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Budget 101

An Overview of the Appropriations Process

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>> SLIDE 2: Today's Agenda

Agenda

- Welcome
- Brief Overview of the Appropriations Process
- What is an Appropriation
- Effective Appropriations Advocacy
- Questions

>> SLIDE 3: Appropriations Process

Step 1: Budget Requests

- The Office of Management and Budget (OMB) provides guidelines to federal agencies for developing their budget requests for the coming fiscal year. The OMB reviews the agencies' funding requests and after feedback from the agencies creates a draft of the budget.

Step 2: Final Budget

- The OMB sends to the President the final budget, which includes information on the condition of the Treasury for the last completed fiscal year and the estimated condition at the end of the current fiscal year. The budget also may include other budgetary publications that have been issued during the fiscal year, and other related and supporting documents pertaining to the budget.

Step 3: Submits Budget

- In February, the President submits his budget to Congress. The President's Budget is just a proposal detailing how he would like to divvy up federal revenue for the next fiscal year. The Federal fiscal year runs October through September.
- Source: <https://guides.osu.edu/c.php?g=833016&p=5947898>

>> SLIDE 4: Appropriations Process

Step 4: Create and Pass Budget Resolutions

- The House and Senate Committees on the Budget take the President's Budget and create budget resolutions. These resolutions set spending levels for federal agencies, etc. After each passes their versions of the budget resolutions, a joint committee irones out any differences between the two versions and the revised budget resolution is sent to Congress to be voted on.

Step 5: Create Appropriations Bills

- Working within the spending limits set in the budget resolutions, the House and Senate Appropriations subcommittees determine the precise level of funding for the coming fiscal year. The resulting bill is voted and passed in the subcommittee, then the full Appropriations Committee, and then goes to full House or Senate to be voted on.

>> SLIDE 5: Appropriations Process

Step 6: Vote on Appropriations Bills

- The full House and Senate vote on their own appropriations bills from their respective Appropriations Committee. After passing their versions, if there are any differences, a conference committee is appointed to iron them out and the revised bill is sent back to the House and Senate to be voted on. If passed, it is sent to the President.

Step 7: Signs Each Appropriations Bill and the Budget Becomes Law

- Only after the President signs the Appropriations Bill does it become law. When all the Appropriations Bills are signed, the budgeting process for the year is complete, and the federal government is funded for the next fiscal year.

>> SLIDE 6: What is an Appropriation?

- An appropriation is Law of Congress that provides an agency with budget authority. An appropriation allows the agency to incur obligations and to make payments from the U.S. Treasury for specified purposes. Appropriations are definite (a specific sum of money) or indefinite (an amount for "such sums as may be necessary")
- For Example – The Rehab Act provides Legislative Authority for the appropriations to fund the Independent Living Program

>> SLIDE 7: Appropriations Committees

- The House and Senate both have appropriations committees, and through their 12 subcommittees, they hold hearings to examine the budget requests and needs of federal spending programs.
- The House and Senate then produce their own appropriations bills to fund the federal government. These bills are "marked up" (amended as needed) and approved by the appropriations committees.

>> SLIDE 8: Line Items vs. Congressionally Directed Spending

- Line Item – specific program within the federal budget inserted by the Appropriations Committees in Committee Reports.
- Congressionally Directed Spending – also known as earmarks. Hyper-local, direct grant awards specifically requested by members of Congress to benefit specific projects or organizations in their state or district.

>> SLIDE 9: Line Item Example

- Hypothetical example of a Line Item: disability organizations seek specific funding and instructions for the CDC to study Long COVID. These instructions force the CDC to use the money provided by Congress for the specific things Congress asks them to use it for.
- Another Line item example is the funding set aside for the Independent Living Program within ACL's budget

>> SLIDE 10: Congressionally Directed Spending Example

- Example of Congressionally Directed Spending: Lehigh Valley CIL received \$150,000 in Fiscal Year 2024 for supportive services for individuals with disabilities. This funding was specifically requested by one of their two U.S. Senators, Senator Bob Casey of Pennsylvania.
- Each member of Congress has the ability to advocate for a limited number of “earmarks”.

>> SLIDE 11: Appropriations Forms

- Many Congressional offices have appropriations forms available on their websites. These forms may become available as early as February each year and may have a deadline for submission in March or April.
- Line item (programmatic) requests and Congressionally directed spending requests are usually submitted through different, separate forms.

>> SLIDE 12: How do Congressional Offices Make Decisions on Appropriations Requests?

Each Congressional office is different, but they all use some of the following to decide which requests to support:

- Past support of the specific funding request
- Emails and phone calls received in support of the funding request
- Meetings (in-person or virtual) between advocates and Congressional staff in support of the funding request
- Appropriations form submissions through their website

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Effective Appropriations Advocacy

>> SLIDE 14: Coalition Building

- Coalition Building is the action of bringing different groups together to achieve a common goal.
- Examples of Who Can be Part of a Coalition?
 - Stakeholder organizations
 - Individual Leaders
 - Policy Makers
 - Businesses

>> SLIDE 15: Identifying Champions

- Try to get champions for your request in both the House and the Senate.
- If a House member or a Senator led a sign-on letter on the issue last year, they are first in line to lead again this year. Approach them first.
- Never assume that a Congressional office will or won't support your request. Always reach out to them.

>> SLIDE 16: Sign-on Letters

- The most effective way for advocates to demonstrate support for a funding request is through House and Senate sign-on letters – having Congressional offices sign onto joint letters with their colleagues in support of that request, which are then submitted to the relevant appropriations subcommittees.
- The more support registered in the form of signatures on these letters, the better.

>> SLIDE 17: Meeting with Offices

Setting up Meetings with Congressional Staff

- You can set up a meeting with congressional staff either in DC or at their in state/district offices
- Search online using the [Find My Representative](#) tool or the [Search for a Senator](#) tool to find your members' websites, which will include their Washington, D.C. and district office locations and phone numbers.
- The easiest way to set up a meeting is to call the office and ask for a meeting with the relevant staff of the issue area you would like to discuss

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Questions?