

Introduction to CBO: Its Role, Services, Products, and Communications - Transcript

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Hello welcome back to the introduction to CVO. It's role, service, product, and communications. This conferences recording and you'll receive links to this recording after the event. Please welcome Dave Kilroy is our speaker.

Hello everyone thanks for having me it's a privilege to be here to today. More importantly thank you all for your public service that you will provide. Just a little bit about me before talk about the agency that I'm so grateful to work for. Of got my roots in public service. I started out as a journalist for 15 years looking at the CBO and we just feel like we've got a kinship and that the Federal Depository Library program and CVO being objective and nonpartisan some of you might be more familiar here we are and what we do the second half really talked about the products and communications so how we've taken some new approaches in assisting the Congress during the pandemic. So with no further ado, I will begin. The first part of my conversation I like to have this about the CVO rule and our structure. We were created a little more than 45 years ago. This was our 45th anniversary. Created by the Congressional budget and empowerment act. The control act of 1974 to give Congress a stronger role in budget matters. We provide analysis from budget analysis issues that subjective and impartial. We don't make policy recommendations. So our mission is to help the Congress make effective budget economic policies. We offer an alternative to the information provided by the OMB. With the Congress budget office. The directors joined by the speaker of the house and the president of the Senate. This director has a four-year term that is Phil S, he just crossed over his first year mark in June so keys been in office a little bit more than a year now. CBO has like hundred and 60 employees hired on the basis of professional competence with regard to professional affiliation. It's going to be a very diverse workforce as well so we believe that retracting and retaining a diverse workforce is great. Having the best possible staff for work benefits and perspectives. I know this may be kind of small but I just wanted to get across the visual of how were organized. 130 the agency about one third of the 260 staff works in our budget analysis division. This division produces and is primarily responsible for the cost estimates that most of you probably know best, I think CBO is known primarily and mainly for the cost estimates that we produced that often gets at various times, more attention depending on what policymakers tend to be talked about. The budget analysis division is one third of the agency and that's a very common that's at the very topic is program divisions that are broken up into pieces of the budget or what we essentially do for the Congress. For health retirement and long-term analysis. Producing our economic productions and the work on climate and infrastructure. Focusing on the analysis division and the tax analysis division it's really kind of an overview of how we are organized. So some of the services that we provide to the Congress. We assist the Congress by helping them develop budget plan and also helping to assist them in seeking to stay within that plan. Assessing the impact of federal mandates considering issues related to the budget and economic policy. So how do we help the Congress

develop a plan. The other product that work really known for I'd say on the hill and elsewhere are the baseline for budget that we produce several times a year. We call it a baseline it incorporates the assumption that current law generally remains unchanged. The idea it serves as a benchmark for lawmakers what underlies our budget projections are economic projections. So we also produce proposals for the budget being familiar with the calendar year and earlier in the year the president will put forward a budget for that period of time without a time to analyze it during a big dive and another way we help the Congress is by estimating budgetary effects and legislative options. Mini these estimates are informal, before lawmakers introduced legislation there's a lot of different budgetary effects for the budget committee which is the CBO oversight. The use this information to develop the positive resolution which is a roadmap. And how we help Congress stay within its plan as we prepare cost estimates. I refer to those earlier for each bill improved by a committee. Oftentimes I think folks will think we produce a cost estimate on every bill introduced but that's not necessarily the case. Were required to do it for every bill approved by a committee for every stage of the process. Those formal cost estimates are those that are statutorily required primarily. And those again guide and inform lawmakers on whether this legislation they are considering would either worsen or improve the deficit. We provide preliminary analysis when different parts of a legislative process typically before so they can try to get a sense of how potential legislation impacts on the deficit and we also track those options. Are key characteristics which are near and dear to my heart are that often times you'll often hear CBO has released this estimate and this is it. This is the final word. So we actually don't have any enforcement power. It's really up to policymakers to decide if they are willing to consider the estimate produced for the analysis for projections if it's really up to them. We are independent our program is separate we are working for the majority and the minority and as I mentioned earlier the directors appointed by both houses of Congress. So we are nonpolitical nonpartisan bylaw providing objective analysis. We are transparent it's been a key tone at the agency since its founding. And in recent years we've done even more to become more transparent to explain more about our methods and how we do our work. Explaining the basis of our finding and editing are messages on the website. Our work reflects our objectives impartial and nonpartisan analytical assessments and often times we get a lot of questions from other folks around the world in parliamentary budget offices who are seeking to emulate CBO to be a nonpartisan institution. How is it that you do your work and what your assessments based on. There is actually a lot of ungrateful and a lot of smart folks in the CVO who are experts in every aspect of the budget and one aspect key assessment is a detailed understanding of federal programs in the tax code. Were always analyzing data reported by the government physical agency in private groups and we consult with a worldwide array of people outside for experts in academia, think tanks and groups and private sector for other government agencies. We also have panels of economic advisors.'s got a panel of poor health advisors and we consult with these people a few times a year as well. So that's talk about how were actually structured and what our goals are in mission. I thought it run through some of our products. Some of you might be more familiar than others depending on the request that you might get from folks. I do get requests from some of you around the country. We do provide printed copies of our work for free so I encourage you to ask questions are happy to answer them. Were certainly happy products include the budget and forecast in the ten-year period of using the budget forecast process. Our January report that were working on soon here is really

our flagship product that has a 10 year projections and economic projections there updated a few times a year in these products in particular. Along with the cost estimates that were really known for. Our long-term budget projections that span 30 years. We've actually just released those projections and those even come out further and since we've talked about this, really on a continuous basis. We can look at the economic facts of it. It's been enacted and we also do an array for a variety of programs all by request. We typically produce about 750 formal cost estimates that are all available on our website we fulfill thousands of request for technical assistance from community members and legislation and formally introduced staying in close contact with members on a day-to-day basis and staff. Republish about 70 reports and testimonies and working papers again all of this in this analysis the public proposals are available in the website. I want to talk about how we communicate as an agency and how we've gone from additional basis and essentially how we've really taken into account the changing way that people are consuming information and proud of the ways that we've made her work easier this process has been one that involves seeking feedback during surveys. Being mindful to the shift that you all are aware of. Users relying on mobile devices and smaller devices basically to get information. Primary thing for us as we communicate in any platform, we provide information and it's clearly a formal journalist is it's near and dear to my heart bylaw were getting the committees to the Congress. We can release this directly we work hard. I've talked to reporters to make sure our work is pertained accurately. Basically reporters and others can get our work when they need it. It's not really helpful if it's not available and they can find it when they are looking for it so it's important for us as an agency we work for the Congress they work for the people, I think for me with my roots in journalism, I'm always thinking about how are people on the hill getting their information we are hoping it's directly from us but if it's from news reports about our work then we have to make sure that those reporters and others who are writing about this, are able to access our work and reporting and what we produce accurately. That's very important to me. So what we have done this implemented a number of significant innovations enhancing the online presentation and accessibility of our work. I think some of you might be interested in these areas. I will highlight some researches on my website that I hope will be of interest to you. So, some of the examples that I wanted to go through our, we just started and January. It's really been the process that took some time for us to get off the ground but we are now producing fully digital versions of all of our reports so they are all in HTML along with PDF versions. These reports as I've talked about earlier about the trends basically and how in general information is being consumed increasingly. These reports are now easier to be consumed on mobile devices and that's an increasing share of our website traffic. So being responsive to that. And anything else allshare is everything we do we have metrics where look at how our work is being used and utilized and in it we have seen actual from January that producing fully digital versions from our work are being accessed even more. Much more than the PDF version so for us it was a nice affirmation that this was a good investment this is something we sought to do and we've also published interactive graphics that we started in January. Made a decision to publish with these major reports and as many of our reports as we can along with them just again to get the key takeaways communicated more quickly and as we all know especially in this time there's competed demands for our attention and our focus so especially lawmakers we are pulled in a lot of different directions we basically just want to make our work easier to digest and to find

and to use so we've actually found that being very helpful we've done a number of standalone interactive products on a variety of topics so that lawmakers and Hill staff and others can basically input information and come up with various options that we like to come up with those options so what with the option B. That's another innovation we are proud of. We've also really been in an area of focusing attention not surprisingly, it's kind of the bread and butter of what we do to estimate how much proposals would cost. We've launched enhancements to make those estimates easier to find and search and we have been in the process engaging with outside groups and particularly interested in focusing on transparency and also focusing with those on the hill and how they use our website what they are most interested in. One particular area of interest was predictable URL. It's basically having making it easier putting a bill number in and not having to go search for it on the website or do any real search of any kind you just add in the number and we also added, this is also a request for people from the hill and outside groups. Adding new search filters. Now you can go in and search by tenure totals for track spending revenue and deficits and you can still search by keyword and you can get more information about it. Also estimates in XML with got language which we also understood looking to see what further innovations we can make in this area there is a group called the boat data task force which includes some support agencies the Congress so there's structured data as a focus of this group and we just joined in the last year. We are excited to see other innovations we can do to help the Congress. And focusing on this which is what I'm particularly proud of. Creating a new page this past year on our 45th anniversary dedicated to our founding director Alice Midland. She passed away a year before a current director started it was early last year that she passed away so this is really our first anniversary without her. We wanted to honor her legacy and always be reminded of her efforts and her guidance which we still followed today so it's really quite a lovely section of our website we are grateful that this is on. So the other thing I wanted to spend a little bit of time on was again this is what I like to think is that CDL kind of like I am we have works in progress and we acknowledge constantly being in a state is asking for feedback being open to feedback being mindful to how we can do it better. Over time we've really incorporated feedback about what people on the hill want we developed these one-stop shop pages really to make it easier for people on the hill and power users to find this information more quickly. I thought I would just run through some of these pages we thought they might be good resource to share with all of you so the first one is our major recurring reports page. It essentially highlights reports and this drops where you can go down to the month and year I don't have a lot of that visible. You can go to month and year and essentially it goes back, what people find it helpful about this is they can go to that page and keep it bookmarked for the newest version to go there and find it. That's something that's been useful. Another page that's been popular is our budget and economic data page. We continue to add and innovate on this page but we got a lot of feedback that people just wanted a spreadsheet with numbers, and so what we ended up doing was basically the bulk of this page. If I were to go down on the website to show you these spreadsheets have our projections and we just kept getting feedback we just wanted numbers so we tried to be responsive here and essentially create a page of spreadsheets where you can have all but numbers to your hearts delight we were trying to be responsive so that's a popular page. Another page that people from the hill and staff, particularly those are appreciating page details about selection programs when we do our budget projections we do a drill down of all these different subject

areas and programs and do tenure budget programs for each range. You can see some of topics listed and there's a lot of website traffic that goes to people who are just looking for specific programs so we decided to create a section just for that. Options there's a lot of interest among the hill staff and lawmakers about what are various options so we wanted to group our reports with those options and also referred to on this page our budget options. A product we produce every few years and in a couple of months were going to be producing our next volume that we usually do before the start of the next Congress which will be January and we've also made that digital so it was a process over a few years so we now have all those options available on a digital basis which again makes it easier than someone trying to get into a PDF and trying to search for that page and having to print out a document. So it's also been very well received and leaf mentioned over the transparency a key tendency of the agency to develop a page that was developed to that and provide examples I will run through what's not visible here just to show you the page but we can this page out into several different sections so that whenever we release a piece of work we categorize it and sort of keep track about it on this page, because essentially all our efforts, I will highlight quickly here we talk about our transparency efforts having three principal goals to propel out a thorough understanding of our analysis if you go to this page you can question for the record to follow up it's all made possible. We've got a lot of information and of course were happy to answer questions to. There's supplemental data. We analyze the accuracy of the estimates and often going through saying how did we do how do they compare to others. Another section is comparing her current estimates to the previous ones. So characterizing uncertainty surrounding estimates, visualizing data and conducting outreach. As you might see that as a reference to a podcast there's been some experimenting with multimedia which is also a fun experiment for us to do. It's also on that page. Lastly we developed we as I mentioned developed interactive graphics that go along with report releases but we also have standalone graphics. This one we just released is an interactive workbook. It essentially allows you to find out how revenue and outlays might differ and basically you can put in a specific value and find out how that affects net interest cost and how it affects the deficits. It truly is to be in house now we are sharing it. So, that's a run through. Just again some of the ways we've -- to be mindful about that and to be providing that. The last part of my presentation but I want to talk about 30 minutes or so, talking about a little bit about what kind of approaches we've taken in assisting Congress in these crisis times. I'm sure like a lot of you, we've been working from home since basically mid-March. So this is certainly the most sustained time. There might be times in the past for different reasons working from home for different smaller shorter periods. For different issues that might come up. It's certainly the most sustained time that we have been working on remotely. The crisis time, what I want to share were some ways that we get to these purchases that we've taken that have deftly been outside of our standard practice so one thing that became clear to us the first item on the list is the release of budget economic analysis in shorter format. I talked about earlier in the presentation about her tenure budget projections. What became clear when the pandemic started was of course the intense demand for real-time information. I actually hope at some point our macroeconomic analysis division folks get some kind of timeout pick they were continuously updating their models in projections. We ended up in April being remote in March. We produced our first blog Poche which was preliminary, in May we produced the interim economic projections in the blog post form. In July we actually did something we've

never done before which is separating the economic projections from the budget to get them out earlier. We release them in July and release the budget projection it's usually done in September. Essentially what's important there to note is being able to adapt to be as responsible to those whom we serve. That was something that we've done that I'm grateful we were able to do as an agency. Going forward were thinking about that to. How it was helpful and useful. Highlighting our director participated in a virtual briefing for lawmakers to testify before the Congress both in person and virtually more recently about long-term projections. I think being mindful as we all know we are in this virtual world and being nimble and open to doing things differently and as you know in your experience, when we typically are in the past office building not too far from the capital we typically have a lot of these exchanges it's incumbent upon us to be open to doing things differently and for members and staff are where they are that's something that we did quite a lot of, in the coming months as the pandemic continues, remaining with us. Pointing out that as I get to the close of the presentation. In terms of making our work easier to find we developed a new page our projections of the economy in the budget did get quite a lot of attention so we wanted to make sure the people were able to find that work very easily. We developed a new page on our homepage. Really lastly we really just Communicating with the Congress about the changes within our schedule. As has been the case with so many agencies and human beings and families. Our schedules have all gotten up and advised Covid-19 so we wanted to keep lawmakers informed for the legislation it's very complex is a very complex involved estimate that our folks did work very intensely to analyze. We kept them informed as quickly as we could so those are just a few. Approaches as to how we do our work. Certainly were doing it at home we never thought we would be doing that but basically working with the Congress in producing impartial objective information, I think like we said before were always mindful and being open to do processes again, thanking you for having me. As I said in my last slide, I welcome your questions and feedback I really hope you consider this to be a resource and that want to be as responsive as we can and helpful. So with that thanks for your time and attention thanks and happy to help you answer questions.

We've got a few questions if there's more please enter them into the chat box for all participants. Our first question.

Are relatively new to this space, we do this we mulled over getting back to the plan. Were always trying to think about what is a sustainable process wise for us to not just do, really kind of asking ourselves starting from scratch, adopting a certain process or way to do it it's something we eternally could sustain and it's something that more more people could learn to do. It's an easier process for us but a great question I will take back to consider whether or not it's accessible over the time. For timing purposes as you all know, we do archive a copy of our website under NARA. It's with every Congress so I imagine in that format it's necessary.

As librarians we need to have the information preserved within time contacts. Can interactive tools to save results as a PDF sentence used to do?

Yes there are different and I'm happy, who arrested question, happy if you want to contact me. There's different exports for the products depending on which when they are. Different options and I've got to remember there's different ways you can export the materials. I'm happy to help you off-line if you'd like to reach out.

If you've got more questions you can always reach out and I just wanted to thank Deborah for today's wonderful presentation. Thank you to our audience for participating in our virtual conference this concludes today's events and we look forward to seeing you in our program tomorrow. Thank you and have a wonderful evening. [Event concluded]