

# City of Englewood, Colorado: Priority Based Budgeting Implementation Plan

*Project Timeline*

## Already Completed

### PBB "Orientation" to Board

On-site: 1-2 hours – *Conducted Monday, February 23rd*

***CPBB Role and Workload:*** CPBB provides an orientation to the process for elected officials, describing the process, discussing outcomes in the organizations who have implemented the process, and having discussion with elected officials to answer their questions and ensure there's a comfort level.

***City of Englewood Role and Workload:*** CPBB will help City staff understand the technology needs in order to set up an effective webinar. Typically CPBB conducts a call with an IT staff member to describe the webinar needs. Any staff preparation to help ensure the presentation is on the Council agenda is effective.

## The Following Steps to Be Completed in April (extending into May, if necessary)

### Results Identification / Validation Workshop

On-site: 1-2 hours

***CPBB Role and Workload:*** CPBB works with the organization's elected officials and/or staff to identify, or to validate "Results" that the organization has already established. Results establish the foundation for Priority Based Budgeting.

***City of Englewood Role and Workload:*** The City's elected officials will be asked to participate in this exercise. No more than 1-2 hours is required of elected officials to participate in this exercise. City staff may be asked to print the exercise (if administered "live"), or email the exercise (if administered "electronically").

## Results Definition Workshop

On-site: 4-6 hours

**CPBB Role and Workload:** CPBB facilitates a workshop with staff (usually department heads and key staff, up to around 30 participants is best) to begin to identify all the ways the organization "achieves" each of the stated Results. CPBB leads the workshop, addressing each Result, one-by-one, soliciting feedback from the participants which form the basis for the creation of Results Definitions.

**City of Englewood Role and Workload:** Department heads, and key city staff who participate in the Results Definition Workshop should anticipate spending 4-6 hours of their time, on a single day, to complete this exercise. City staff may be relied upon to help provide paper and markers, and to reserve an appropriate room for the workshop to be effectively facilitated.

## Program Inventory Training "Workshop"

On-site: 1-1.5 hours

**CPBB Role and Workload:** While on-site, CPBB provides a training to staff, teaching departments how to identify "programs" at a level most effective for PBB. Following this training session, departments are provided a "Program Inventory Template," as well as examples from other organizations that will aid departments in completing the exercise.

**City of Englewood Role and Workload:** City staff will be relied upon to help set up the presentation logistics (audio and visual), and to distribute the Program Inventory Template (to each department), presentation slides and the recorded webinar.

## Departments Develop Program Inventories

Departments Given: 2-3 Weeks

**CPBB Role and Workload:** CPBB provides individualized support to the departments as they work on their program inventories. Often times, departments may request a conference call with CPBB, or exchange email with CPBB to help address specific questions.

**City of Englewood Role and Workload:** Each department will be responsible for completing their Program Inventory Template and submitting this to CPBB. Departments are given 2-3 weeks to complete this task, even though the workload anticipated is between 8-24 hours (departments are given extra time, in order to fit this effort in among their normal job duties).

## The Following Steps to Be Completed in May (extending into June, if necessary)

### Program Inventory Consultation with Departments

Ongoing support: on-site or via webinar

**CPBB Role and Workload:** While on-site, CPBB will meet individually with departments who still have questions about their program inventories.

**City of Englewood Role and Workload:** For departments who wish to schedule one-on-one time with CPBB staff, while "on site," department heads (and their key staff) should allow for 15-30 minutes of time to meet. CPBB recommends that departments schedule time in advance, to make it most efficient for each department wishing to meet.

### Finalize Program Inventories

Emails / Conference Calls Between CPBB and Departments: 1 week

**CPBB Role and Workload:** CPBB will review the finalized program inventories submitted by the departments, provide feedback and guidance to help the departments understand where the programs they've identified are either "too large" or "too small" and then advise the departments on any last changes that would be advised in order to finalize their program inventories.

**City of Englewood Role and Workload:** City staff (from the budget office) will be the primary point of contact for departments as they turn in their completed Program Inventories. Typically the City provides a quick "quality control" to ensure that each department has submitted their inventory, and that no information is missing, coordinating this with CPBB.

### Develop "Draft" Result Maps

CPBB Given: 2-3 Weeks

**CPBB Role and Workload:** CPBB will take all of the input generated during the Result Definition Validation Workshop, and create "Draft" Result Maps for each of the City's Results.

**City of Englewood Role and Workload:** City staff will receive the "draft" Result Maps from CPBB, and have the chance to review this information (providing any initial feedback to CPBB) before the Result Maps are validated. Typically, staff can review this information within a few hours.

## Finalize Result Maps

(Various Approaches: 1 hour)

***CPBB Role and Workload:*** Based on direction from the City, CPBB will either help the City "validate" the Result Maps with City Council, or solicit feedback from elected officials and/or City staff in order to refine and revise the Result Maps. CPBB will provide a summary of all feedback received, in order that each contributor to the Result Definition process can see their input has been captured and incorporated.

***City of Englewood Role and Workload:*** Depending on the approach the City takes, validating the Result Maps should not take longer than 1 hour of time. If elected officials are involved, this process may be conducted "live" in a meeting, or "electronically" - in either case, City staff will be relied upon to distribute the exercise and collect the responses.

## Program Costing Workshop

Webinar: 45 mins - 1 hour

***CPBB Role and Workload:*** CPBB will provide a Program Costing training session to staff who will be responsible for filling in the data into CPBB's Program Costing Template. CPBB will provide customized Program Costing templates for each of the City's departments (or divisions), as well as a recorded version of the webinar the City can refer to.

***City of Englewood Role and Workload:*** City staff will be relied upon to help set up the webinar logistics (audio and visual), and to distribute the Program Costing Template (to each department), presentation slides and the recorded webinar. Those who participate in this webinar should allow for 45 minutes to 1 hour for the training.

## Departments Develop Program Costs

Departments Given: 3-6 Weeks

***CPBB Role and Workload:*** CPBB will be available during to assist staff during the process of developing program costs. Typically, departments will email CPBB with questions, or schedule conference calls with CPBB in order to strategize about the Program Costing template, and the easiest way to fill it out.

***City of Englewood Role and Workload:*** Those who are involved in the task of completing Program Costing are given anywhere from 3 to 6 weeks to complete this task. Typically staff from the budget office are involved in the task of developing

"fully loaded personnel costs" while the departments are responsible for allocating staff to programs. This effort does not have to be completed until after Peer Review.

## **The Following Steps to Be Completed in June (extending in July, if necessary)**

### **Program Scoring Workshop**

Webinar: 1-1.5 hours

***CPBB Role and Workload:*** CPBB will provide a Program Scoring training session to those participating in scoring, instructing departments how to assign appropriate scores. CPBB will provide customized "Program Scorecards" for each department, including the department's program inventory, and the appropriate scoring criteria. CPBB will also provide the recorded webinar.

***City of Englewood Role and Workload:*** City staff will be relied upon to help set up the webinar logistics (audio and visual), and to distribute the Program Scorecard Template (to each department), presentation slides and the recorded webinar. Those who participate in this webinar should allow for 1-1.5 hours for the training.

### **Departments Participate in Program Scoring Process**

Departments Given: 2-3 Weeks

***CPBB Role and Workload:*** As departments engage in the process of scoring their programs, CPBB provides coaching and guidance along the way, helping the departments with questions about how to assign their scores. Typically, departments email CPBB or schedule conference calls to strategize about the most appropriate way to assign scores.

***City of Englewood Role and Workload:*** Departments are given 2-3 weeks to complete their Program Scorecards, and they are encouraged to involve staff leadership at all levels in this process. While they are given several weeks, the actual workload anticipated should be anywhere from 16-32 hours total time, depending on how involved they choose to make their own staff.

## The Following Steps to Be Completed in July (extending in August, if necessary)

### Peer Review Workshop

Webinar: 1-1.5 hours

**CPBB Role and Workload:** CPBB will provide a Peer Review training session for those who are participating on Peer Review teams. CPBB will help the City identify who the most effective Peer Review team members could be, and then train each team as to how to evaluate scores from other departments (this will include: how to ask departments for more info, and how to complete the Peer Review template).

**City of Englewood Role and Workload:** City staff will be relied upon to help set up the webinar logistics (audio and visual), and to distribute the Program Review Template (to each department), presentation slides and the recorded webinar. Those who participate in this webinar should allow for 1-1.5 hours for the training.

### Peer Review Teams Participate in Peer Review Process

Departments Given: 2-3 Weeks

**CPBB Role and Workload:** As Peer Review team members complete the Peer Review process, CPBB is available to each team to help them through the process of evaluating the scores of other departments. Typically, CPBB exchanges in email correspondence and phone calls to assist the work of the Peer Review teams.

**City of Englewood Role and Workload:** For those staff participating in Peer Review, they will learn how to structure their time around a recommended 3-5 meeting process, where each meeting should last about 1-2 hours (and no meeting lasting longer than 3 hours). Therefore, at most, participants should plan on 15 hours of meeting time devoted to Peer Review (and at least about 6-9 hours).

### City Finalizes Peer Review and Program Costs

City Given: 1 Week

**CPBB Role and Workload:** When each Peer Review team has submitted their recommended scores (including scoring changes), and as each department has completed their Program Scoring templates, CPBB collects the information from the City and ensures that all information is complete (and/or follows up with the City if any information is missing).

***City of Englewood Role and Workload:*** City staff will be relied on to collect the information from the Peer Review teams and provide a cursory quality control of the information to make sure it's complete, and then send it to CPBB.

### **Determine Final Program Scores, Quartile Rankings**

CPBB Given: 1-2 Weeks

***CPBB Role and Workload:*** CPBB applies its scoring methodology to calculate final program scores for each of the City's programs, and performs an analysis on each of the programs to determine final "Quartile Rankings." CPBB will begin the process of loading this information into the City's final Resource Alignment Diagnostic Tool (the final deliverable of implementation).

***City of Englewood Role and Workload:*** City staff will have minimal involvement here. CPBB may reach out to staff to ask questions where data is missing or in question.

### **Issue "Peer Review Exception Report" to the City**

CPBB Given: 1-2 Weeks

***CPBB Role and Workload:*** CPBB will not only evaluate programs on the basis of the Peer Review recommended scores, but also on the scores that Departments provided in their self-assessment. Comparing these scores, CPBB will develop a report that identifies where the impact of Peer Review resulted in a different "Quartile Ranking" for any program, compared to the department score.

***City of Englewood Role and Workload:*** City staff will receive the "Peer Review Exception Report" and be given the opportunity to follow up with both the departments and Peer Review teams to review programs that changed quartiles. Typically this process is conducted within a 1 week time period, giving departments an opportunity to explain their scores, and giving Peer Review the same opportunity.

### **Create PBB Model: Resource Alignment Diagnostic Tool**

CPBB Given: 1-2 Weeks

***CPBB Role and Workload:*** CPBB will create a customized Resource Alignment Diagnostic Tool for the City, that will include each of the City's programs, program costs, quartile ranking, and scoring criteria. This dynamic model is explained in greater detail in the scope of services.

***City of Englewood Role and Workload:*** City staff will have minimal involvement here. CPBB may reach out to staff to ask questions where data is missing or in question.

### **Provide Model "Preview" to City Team**

CPBB Given: 1-2 Weeks

***CPBB Role and Workload:*** As soon as the Resource Alignment Diagnostic Tool is completed, CPBB will provide a presentation to City staff in order to demonstrate the results of the City's work, as well as the functionality of the Tool, before presenting it to Council. Typically this gives the City staff first opportunity to review the data and ensure it's appropriate for presenting the information further.

***City of Englewood Role and Workload:*** City staff will be asked to reflect on the presentation of the initial Resource Alignment Diagnostic Tool, and provide feedback to CPBB where any data is in question or in need of revision, prior to presenting the Tool further.

### **Present Final Model to Staff and/or Elected Officials**

On-Site or Webinar: 1-2 hours

***CPBB Role and Workload:*** There are various options open to the City in terms of presenting the final Resource Alignment Diagnostic Tool to elected officials. CPBB can provide an on-site (or webinar) presentation to elected officials to coach them as to their role in effectively using the Tool, and helping portray the power and use of the information that has been created through the implementation process.

***City of Englewood Role and Workload:*** City staff will be asked to strategize with CPBB as to how best to present the City's Resource Alignment Diagnostic Tool to elected officials and/or a larger staff audience. City staff will also receive training on the use of the Tool, and how to incorporate the information into the City's budget process.