



Performance-Based Budgeting Timeline



July 1

Fiscal Year begins.

Mid-July

Appropriation letter packages are transmitted by Office of Planning and Budget (OPB) to budget units. Transmission is electronic. Package includes: general budget control information; enacted appropriation, by program; performance standards as enacted; guidelines, instructions, and form for submission of requests to adjust enacted performance objectives, indicators, and standards; and Joint Legislative Committee on the Budget (JLCB) meeting schedule for the first half of the fiscal year.

Mid-July

Agencies submit carryforward BA-7 requests to rebudget funds from prior fiscal year to the OPB, JLCB, and Legislative Fiscal Office (LFO).

August 8

Louisiana Performance Accountability System (LaPAS) opens for Fourth Quarter (Yearend) Performance Progress Reports (PPRs) for fiscal year just ended. Before database is open for reporting, the OPB modifies performance standards to conform to performance adjustments approved between April 1-June 30. (LaPAS opening dates are not set in statute. However, the OPB generally opens LaPAS approximately 30 days before the statutory due date for a quarterly performance progress report.)

Before August 15

JLCB meeting. Carryforward BA-7s are heard by the JLCB at this meeting. Typically, there is no JLCB meeting in July. The August JLCB meeting occurs before August 15 because of the need to dispose carryforward BA-7s prior to the yearend closeout.



August 15

Deadline for agencies to submit requests for adjustments to performance objectives, indicators, and standards for the current fiscal year. To do this, performance adjustment requests are submitted to the OPB and JLCB (one copy to the LFO and one copy to the House Fiscal Division [HFD]). Requests must be based on Title 39 criteria or appropriation act language directing submission of new or modified performance information. Requested adjustments are subject to review and approval of Division of Administration and JLCB Performance Review Subcommittee.



September 1

Legislative Auditor provides JLCB Performance Review Subcommittee with an assessment of those agencies that are deficient in their capacity to execute the requirements of performance progress reporting.



September 1

Deadline for the OPB to submit any other recommendations for adjustments to performance objectives, indicators, and standards to the JLCB Performance Review Subcommittee.

September 1-30

OPB performs initial population of LaPAS for current fiscal year performance progress reporting.



September 8

Due date for agency submission of Fourth Quarter (Yearend) PPRs, which cover July 1-June 30 of the fiscal year just ended. For this report, yearend actuals for all performance indicators (PIs)—key, supporting, and general performance information (GPI) level—are reported. For key, supporting, and GPI indicators, the prior year actual cell is active. For key indicators, all quarter actual cells are active. For supporting indicators, second and fourth quarter actual cells are active. For GPI indicators, prior year actual and fourth quarter actual cells are active. Prior year actual and previous quarter actual cells are open so reporting agencies may revise or correct any actual entry for the fiscal year. LaPAS remains open for 10 days after due date. However, reports submitted during this additional 10-day period are considered late.

September 18

End of PPR late reporting period. LaPAS closes for Fourth Quarter (Yearend) reporting at end of workday. Agency PPRs are considered delinquent if not submitted by the end of this 10-day late period. The OPB notifies the LFO and HFD of close of reporting period and identifies delinquent reports.

September 20-30

PPR review agencies (LFO and HFD) download Fourth Quarter (Yearend) performance data from LaPAS.

Mid-to-Late
September

JLCB Performance Review Subcommittee meeting. Performance adjustment requests submitted by agencies and other adjustments recommended by the OPB or committee staff are considered and disposed.

Mid-to-Late
September

JLCB meeting. Agencies must submit BA-7s requests to the OPB, JLCB, and LFO a minimum of 16 days before the JLCB meeting in order to be considered for placement on the JLCB meeting agenda.



September 20

Deadline for OPB to transmit instructions for preparation of the operating budget request for the upcoming fiscal year.

30 days after
4th Q PPR due

LFO provides JLCB Performance Review Subcommittee with a summary of Fourth Quarter (Yearend) PPR issues.

October 1-7

OPB modifies initial performance standards in current year LaPAS to conform to performance standard adjustments and BA-7 adjustments approved between July 1-September 30. Database is then “frozen”—that is, performance standards remain at value as of September 30 until after First Quarter reporting is concluded and review agencies download performance data.

October 8	LaPAS opens to agencies for First Quarter performance progress reporting for current fiscal year.
Mid-to-late October	JLCB meeting. Agencies must submit BA-7s requests to the OPB, JLCB, and LFO a minimum of 16 days before the JLCB meeting in order to be considered for placement on the JLCB meeting agenda.
 November 1	Capital outlay budget requests due to Office of Facility Planning and Control.
November 1	Deadline for agencies to submit operating budget request packages to the OPB, LFO, HFD, Senate Fiscal Services, and Office of the Legislative Auditor.
 November 8	Deadline for agency submission of First Quarter PPRs, which cover the period of July 1-September 30 of the current fiscal year. Actual performance figures for key PIs are reported. Interim quarterly targets for key and supporting PIs are cast. LaPAS remains open for 10 days after due date. However, reports submitted during this 10-day period are considered late.
Mid-to-late November	JLCB meeting. Agencies must submit BA-7s requests to the OPB, JLCB, and LFO a minimum of 16 days before the JLCB meeting in order to be considered for placement on the JLCB meeting agenda.
November 18	End of PPR late reporting period. LaPAS closes for First Quarter reporting at end of workday. Agency reports are considered delinquent if not submitted by the end of this 10-day late period. The OPB notifies the JLCB of close of reporting period and identifies delinquent reports.
November 20-30	PPR Review agencies (LFO and HFD) download First Quarter performance data from LaPAS.
 December 5	Act 160 management analysis reports due to the OPB and standing committees of the House and Senate that have agency oversight. This report is the responsibility of department undersecretaries (or equivalent positions in non-cabinet departments).
 30 days after 1 st Q PPR due	The LFO provides JLCB Performance Review Subcommittee with a summary of First Quarter PPR issues.
Mid-to-late December	JLCB meeting. Agencies must submit BA-7s requests to the OPB, JLCB, and LFO a minimum of 16 days before the JLCB meeting in order to be considered for placement on the JLCB meeting agenda.
 January 1	The OPB submits continuation budget for upcoming fiscal year to JLCB.

January 7	The OPB concludes modification of performance standards in current year LaPAS to conform to adjustments approved between October 1-December 31. Database is then “frozen”—that is, performance standards remain at value as of December 31 until after Second Quarter reporting is concluded and review agencies download performance data.
January 8:	LaPAS opens to agencies for Second Quarter (Midyear) performance progress reporting for current fiscal year.
Mid-to-late January	JLCB meeting. Agencies must submit BA-7s requests to the OPB, JLCB, and LFO a minimum of 16 days before the JLCB meeting in order to be considered for placement on the JLCB meeting agenda.
 February 8	Deadline for agency submission of Second Quarter (Midyear) PPRs. Reports must include key and supporting indicator actuals for July 1-December 31 of the current fiscal year. Prior year actual cells are active for key, supporting, and GPI indicators. Interim quarterly targets for Third Quarter and Fourth Quarter may be modified by agencies. LaPAS remains open for 10 days after due date. However, reports submitted during this 10-day period are considered late.
February 18	End of PPR late reporting period. LaPAS closes for Second Quarter (Midyear) reporting at end of workday. Agency reports are considered delinquent if not submitted by the end of this 10-day late period. The OPB notifies the JLCB of close of reporting period and identifies delinquent reports.
February 20-28	PPR review agencies (LFO and HFD) download Second Quarter (Midyear) performance data from LaPAS.
Mid-to-late February	JLCB meeting. Agencies must submit BA-7s requests to the OPB, JLCB, and LFO a minimum of 16 days before the JLCB meeting in order to be considered for placement on the JLCB meeting agenda.
 30 days after 2 nd Q PPR due	The LFO provides JLCB Performance Review Subcommittee with a summary of Second Quarter PPR issues.
 45 days before legislative session	The OPB submits Executive Budget and Executive Budget Supporting Document to the JLCB; OPB submits appropriation bills for introduction. (For first year of a gubernatorial administration, deadline is 30 days before legislative session.)
Mid-to-late March	JLCB meeting. Agencies must submit BA-7s requests to the OPB, JLCB, and LFO a minimum of 16 days before the JLCB meeting in order to be considered for placement on the JLCB meeting agenda.
 Last Monday in March	Legislative Session (Full General Session) starts. This occurs in even numbered calendar years. Full general sessions last for a maximum of 85 calendar days.

April 7	The OPB concludes modification of performance standards in current year LaPAS to conform to adjustments approved between January 1-March 31. Database is then “frozen”—that is, performance standards remain at value as of March 31 until after Third Quarter reporting is concluded and review agencies download performance data.
April 8	LaPAS opens to agencies for Third Quarter performance progress reporting for current fiscal year.
Mid-to-late April	JLCB meeting. Agencies must submit BA-7s requests to the OPB, JLCB, and LFO a minimum of 16 days before the JLCB meeting in order to be considered for placement on the JLCB meeting agenda.
 Last Monday in April	Legislative Session (Fiscal Only Session) starts. This occurs in odd numbered calendar years. Fiscal only sessions start on the last Monday in April and last for a maximum of 60 days.
 May 8	Deadline for agency submission of Third Quarter PPRs, which must include key indicator performance actuals for July 1-March 31 of the current fiscal year. Interim quarterly targets for Fourth Quarter may be modified by agencies. LaPAS remains open for 10 days after due date. However, reports submitted during this 10-day period are considered late.
May 18	End of PPR late reporting period. LaPAS closes for Third Quarter reporting at end of workday. Agency reports are considered delinquent if not submitted by the end of this 10-day late period. The OPB notifies the JLCB of close of reporting period and identifies delinquent reports.
May 20-31	PPR review agencies (LFO and HFD) download Third Quarter performance data from LaPAS.
Mid-to-late May	JLCB meeting. Agencies must submit BA-7s requests to the OPB, JLCB, and LFO a minimum of 16 days before the JLCB meeting in order to be considered for placement on the JLCB meeting agenda.
Mid-June	The OPB transmits instructions for carry forward BA-7s to agencies.
 30 days after 3 rd Q PPR due	The LFO provides JLCB Performance Review Subcommittee with a summary of Third Quarter PPR issues.
 June 30	Fiscal Year ends.

