



Indian Health Service Tribal Budget Consultation Process & FY 2025 Area Instructions Overview

Office of Finance & Accounting- Division of Budget Formulation

October 20, 2022

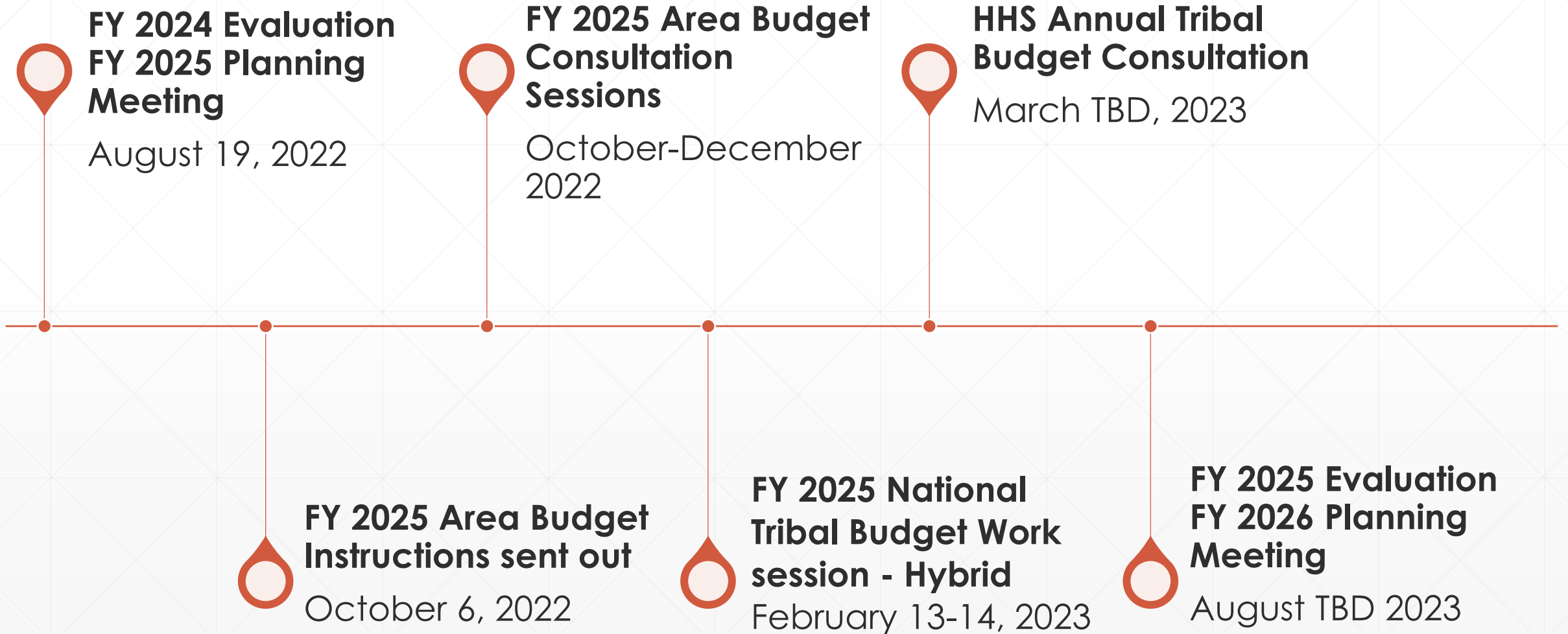
Overview

The annual budget request of the Indian Health Service is the result of the budget formulation and consultation process that involves **IHS, Tribal and Urban Indian Health programs**.

- IHS Areas should actively solicit the participation of Tribes, Tribal organizations, and Urban Indian Organizations in seeking input into the Area Budget Formulation activities.
- Tribal Priorities identified in the consultation process are instrumental in creating the annual IHS budget justifications.

IHS Tribal Consultation Policy: <https://www.ihs.gov/IHM/circulars/2006/tribal-consultation-policy/#12>

Timeline of Tribal Budget Consultation Activities (Fiscal Year 2025)



National Tribal Budget Formulation Workgroup

The National Tribal Budget Formulation Workgroup provides input and guidance to IHS in matters related to the budget formulation cycle and identifies national priorities, policies and budget recommendations.

- The Workgroup is comprised of two Tribal Representatives from each of the 12 Areas. **Tribal representatives must be an elected/appointed tribal official.**
 - Workgroup members are chosen annually at the individual Area budget Consultation sessions that occur October - December.
 - **The workgroup meets twice a year at the:**
 - Evaluation/Planning Meeting- Virtual (August 19, 2022)
 - National Tribal Budget Formulation Work Session-Hybrid (February 13-14, 2023)
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Tribal Budget Consultation Process: Step 1

Evaluation/Planning Meeting

(August)

This meeting is where workgroup members evaluate the previous budget process for FY 2024 and begin planning for the following budget cycle (FY 2025) that begins in August.

- **The planning portion of the meeting consists of:**
 - Drafting & Editing Area budget instructions and
 - Setting planning levels for the National Tribal budget recommendation
 - This meeting is typically attended by at least 1 tribal representative from the workgroup and technical team members.
 - The Virtual FY 2024 Evaluation and FY 2025 Planning Meeting was held on August 19, 2022.
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Tribal Budget Consultation Process: Step 2

Area Budget Instructions sent

(October 6, 2022)

Area Budget Instructions that were edited by the workgroup at the Evaluation/Planning meeting are sent to IHS Area budget teams and workgroup members.

Instructions are sent solely for information and preparation purposes, **all work on the worksheets and templates will be completed at the Area budget consultation sessions.**

- Area budget instructions and guidance typically consist of these deliverables:
 - National Budget worksheet
 - Budget justification template
 - Hot Issues template
 - Area report presentation template
 - Area tribal representatives template
- *Specific Information on each deliverable will be discussed in later slides.*

Tribal Budget Consultation Process: Step 3

Area Budget Consultation Sessions

(October-December)

Each IHS Area schedules a budget consultation session that involves working with IHS, Tribal and Urban stakeholders to develop a budget recommendation based on their local & national needs.

IHS Areas should actively solicit the participation of Tribes and Tribal organizations, and Urban Indian Organizations in seeking input into the Area Budget Formulation activities.

Area budget consultation activities typically include:

- Identifying priorities and completing the National Budget recommendation worksheet and associated templates for their Area.
- Choosing two tribal representatives and technical team members to represent their Area as a part of the National Tribal Budget Formulation Workgroup.
- Providing information on the IHS budget consultation process

Tribal Budget Consultation Process: Step 3

Area Budget Consultation Sessions

Tribal Representatives

Two Tribal representatives along with technical members are chosen at the Area Budget Consultation Sessions.

Tribal Representatives must be elected or appointed Tribal officials or a representative of a tribal official with a letter stating their appointment by the tribe.

- **Tribal Representative Roles and Responsibilities:**
 - Must be in communication with the IHS Area office prior to the National Tribal budget work session to review the National budget roll up and discuss how their area recommendations fit within the consolidated document.
 - Attend the National Tribal budget work session prepared to discuss/justify funding recommendations and be knowledgeable about health challenges in their area
 - Have the authority to negotiate specific budget lines on behalf of the tribes in their area so the workgroup can achieve an inclusive recommendation in a timely manner.
 - One representative must attend the Evaluation/Planning Meeting.
- **Technical support team** must prepare Area representatives for the National budget work session by explaining materials, checking materials for accuracy and providing information about the budget formulation process.

Tribal Budget Consultation Process: Step 4

National Tribal Budget Formulation Work Session

(February)

This is typically a 2-day annual meeting where the two tribal representatives from each area come together to review and consolidate all the Area's budget recommendations into a comprehensive set of national health priorities and budget recommendations, this years meetings will consist of the Hybrid approach.

■ **Work session activities include:**

- Tribal Caucus occurs where the tribal workgroup co- chairs are selected
- Discussion on determining priorities and budget recommendation
 - Decisions are made by consensus from workgroup members. Only the two tribal representatives that are a part of the workgroup are allowed to partake in voting.
- The workgroup will meet with IHS Director and other IHS leadership to discuss health priorities and budget recommendations
- At least one tribal representative from each Area along with technical team members will coordinate to complete follow-up work on the budget recommendation and testimony that will be presented.

Tribal Budget Consultation Process: Step 5

HHS Tribal Budget and Policy Consultation

(March/April)

This is an annual consultation session with tribes in regards to the HHS budget and has been conducted to give Indian Tribes and Tribal organizations the opportunity to present their Health and Human services budget priorities and recommendations to the Department.

- **Co-chairs will present the National Tribal Budget Recommendation that was decided upon at the National Tribal budget work session.**
- **Prior year National Tribal Budget Recommendation testimonies are available on the NIHB website:**
https://www.nihb.org/legislative/budget_formulation.php

What Happens after the National Tribal Budget Recommendation is submitted?

- **May- June:** IHS uses the Tribal recommendation and OMB/HHS guidelines to submit a budget request, referred to as the HHS Justification.
- **July-September:** After response from HHS, IHS along with HHS will submit a budget request to OMB (OMB Justification). OMB will then provide a response and IHS can accept or appeal.
- **December-February:** The decided upon budget submission is then used to develop the Congressional Justification (President's Budget) and is scheduled to be submitted to Congress on the 1st Monday of February.
- **March-September:** House and Senate subcommittees hear testimony from IHS, Tribal and Urban stakeholders. House and Senate Appropriation committees work out a final appropriation bill to send to the President to sign by September 30th.
 - If the bill is not signed by Sep 30th a Continuing Resolution (CR) may be enacted.

Current & Prior Year Budget Information

- **Congressional Justifications (President's Budget):**
<https://www.ihs.gov/budgetformulation/congressionaljustifications/>
 - **HHS website has IHS and other agency budget and budget documents:**
<https://www.hhs.gov/about/budget/index.html>
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FY 2025 Area Budget Instructions

Overview

The FY 2025 Area Budget Instructions are sent to IHS Area Budget Teams to distribute at the Area Budget consultation sessions taking place October-December 2022.

- **The instructions are completed by IHS/Tribal/Urban organizations together at the Area budget consultation sessions.**
 - **IHS Area budget teams are responsible for sending in completed instructions to IHS HQ by the designated due dates.**
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Area Instructions Timeline

Area Consultation meeting dates/locations are sent to IHS HQ

October – December 2022

Deliverables #2-#5 are sent to IHS HQ .

#2: Budget Narrative

#3: Hot Issues

#4: Area Tribal Representatives

#5: Area Report Presentations

January 6, 2023

FY 2025 National Tribal Budget Formulation Work Session - Virtual

February 13-14, 2023

December 9, 2022

Deliverable #1: National Budget Worksheet is sent to IHS HQ.

January 13, 2023

IHS HQ will send final rollup of the National Tribal budget recommendation to Area Tribal representatives and IHS Area budget teams.

Area Budget Instruction Deliverables

Deliverable #1: National Budget Worksheet

This is an excel worksheet to enter your Area's program increases by budget line item.

Per the decision of the National Tribal Budget Formulation Workgroup, the overall funding target and policy for FY 2025 will be a full funding mandatory budget submission, using \$54 billion as an estimate for full funding. This funding level includes the FY 2024 Full Funding proposal, plus increases in fixed costs and binding obligations

This approach has two key differences from our prior Tribal Budget Consultations:

1. A mandatory funding proposal, instead of a discretionary funding proposal, and
2. A continuance of the full funding budget policy from the FY 2024 Tribal Budget Recommendations.

A mandatory funding proposal provides the opportunity for Tribal Leaders to consider key policy changes that they would recommend to create a sustainable, long-term funding strategy for the agency. This means that each Area's tribal consultation can consider whether there should be any reallocations within the \$54 billion guidance level. If each Area's tribal consultations so choose, additional program increases beyond the \$54 billion guidance level can also be included.

Area Budget Instruction Deliverables

Deliverable #2: Budget Justification Narrative

This is a justification document that describes and supports the budget priorities that are reflected in the National budget Worksheet (Deliverable #1).

Suggested key points to include are:

- How the recommended budget increases should be allocated
 - Include any effects of previous year's increases and/or include data that highlights those effects
- Any linkage to the IHClA provisions, where applicable. Link:
- Any linkage to GPRA performance targets and outcomes

Area Budget Instruction Deliverables

Deliverable #3: Hot Issues

This is where each Area has the opportunity to highlight any hot issues (regardless if related to funding) that are unique to their area.

This year, per the recommendation of the National Tribal Budget Formulation Workgroup, the Hot Issues Template now includes a one page summary, as well as a lengthier section to discuss each Hot Topic in greater depth. The one-page summary will be included in the FY 2025 Budget Recommendations document, and the lengthier discussion of each Hot Topic will be included in the appendix.

- **Format:**

- **Issue:** Provide a brief description of issue
- **Background:** Include historical information or data that explains the issue in more detail
- **Recommendation:** Link to a recommended budget recommendation or provide action that needs to be taken to address the issue

Area Budget Instruction Deliverables

Deliverable #4: Area Tribal Representatives

The contact information of two Tribal representatives along with technical members that are chosen at the Area Budget Consultation Sessions are sent.

Tribal Representatives must be elected or appointed Tribal officials or a representative of a tribal official with a letter stating their appointment by the tribe.

■ **Tribal Representative Roles and Responsibilities:**

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Area Budget Instruction Deliverables

Deliverable #5: Area Report Presentations

This is a presentation that summarizes your Area's budget priorities and hot issues.

- **The workgroup decided that there will be no limit on the number of slides.**
- There will be an Area Report webinar held January 25-26, 2023. Each Area will present their report to a larger audience before the National Tribal Budget Work session; **Time limit will be 15 min.**
- **Optional template:**
 - **Summary of Service area and demographic information**
 - **Summary of Funding/Health priorities**
 - **Summary of Area Hot topics**
 - **Success stories**
- **You can find previous years Area reports on the IHS website:**
<https://www.ihs.gov/budgetformulation/meetings/area-tribal-budget-recommendations/>

Have Questions?

Please see/subscribe to the IHS Event calendar for webinar details:
<https://www.ihs.gov/ihscalendar/>

- **Webinar Dates:**

Tribal Budget Consultation Process - October 20, 2022.

Area Report Webinar Presentations - January 25-26, 2023.

- If you have further questions, please contact:

- **IHS-Office of Finance and Accounting, Division of Budget Formulation**

- **Phone:** 301-443-1270

- **Email:** IHSQBudgetformulation@ihs.gov

All Resource Links

IHS Tribal Budget Consultation

- **The IHS Tribal Budget Formulation webpage:** [Division Of Budget Formulation | Indian Health Service \(IHS\)](#)
- **National Tribal Budget Recommendations (prior years and current):**
https://www.nihb.org/legislative/budget_formulation.php
- **IHS Event Calendar:** <https://www.ihs.gov/ihscalendar/>

IHS Budget and Federal Budget Process Information

- **Congressional Justifications (President's Budget) posted:**
<https://www.ihs.gov/budgetformulation/congressionaljustifications/>
- **HHS website has the annual budget and budget in briefs from IHS and other agencies posted here:**
<https://www.hhs.gov/about/budget/index.html>