to make informed decisions is encouraged.