



# HERITAGE AND ARTS FISCAL NOTE AND BUILDING BLOCK FOLLOW-UP

BUSINESS, ECONOMIC DEVELOPMENT AND LABOR APPROPRIATIONS SUBCOMMITTEE  
STAFF: ANDREA WILKO

BUDGET BRIEF

## **SUMMARY**

This report follows-up on select fiscal notes and budget actions from past legislative sessions. For each item, the report includes a stop light (red, yellow, green) for implementation status, budget accuracy, and, where available, performance. It details original cost and/or revenue estimates, legislative appropriations, and actual experience. It is intended to create a feed-back loop that improves future estimates and initiatives.

# FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

## 2014 G.S. Art Acquisition

Committee: BEDL

Analyst: Andrea Wilko

| Cost Estimate | Revenue Estimate | Original Approp. | Changes | Subtotal | Experienced | Difference |
|---------------|------------------|------------------|---------|----------|-------------|------------|
| \$60,000      | \$0              | \$60,000         | \$0     | \$60,000 | \$60,000    | \$0        |

### Explanation

The Legislature provided funding to increase new art work acquisitions for the State Fine Art Collection.

### Implementation

Funds were used to purchase 12 new artworks for the State Fine Art Collection by the following Utah Artists: Peter Everett, Andrew Abramov, Levi Jackson, Lenka Konopasek Taylor, David W. Meikle, Laura G. Zundel, Andrea Jenson, George Mark England, Fisalis Buehler, John Bell, Oonju Chun, and Justin Wheatley.

### Accuracy

Fund were used as intended, to expand the State Fine Art Collection.

### Performance

Funds were used to purchase 12 new artworks for the State Fine Art Collection.

# FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

## 2014 G.S. Symphony in the Park - Taylorsville Dayzz

Committee: BEDL

Analyst: Andrea Wilko

| Cost Estimate | Revenue Estimate | Original Approp. | Changes | Subtotal | Experienced | Difference |
|---------------|------------------|------------------|---------|----------|-------------|------------|
| \$20,000      | \$0              | \$20,000         | \$0     | \$20,000 | \$20,000    | \$0        |

### Explanation

Funding was allocated to provide free symphony concerts to the general public, many of whom would not have a chance to see the symphony in a concert hall. The event also provides a venue for local talent to showcase their abilities to the public.

### Implementation

Funds were disbursed for the event which takes place in June. Funds paid for staging, lights, sound, equipment rental, porta-johns and security.

### Accuracy

Funds were used as identified in the contract to pay for staging, lights, sound, equipment rental, porta-johns and security.

### Performance

No performance data available.

# FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

## 2014 G.S. Museum of Contemporary Art

Committee: BEDL

Analyst: Andrea Wilko

| Cost Estimate | Revenue Estimate | Original Approp. | Changes | Subtotal | Experienced | Difference |
|---------------|------------------|------------------|---------|----------|-------------|------------|
| \$50,000      | \$0              | \$50,000         | \$0     | \$50,000 | \$50,000    | \$0        |

### Explanation

Funding was used to purchase a new Utah Museum of Contemporary Art (UMOCA) Art Truck. The UMOCA Art Truck brings site-specific contemporary art crossed with ideas from Utah's Core Curriculum directly to Utah's schools and community events. By purchasing a new, more reliable Art Truck, UMOCA intends to expand this program to rural segments of the state.

### Implementation

The truck was purchased upon receiving 4th quarter payment.

### Accuracy

Funds were fully expended purchasing the new truck.

### Performance

UMOCA's Art Truck is free and available for use by Utah's schools and public events. The new Truck allows UMOCA to serve more schools, so that interaction with current mediums, ideas, and issues reach even the most rural of populations. Currently, the Art Truck can travel along the Wasatch Front, to Summit County, Tooele County, Salt Lake County, Utah County, and Davis County.

# FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

## 2014 G.S. Museum Grants

Committee: BEDL

Analyst: Andrea Wilko

| Cost Estimate | Revenue Estimate | Original Approp. | Changes | Subtotal  | Experienced | Difference |
|---------------|------------------|------------------|---------|-----------|-------------|------------|
| \$125,000     | \$0              | \$125,000        | \$0     | \$125,000 | \$125,000   | \$0        |

### Explanation

The Legislature provided \$125,000 to the Museum Grant line item to increase competitive grant funding available to museums throughout the state.

### Implementation

The Division of Arts and Museums awarded 56 grants to museums across 41 cities/towns throughout the state in FY 2015.

### Accuracy

Funds were used as defined in contracts to improve and enhance collections, upgrade facilities, and expand access to museums throughout the state.

### Performance

The Division of Arts and Museums awarded 56 grants to museums across the state in FY15.

# FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

## 2014 G.S. Utah Symphony - 5 Park Tours

Committee: BEDL

Analyst: Andrea Wilko

| Cost Estimate | Revenue Estimate | Original Approp. | Changes | Subtotal  | Experienced | Difference |
|---------------|------------------|------------------|---------|-----------|-------------|------------|
| \$250,000     | \$0              | \$250,000        | \$0     | \$250,000 | \$250,000   | \$0        |

### Explanation

This State funding directly supported the Utah Symphony Mighty 5 Tour to all five of Utah's National Parks August 11 -17, 2014. Funding was used to kickoff to the 75th Anniversary of the Utah Symphony in 2015 -16, and promoted Utah's National Parks in preparation for the Centennial celebration of the National Park System in 2016.

### Implementation

Utah Symphony performed four free full orchestra evening concerts in Teasdale, Moab, Bryce, and Springdale, UT. During the days the Utah Symphony held free chamber performances featuring the guest artist ensemble, Aspen Winds, paired with educational activities in each of the National Parks Visitor's Centers at Capitol Reef, Arches, Canyonlands, Bryce and Zion. The Symphony performed evening chamber concerts featuring Utah Symphony musicians at Dead Horse Point State Park (outside at the point) and in the Arches Visitor Center auditorium.

The Symphony distributed a total of 6962 tickets across Utah leading up to the Tour. In addition to their website and Salt Lake-based ticket office, they utilized regional Zions Bank branches, grocery stores and other community locations as ticket distribution centers. Tickets were distributed to 19 states across the nation.

### Accuracy

All of the funds provided by the State were used as seed money for the project and expended on direct expenses related to tour. Government funding specifically supported Utah Symphony Orchestra musician expenses, all marketing expenses and a portion of Maestro Thierry Fischer's expenses. Additional funding came from private donors: The George S. and Dolores Doré Eccles Foundation, Sorenson Legacy Foundation, Chevron, O.C. Tanner, Zions Bank, and Questar.

### Performance

From 7000+ total tickets distributed, approximately 5,590 total audience members from local citizens to tourists from around the world came to the concerts. The concerts and educational activities became a centerpiece for community involvement and unity. For example, Wayne County utilized the Capitol Reef concert at Teasdale Community Park as the kickoff for their County Fair.

## Appendix A - Guidelines for Scoring Follow-ups

### Fiscal Note Building Block Follow-Up Report

The Analyst follows up on bills and building blocks from two sessions ago.

- **Item Explanation**  
What the appropriation is supposed to do. For bills the explanation is the fiscal note
- **Implementation**  
Is the item being implemented in a timely manner?
- **Accuracy**  
Was the fiscal note accurate? Both the Analyst and the agency are rated.
- **Performance Measures**  
Shown and evaluated when appropriate.
- **Follow the Money**  
The report traces funding from the original request to the remaining balance.

### Red - Yellow - Green Guidelines

We point out problems, potential trouble, and things going as expected with traffic light colors.

#### *One Size Does Not Fit All*

Early on, we found that what was reasonable for revenue estimates is unreasonable for ordinary bills and building blocks. Our guidelines are less stringent when an agency is asked to do something new and different than their usual fare.

#### *\$10,000 Rule*

The temptation to manage a fiscal note is so great that we give an automatic Yellow to any bill with a fiscal note near \$10,000.

#### *The Director's Exception*

The Director may draw your attention to any bill or building block with a yellow if the item needs your attention.

### Current Rules

#### *Accuracy of Familiar Programs / Processes*

-  Green - Within 5% of estimate or variances less than \$10,000.
-  Yellow - Greater than 5% but less than or equal to 10% of estimate and more than \$10,000.
-  Red - Greater than 10% of estimate and more than \$10,000.

#### *Accuracy of Unfamiliar Programs / Processes*

-  Green - Within 10% of estimate or variances less than \$10,000.
-  Yellow - Greater than 10% but less than or equal to 20% of estimate and more than \$10,000.
-  Red - Greater than 20% of estimate and more than \$10,000.

#### *Accuracy of Revenue Bills*

-  Green - Within the estimates margin of error.
-  Yellow - Greater than margin of error but less than two times margin of error.
-  Red - Greater than two times margin of error.

#### *Implementation*

-  Green - Implemented within the first month of the bill's effective date. The definition of implemented will vary according to the difficulty of the bill's task. Tasks that are too large to be implemented in the first month can be considered implemented if the agency has a reasonable plan and they are on schedule.
-  Yellow - Implemented after the first month but before the fourth month of the bill's effective date.
-  Red - Implemented after three months of the bill's effective date.

#### *Performance Measures*

The Analyst will decide if performance measures are appropriate and will use the "Implementation" guidelines. The Analyst will evaluate the agency's performance measures and recommend alternate measures when necessary.