The Federal R&D Budget Process 101

Matt Hourihan
March 25, 2018
For the CASE Workshop
AAAS R&D Budget and Policy Program
http://www.aaas.org/rdprogram/rd-budget-and-policy-program
Timeline is 18 months or more from the start of agency planning to completion of appropriations and start of the fiscal year on October 1, however...
Congress hasn’t gotten appropriations finished on time since 1996
Agencies in the Budget Process

Executive Branch

- Agency process kicks off 18+ months in advance. Generally:
  - Developing strategic priorities, objectives (winter/early spring)
  - Then developing and iterating concrete, detailed program proposals and scenarios (spring/summer)
  - Often bottom-up in the details: small units → larger units → agency leadership/CFO

- Ingredients include:
  - Agency head and staff judgment
  - External input from advisory or review committees, workshops or meetings, NAS decadal surveys, Congress, etc.
  - Incrementalism: last year’s budget influences next year’s

Rough Timeframe: February-August
The White House in the Budget Process

Executive Branch

OMB = Office of Management and Budget
- Spring: Guidance memo to agencies
- Fall: Thorough, detailed review of agency budget submissions, followed by “passbacks” and appeals
- OMB’s job is to constrain spending

OSTP = Office of Science and Technology Policy
- Summer: joint memo with OMB outlining broad S&T priority areas for investment
- Advice (with PCAST) and coordination to President, agencies, OMB, NSTC on science investments and strategies

Review Timeframe: September-January

- High-level political, spending, or legislative priorities
- Negotiation with agencies
- Things must wrap in January
- This is all truncated in transition years
Composition of the Proposed FY 2020 Budget
Total Outlays = $4.7 trillion
(outlays in billions of dollars)

- Defense Discretionary: $662
- Nondefense Discretionary: $630
- Social Security: $1,102
- Medicare: $679
- Medicaid: $418
- Net Interest: $479
- Other Mandatory: $642
- [Defense R&D]: $64
- [Nondefense R&D]: $70
- Other: $642

Source: Budget of the United States Government FY 2020. Projected deficit is $1.1 trillion. © AAAS 2019
Total Requested R&D by Agency, FY 2020

budget authority in billions of dollars

- DOD, $67.7
- HHS (NIH), $33.7
- DOE, $14.7
- NASA, $11.3
- NSF, $5.7
- USDA, $2.5
- Commerce, $1.7
- All Other, $4.9

Total R&D = $142.2 billion (estimated budget authority)

Source: OMB R&D data and supplements, agency budget justifications, and other agency documents and data. R&D includes conduct of R&D and R&D facilities. © 2019 AAAS
The Budget Process at a Glance

Executive Branch

- White House
  - OMB
  - OSTP
- Agencies

Legislative Branch

- Budget Committees
- Appropriations Committees & Subcommittees
- Budget Resolution

- Congress has the **Power of the Purse**
- Does the President’s Budget even matter? Yes and no...
The Budget Resolution

- Established by the 1974 Congressional Budget and Impoundment Control Act
  - Intended to reassert, and broaden, legislative control over the budget
  - Also created the House and Senate budget committees, which write the Resolution

- Overall framework:
  - Revenue, deficit, and total spending targets
  - Typically includes programmatic recommendations
  - **Key for science spending**: discretionary spending limit to govern appropriations

- Isn’t law and can’t change law, but can set up reconciliation process (i.e. tax reform)

- Best seen as a **political document** as much as a governing document
  - Partly because it isn’t always adopted...

Rough Timeframe: March-April (LOL)
Federal S&T Spending Since FY 2010
Percent change from FY10 levels, constant dollars

*Includes OE, EERE, Fossil, Nuclear, Cybersecurity, ARPA-E.

Based on AAAS analyses of historical OMB, agency, and appropriations data. © 2018 AAAS
Enter the Appropriators

Executive Branch

Agencies

White House

OMB

OSTP

February Budget Request

Legislative Branch

Budget Committees

Appropriations Committees & Subcommittees

SPENDING BILLS (x12)

Rough Timeframe: May-September (LOL!!)
Discretionary Appropriations by Senate Subcommittee, FY 2019

budget authority in billions of dollars

- Defense, $675.0
- Labor/HHS, $181.2
- Commerce, Justice, Science, $63.0
- Energy & Water, $43.8
- Agriculture, $23.2
- Interior & Environment, $35.9
- Military Construction/VA, $98.0
- Transportation/HUD, $71.4
- Legislative Branch, $4.8
- Homeland Security, $55.2
- Financial Services, $23.7

Appropriations subject to spending caps only. Source: CBO data. © 2018 AAAS
Estimated R&D Appropriations by Senate Subcommittee, FY 2019

budget authority in billions of dollars

- Defense, $64.4
- Labor/HHS, $39.2
- Commerce, Justice, Science, $20.3
- Energy & Water, $18.3
- Agriculture, $2.9
- Interior & Environment, $2.0
- Military Construction/VA, $1.5
- Transportation/HUD, $1.1
- Homeland Security, $0.7

Estimates based on appropriations and agency data. © 2018 AAAS
From Budget to Appropriations

- Budget Resolution limits → Appropriations Committee Chairs → Subcommittees (302(b) limits)

- Information gathering:
  - Hearings with agencies
  - “Dear Colleagues,” Member Days, other input
  - Constituents, experts, lobbyists

- Subcommittee → Committee → Floor
  - Bills AND reports: Appropriations reports provide important guidance to agencies
  - Can be amended throughout, subject to 302(b) caps
  - Conference committees to resolve differences
  - Senate can sometimes moderate changes

- Appropriators and their choices
  - “All politics is local”
  - Personal legislator interest
  - Public interest
  - Ideology and party preferences
  - Key: Getting a bill that can actually pass (duh)
    - Incrementalism helps

FY 2019 House R&D Appropriations by Spending Bill
budget authority in billions of dollars

- Agriculture, $3.1
- Energy & Water, $18.4
- Interior and Environment, $2.0
- Commerce, Justice, Science, $20.4
- Labor, HHS, Education, $38.7
- Defense, $59.9

R&D includes concust of R&D and R&D facilities. © 2018 AAAS
## Energy & Water Subcommittee

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<tr>
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<th>House</th>
<th>Senate</th>
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<tbody>
<tr>
<td>Chair</td>
<td>Marcy Kaptur (D-OH)</td>
<td>Lamar Alexander (R-TN)</td>
</tr>
<tr>
<td>Ranking Member</td>
<td>Mike Simpson (R-ID)</td>
<td>Dianne Feinstein (D-CA)</td>
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</tbody>
</table>

- **Tradeoffs:** Balancing basic research and facilities, labs, tech portfolio, NNSA; also Army Corps, Bureau of Reclamation

- **NNSA funding has been a big priority of late**

- **Office of Science:** as basic science arm, generally supported in more bipartisan fashion
  - National labs help

- **Technology programs:** Congress tends to fund when funding is available, but can also be first on the chopping block
  - Some value innovation programs more than others
  - Regional energy politics and economics

### FY 2019 Senate E&W Composition

- **Budget Authority in billions of dollars**
  - **Bureau of Reclamation:** $1.5
  - **DOE Science:** $6.7
  - **DOE Energy Programs:** $6.6
  - **Army Corps:** $6.9
  - **NNSA:** $14.8
  - **Other:** $0.5

Based on Senate Committee report. © 2018 AAAS
Deep divisions over public health programs, education, labor...

But everybody loves NIH!
- We have now had multiple years of multibillion dollar increases
- Alzheimer’s, cancer, neuroscience, opioids among the big priorities lately
- Congress has so far protected NIH awardees from indirect cost changes, salary cap changes, etc

Other programs also have their supporters: public health and preparedness matter to lots of people (BioShield, BARDA, CDC, etc)
Commerce, Justice, Science Subcommittee

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<td>Jeanne Shaheen (D-NH)</td>
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- How to balance many different missions and public interest goals?
- NSF: many continue to value basic research
  - Universities, industry advocacy
  - Disciplinary fights?
- NASA: recent priority (J-O-B-S)
  - Again: labs and research centers help
  - Balancing the science portfolio?
- NOAA and NIST: some program elements more controversial than others
  - NOAA: climate research funding source of dispute; but legislators often support locally-relevant research funding, including Sea Grant
  - NIST: lab programs have been supported for competitiveness; industrial innovation / manufacturing programs a target

### FY 2019 House CJS Composition

- **NASA**, $21.5
- **NSF**, $8.2
- **Other Justice**, $21.8
- **Other Commerce**, $6.9
- **FBI**, $9.3
- **NOAA**, $5.2
- **Other**, $4.3

Based on House committee report. © 2018 AAAS
The Budget Process at a Glance

Executive Branch
- White House
  - OMB
  - OSTP
- Agencies

February Budget Request

Legislative Branch
- Budget Committees
- Appropriations Committees & Subcommittees
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- SPENDING BILLS (x12)
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Executive Branch

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Budget Committees
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SPENDING BILLS (x12)

February Budget Request

“Please don’t veto us!”
Other Legislative Appropriations Tools

- Continuing Resolutions: often necessary to avoid a shutdown October 1
  - ...with depressing regularity
  - Length can vary, from a day to a year
  - Uncertainty? New starts? Spending slowdowns?

- Omnibus (multi-bill package)
  - Or minibus, or megabus, or cromnibus, or...

- Supplementals
  - i.e. Zika, Ebola, Hurricanes
  - Also war funding
  - Not subject to spending caps
The Federal Budget Cycle

- Gov’t is usually working on 3 budgets at a time
- (though presidential transitions complicate things)
Where Are We Now?

- FY 2019 appropriations wrapped up in February, ~5 months late
  - Ultimately, decent numbers for science agencies, but another scramble to spend

- FY 2020 Budget Request just released
  - We estimate ~14% cut to basic + applied research

- Senate Budget Resolution out, appropriations to get rolling soon

- **BUT**: cap negotiations will have to happen this year, again
  - Current law requires a 10% drop in the caps, covering defense and nondefense
  - White House budget would side step the defense cap
  - Debt ceiling also looming

- Beyond the caps: what happens with the discretionary budget?

Congress

**Expect a ‘prolonged fight’ over spending caps**

Deal might not be reached until it’s too late to get next year’s spending bills done in time.

[Photo: Rep. John Yarmuth, D-Kentucky, leaves a House Democrats’ caucus meeting in the Capitol in January. (Bill Clark/CQ Roll Call file photo)]
Select Science & Tech Programs in FY 2019 Appropriations

Estimated percentage change from FY 2018 enacted omnibus, nominal dollars

<table>
<thead>
<tr>
<th>FY19 Request</th>
<th>House</th>
<th>Senate</th>
<th>Final Omnibus</th>
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<tr>
<td>DOD S&amp;T</td>
<td>-60%</td>
<td></td>
<td>-60%</td>
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<tr>
<td>DARPA</td>
<td>+15%</td>
<td>+15%</td>
<td>+15%</td>
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<tr>
<td>NIH</td>
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<td>NSF</td>
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<td>DOE Science</td>
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<td>DOE Tech**</td>
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<tr>
<td>USDA research programs***</td>
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<td>NIST programs*</td>
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<td>NASA</td>
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<td>NOAA Research</td>
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<td>DHS S&amp;T</td>
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<td>-40%</td>
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<td>US Geo Survey</td>
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<td>-45%</td>
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<tr>
<td>EPA S&amp;T*</td>
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*Flat in Senate and omnibus. **Includes renewables and efficiency, nuclear, fossil, grid research, cybersecurity, ARPA-E. | AAAS
Science & Tech Agencies in the Trump Administration's Budgets

Proposed year-over-year changes, nominal dollars

<table>
<thead>
<tr>
<th>Agency</th>
<th>FY18 Request</th>
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<td>-30%</td>
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<td>NOAA Research</td>
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*Includes renewables, efficiency, nuclear, fossil, grid research, cybersecurity, ARPA-E. | AAAS
Limits on Nondefense Spending

Billions of constant 2019 dollars

*Current caps last through 2021. Based on past and current budget resolutions, the Budget Control Act and subsequent legislation, and the FY20 request.
Limits on Nondefense Spending

Billions of constant 2019 dollars

*Current caps last through 2021. Based on past and current budget resolutions, the Budget Control Act and subsequent legislation, and the FY20 request.

© AAAS 2019
Limits on Nondefense Spending
Billions of constant 2019 dollars

Actual Caps w/ Congress Adjustments
Pre-Sequester Caps
Sequester Caps
Future Caps (Current Law)*

*Current caps last through 2021. Based on past and current budget resolutions, the Budget Control Act and subsequent legislation, and the FY20 request.
Limits on Nondefense Spending

Billions of constant 2019 dollars

- Actual Caps w/ Congress Adjustments
- Sequester Caps
- Pre-Sequester Caps
- Future Caps (Current Law)*
- President's FY 2020 Budget

*Current caps last through 2021. Based on past and current budget resolutions, the Budget Control Act and subsequent legislation, and the FY20 request.
Federal S&T Spending Since FY 2010

Percent change from FY10 levels, constant dollars

*Includes OE, EERE, Fossil, Nuclear, Cybersecurity, ARPA-E.

Based on AAAS analyses of historical OMB, agency, and appropriations data. © 2019 AAAS
Department of Energy Appropriations
(recommended percentage change from FY 2017 levels, nominal dollars. Mouse over for more info.)

SPENDING BILL: Energy & Water
STATUS: Not yet taken up by House or Senate
Last Updated: May 24, 2017

DOE Office of Science

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<td>Request</td>
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Federal R&D funding in Congress is allocated via several spending bills, authored by the appropriations subcommittees. Current AAAS estimates of R&D by select spending bill and subcommittee are shown below.

Last Updated: May 24, 2017

R&D in FY 2018 Budget and Appropriations

The President's budget request are displayed below. House and Senate estimates will be added once all are read. Mouse over for more info, or use the tabs above to view appropriations by agency or by Congressional subcommittee and spending bill.

Federal R&D Total Estimates*

R&D Budget by Decisionmaker*

Spending Bill Progress

Request | House | Senate | Final


House | Senate
For more info...

mhouriha@aaas.org
202-326-6607
http://www.aaas.org/rd
YOU ARE: The FY 2019 House-Senate CJS Conference Appointees

YOUR TASK: Negotiate a Commerce-Justice-Science appropriations bill that adequately funds priority programs while staying fiscally responsible. You need to create a conference report that can pass both chambers by majority vote and avoid a Presidential veto.

THE CHALLENGE: The Bipartisan Budget Act increased the spending limit to $1.2 trillion. House and Senate appropriators have stuck to this limit, but it's billions more than the White House wanted. The President is willing to go along with it, but he requires a few concessions before he's willing to sign the bill. And there is disagreement between the House and Senate as to which programs should be the priority. Time is limited and different people will have different ideas about what's most important to the nation, their colleagues, and their constituents.

THINGS TO THINK ABOUT:

1/ Divide your committee up with half representing the House and half the Senate. You might want to take ten minutes to determine your side's major priorities and bargaining chips.
2/ How will you decide on numbers? Consensus? Majority vote? Starting with the easy points first? You might want to appoint a chair to keep the committee moving.
3/ Appoint a secretary and keep track of your decisions in the FY 2019 Conference column as dollar amounts or as deltas (+ or -xx dollars from your base)
4/ What are you going to use as your baseline? President's Request? FY 2018 Enacted? The House figures? The Senate figures?
5/ Make sure you have a final total for your bill. Your spending limit (agreed upon by Congressional leadership) is $73.454 billion. Don't go over.

REPORT: At the end, some groups will be chosen to give a short summary of your bill. Treat this as an announcement you're making to the media, with Congress and constituents watching. Appoint a spokesperson to describe the highlights of your bill and justify the funding choices the committee made, and (off the record) share the challenges your committee faced.

| Commerce-Justice-Science Bill Appropriations (budget authority in millions of dollars) |
|---|---|---|---|---|---|
| Title I. Department of Commerce | | | | |
| International Trade Administration (ITA) | 482 | 440 | 480 | 488 |
| Bureau of Industry and Security (BIS) | 114 | 121 | 114 | 122 |
| Economic Development Administration (EDA) | 302 | 15 | 302 | 306 |
| Minority Business Development Agency | 39 | 10 | 40 | 39 |
| Economic and Statistical Analysis | 99 | 101 | 99 | 102 |
| Bureau of the Census | 2,814 | 3,801 | 4,800 | 3,821 |
| National Telecommunications and Information Administration (NTIA) | 40 | 34 | 40 | 40 |
| National Institute of Standards and Technology (NIST) | | | | |
| - Scientific and Technical Research and Services | 725 | 573 | 720 | 725 |
| - Industrial Technology Services | 155 | 15 | 145 | 155 |
| - Construction of research facilities | 319 | 40 | 120 | 158 |
| NIST Total | 1,199 | 629 | 985 | 1,038 |
| National Oceanic and Atmospheric Administration (NOAA) | | | | |
| - Operations, Research, and Facilities | 3,536 | 2,938 | 3,474 | 3,599 |
| | | | | |
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<td>National Telecommunications and Information Administration (NTIA)</td>
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<td>National Institute of Standards and Technology (NIST)</td>
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<tr>
<td>- Scientific and Technical Research and Services</td>
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<td>573</td>
<td>720</td>
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<tr>
<td>- Industrial Technology Services</td>
<td>155</td>
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<tr>
<td>- Construction of research facilities</td>
<td>319</td>
<td>40</td>
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<td>NIST Total</td>
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#### Commerce-Justice-Science Bill Appropriations (budget authority in millions of dollars)

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<thead>
<tr>
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<td>- Scientific and Technical Research and Services</td>
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Mission is to promote international trade, open foreign markets, ensure compliance with trade laws and agreements, and support U.S. commercial interests here and abroad.

Administers export control regime for dual-use technologies, oversees treaty compliance, and monitors defense and industrial technology base.

Funds regional economic development grants for distressed communities, including public works and technical assistance. The White House wants to eliminate it.

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YOU ARE: The FY 2019 House-Senate CJS Conference Appointee

YOUR TASK: Negotiate a Commerce-Justice-Science appropriations bill that adequately funds priority programs while staying fiscally responsible. You need to create a conference report that can pass both chambers by majority vote and avoid a Presidential veto.

THE CHALLENGE: The Bipartisan Budget Act increased the spending limit to $1.2 trillion. House and Senate appropriators have stuck to this limit, but its billions more than the White House wanted. The President is willing to go along with it, but he requires a few concessions before he’s willing to sign the bill. And there is disagreement between the House and Senate as to which programs should be the priority. Time is limited and different people will have different ideas about what’s most important to the nation, their colleagues, and their constituents.

THINGS TO THINK ABOUT:

1/ Divide your committee up with half representing the House and half the Senate. You might want to take ten minutes to determine your side’s major priorities and bargaining chips.
2/ How will you decide on numbers? Consensus? Majority vote? Starting with the easy points first? You might want to appoint a chair to keep the committee moving.
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