



Near-term Goals and Long-term Possibilities





Developing vision of the future



Input and conversations

Over the Last  
Year

Near-term  
Goals:

October 1, 2024

-

September 30,  
2026

STATEWIDE FINANCE

REVENUES

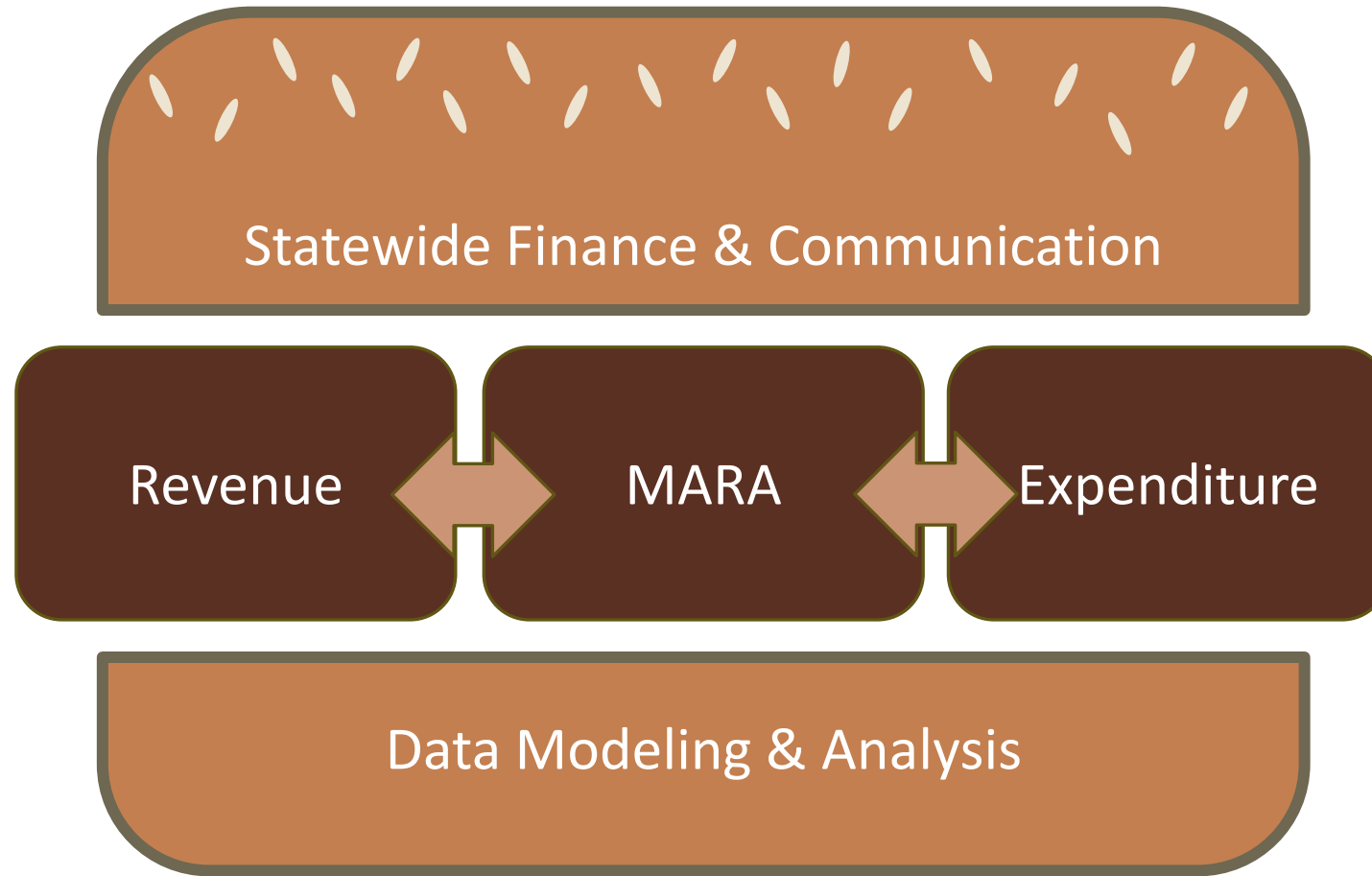
EXPENDITURES

MARA

DATA MODELING AND ANALYSIS

BRANCH-WIDE COORDINATION

# Legislative Fiscal Division Organization



Statewide  
Analysis and  
Communication  
Responsibilities

---

General fund and all fund broad  
analysis, including financial risk

---

Broad understanding of state finance  
by all legislators

---

Curating New Communication  
Products to Reach Broader Legislature

---

Website management

# Goal

Use new web tools to monitor and measure how legislators use our website to improve continuously and for 2027 session - report to the LFC annually

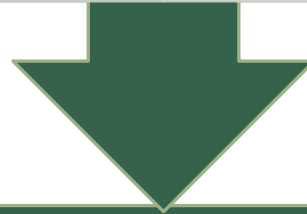
# Revenue Monitoring, Forecasting, and Reporting

Revenue Estimates and  
HJ 2 , the revenue  
estimating resolution

Monthly updates for  
RIC, quarterly reports  
for LFC

Outlook forecast

Fiscal Note revenue  
tracking



# Additional Research & Long-Term Revenue Stability

Legislative requests  
during session &  
interim

Analyze the evolving  
revenue landscape

MARA models &  
analysis

Risk Analysis

## Revenue Responsibilities

# Revenue Goals/Objectives

---

Online revenue dashboard for 2025 session



```
graph TD; A[Online revenue dashboard for 2025 session] --> B[GenTax data integrated into new data structure secured as needed  
– report % complete each LFC meeting, complete by July of 2026]; B --> C[Redesign and modernize behind the scenes data structure and calculations into new system]; C --> D[2027 session Redesign Revenue Estimate Volume II into web-based product];
```

GenTax data integrated into new data structure secured as needed  
– report % complete each LFC meeting, complete by July of 2026

Redesign and modernize behind the scenes data structure and calculations into new system

2027 session Redesign Revenue Estimate Volume II into web-based product



# Expenditure Responsibilities

---



Session/Interim staffing  
including planning and  
agendas



Budget and Expenditure  
Analysis for all  
legislators



Creation and  
amendments for all  
elements of HB 2



Interim Projects as  
directed from IBC or LFC  
members

## Expenditure Goal

Excellent staff guidance, communication, and assistance to Legislature in the budget development process during session requires well trained staff with experience. Currently the LFD has a higher proportion of new staff due to the new positions added.

- Refine a comprehensive program to train new staff by September 1, 2025 – present at the September 2025 LFC meeting
- Lower number of new analysts going into the 2027 session currently 6 of 13 expenditure analysts do not have session experience: goal of 3 or less new analysts

# MARA Responsibilities

---

MARA's statutory role is to study the "longterm future budget and revenue needs of the state" and to "create data sets and models for future analysis by the legislature" – this role extends beyond the LFD and appropriating committees

To be successful, the committee and its products need to be understood and hopefully utilized by all legislators and legislative staff

MARA is a venue for hearing from a broad array of national policy experts, with a goal of informing long-term policy optimization and the questions the legislature should ask – and the associated data to gather

MARA data team continues to add components of the MARA study with forecasts– extending long-term thinking to additional policy areas

MARA projects and staff expertise support the quantitative needs of other projects and partners, like the decennial school funding study

# MARA Goals – report to MARA

---

## Goal 1 – Engagement with the legislature

- Attendance at MARA meetings by legislators increases by 15% relative to the 2025 biennium
- Engagement with other interim committees (citations by, speaking to, or projects for) increases by 15% relative to the 2025 biennium

## Goal 2 – Continue to expand the depth and breadth of the MARA model

- Increase the number of modules within the MARA model to extend long-term thinking to additional policy areas – for example local government forecast
- Deepen the analysis of existing modules in response to legislative questions



# Data Modeling and Analysis Responsibilities

Support other areas of the division and the branch

Organize data to be nimble and well defined

Automation tools

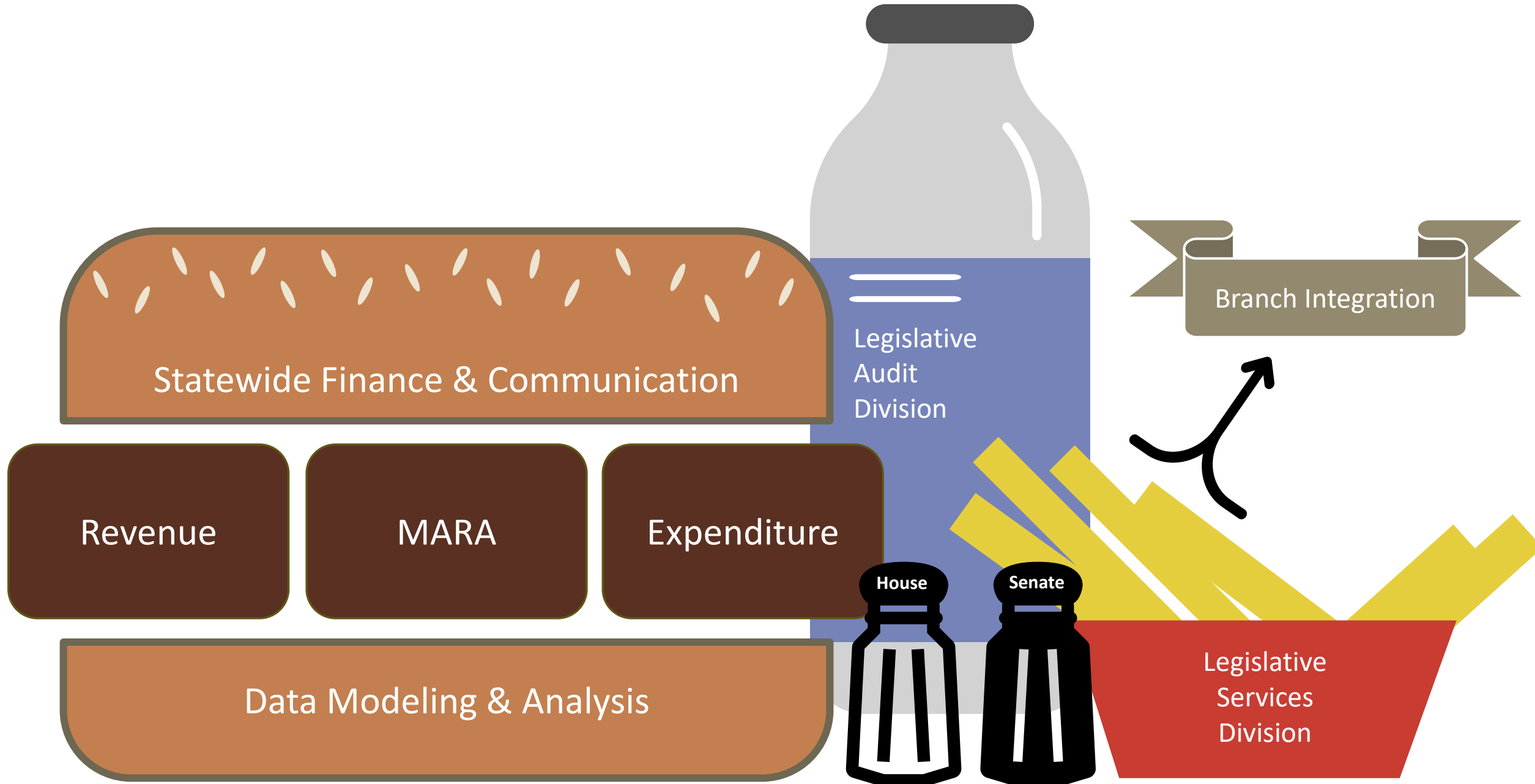
Data governance and interaction with other areas of state and local government

Model data and provide technical assistance to analysts to model data

Continue to improve the 20 year look forward

## Data Goal

Create a data management plan that incorporates data management best practices defined by DAMA-DMBOK by September 1, 2025 and review the plan with MARA



## Branch-wide Coordination Responsibilities

Collaboratively work with other G5 members to

1. Determine and communicate branch-wide needs for services
2. Advise the shared centralized services staff on priorities of the Branch
3. Develop and improve branch-wide policies and processes



# Branch Coordination Examples

---

Legislative Days

Orientation

Chair Training and  
Rules Committee

Lunch and Learns  
on Zoom

Budget Overview  
with new  
subcommittee  
members

January 2 and 3

Amy Carlson  
Director

Joe Triem  
Deputy

Quinn Holzer  
Assistant

Josh Poulette  
Lead Fiscal Policy

Nick VanBrown  
Assistant

Sam Schaefer  
Lead Revenue

Susie Lindsay  
Lead Analyst

Katie Guenther  
Lead Expenditure

- Capital Planner for Legislative Council
- Section A & E Oversight
- Section F
- Infrastructure policy

- Administration
- Section B
- Section C
- Section D

- Data management and automation
- Data Analysis Planning and Training
- Revenue Team
- Section E

- Statewide Analysis
- Division Communication

- Expenditure Team Planning and Training
- Section A





Near-term Goals and Long-term Possibilities



# Long-term Possibilities



Integrated data system  
that is nimble to  
answer a wide range of  
legislative questions

Branch-wide data  
excellence

State-wide data  
governance and  
data excellence



New Mexico Model

Relationship with  
Legislative Audit

Legistat process

Quarterly  
performance  
reporting