



## SERVICE BASED BUDGETING

# Frequently Asked Questions

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## SBB Project Overview

### What is Service Based Budgeting (SBB)?

SBB is a budgeting approach that identifies the tasks needed to accomplish the mission of the California Department of Fish and Wildlife (CDFW or the Department). Below are four key aspects of SBB:

- **Organized by Service:** CDFW identifies the services that represent all of the activities that occur within the Department to meet CDFW's mission.
- **Task-based:** Subject matter experts develop a list of service-specific activities, referred to as tasks, that align with each service.
- **Labor-focused:** SBB collects labor hours desired per task (mission level), and currently spent per task (current level).
- **Annual Process:** SBB tasks and service levels should be reviewed each year in advance of the budget cycle.

### Why is CDFW conducting an SBB review?

As directed by the Legislature, driven by our previous strategic visioning efforts, and building upon our recent budget evaluation work, CDFW is conducting a comprehensive Service Based Budget review. This project is an important opportunity to clearly define Department activities and the tasks we perform to deliver our mission. CDFW's 2012 Strategic Vision, 2017 Expenditure Concept, and the 2018 Senate Budget Bill are key drivers of the SBB project.

### What is the timing and duration of the SBB project?

The SBB project is a long-term effort running through 2021, when the final Service Based Budget Review Report is due to the Legislature. The data collection and analysis phase of the project was completed in September 2019, with CDFW operationalizing SBB through 2020. SBB is also an ongoing process, as tasks and service levels should be reviewed each year in advance of the budget cycle.

### How will the results of the SBB review be used?

SBB will allow CDFW to describe Department activities in terms of CDFW services provided to the public. SBB will also help inform the future budget based on the labor costs of tasks and activities that make up the services the Department provides.

### How does SBB connect to the Department's strategic vision?

SBB helps the Department achieve the goals set forth in the 2012 Strategic Vision. There were four key goals that came out of this strategic visioning effort, which were reviewed and built upon through the Expenditure Concept effort in 2017:

1. Strong Relationships with Other Agencies, Governments, Organizations and the Public
2. Highly Valued Programs and Quality Services
3. An Effective Organization
4. An Efficient Organization

SBB's benefits directly relate back to the goals of the strategic vision.

### What are the benefits of SBB?

CDFW will experience extensive benefits from the implementation of SBB, including:



- **Stakeholder communication:** SBB enables CDFW staff to tell a compelling story of the Department in terms of services and associated costs to the Governor's Office, Department of Finance, other agencies and partners, external funding agencies, the Legislature, and the public.
- **Increased programmatic understanding:** SBB gives Regional Managers, Branch Chiefs and their Program Leads a fresh opportunity to take a comprehensive look at their entire operation through the SBB process. SBB also encourages strategies for making the best use of available resources to deliver CDFW's services.
- **Data driven decisions:** SBB provides data and analysis that allows executive staff to make informed decisions and enables an objective and fact-based explanation and understanding of choices made.
- **Reporting flexibility:** SBB provides a budget model and structure that allows flexibility to present relevant data and enables year-to-year flexibility in budgeting decisions.
- **Cost transparency:** SBB increases visibility to the costs required to run Department services at desired service levels, highlights current service levels, and identifies resource gaps.
- **Information consistency:** SBB builds a budget framework based on standardized services/tasks and brings consistency in measurement, reporting, and decision-making across the Department.
- **Organizational alignment:** SBB links service level standards to CDFW's mission, improves allocation of budget and resources to realize desired levels of service, and enables year-to-year adaptability of budgeting decisions.
- **Operational efficiency:** SBB identifies opportunities for efficiency improvement through metrics reporting and comparative analysis and enables best practice sharing on operational models and staffing models.
- **Performance and risk management:** SBB enables performance measurement and metrics usage across services and provides the foundation for better service level measurement, strategic planning, and risk management.

### How will SBB inform future CDFW budgeting?

SBB is an opportunity to better explain the funding CDFW needs to meet its mission. After SBB is implemented, the information that the SBB review provides will enable data analysis capabilities to make informed decisions on CDFW's budget. SBB data will demonstrate where there are gaps between CDFW's mission level of service and current level of service for the tasks the Department performs.

CDFW will leverage SBB data to analyze the costs and associated revenue sources of the tasks the Department performs. Through this analysis, CDFW can demonstrate how tasks are supported by the existing revenue structure and fund sources. This analysis will identify tasks that may be more appropriately supported by a different funding structure.

### Who is on the SBB project team?

The SBB project is governed by a team of CDFW executive leaders and is a collaborative effort of managers and employees from across the Department working alongside independent consultants from Deloitte. Deloitte is a leading management consulting firm with extensive credentials in projects of this kind.



## **What is the CDFW SBB “What We Do” Chart?**

CDFW's "What We Do" Chart represents the service structure under which the task catalog is organized. The chart was created by categorizing CDFW's mission statement into eight core service areas, through a collaborative effort of the CDFW SBB Executive Working Group and subject matter experts and the feedback of public stakeholders. These services are then further broken down into tasks in the following hierarchical manner:

- Mission
- Service
- Program
- Sub-Program
- Task

CDFW's SBB “What We Do” Chart serves as a helpful visual of the first three levels of the service hierarchy and provides definitions of the each of the core CDFW service areas.

## **What is the CDFW SBB task catalog?**

The SBB task catalog is a full list of tasks the Department needs to perform to meet its mission. The task catalog is meant to capture the activities the Department needs to perform to meet its mission (including tasks the Department is expected to perform but does not have the resources or capacity to perform). The task catalog serves as the basis for analyzing gaps between CDFW's mission level of service (the ideal) and current level of service (the reality), for the work the Department does. This measurable data will inform future budget and operational changes to meet desired levels of service.

The task catalog is organized by service areas which are directly based upon CDFW's mission statement. Developing a task catalog that encompasses CDFW's diverse and complex mission is an enormous undertaking. CDFW is committed to transparency in the development of this product. Department and project team leadership greatly appreciate the understanding and support of stakeholders throughout this process, especially so during the first year of the project as first iterations of the task catalog undergo review, revision, and refinement.

The task catalog was developed by over 100 CDFW subject matter experts. Subject matter experts are experienced and knowledgeable staff who were selected from across the Department by CDFW leadership and trained on the SBB methodology. The task catalog has gone through multiple rounds of review from the CDFW SBB Executive Working Group (CDFW executive leaders representing a diverse range of Department areas). It is subject to additional refinement and will be reviewed and updated on an annual basis.

## **Specific SBB Topics**

### **Does CDFW perform all tasks in the task catalog today?**

Throughout the SBB process, CDFW differentiates between “mission level” (ideal) and “current level” (actual, at a point in time) tasks and resources. The task catalog represents the “mission



level” full list of activities CDFW considers necessary to meet its mission, including tasks CDFW does not currently have the resources or capacity to perform.

**What is the justification for tasks in the task catalog?**

For each task, CDFW SBB subject matter experts are documenting one or more justification categories from the following list:

- Legal Mandate
- State or Departmental Policies
- Professional and/or Industry Standards
- Operationally Necessary
- Constituent Expectation/Demand

In cases where a task has more than one justification, multiple justification categories will be checked. Each task will be associated with one or more justifications.

**What is the level of effort associated with each task?**

CDFW SBB subject matter experts are in the process of documenting labor classifications, associated labor hours, frequencies (time interval for the identified labor hours) and multipliers (number of times the task takes place across the Department) to calculate the total estimated labor hours required to accomplish a task. This is an extensive amount of data.

**Does the task catalog identify who performs each task?**

CDFW SBB subject matter experts document the labor classifications, but not individuals, that contribute to the performance and completion of each task. Supervisory and administrative time will also be applied to tasks.

**I believe a task has been omitted, should be recategorized, or needs to be described differently in the task catalog. Will CDFW update the task catalog?**

Stakeholder input is critical to the success of the SBB project. Feedback regarding perceived task omissions should be sent to [SBBinfo@wildlife.ca.gov](mailto:SBBinfo@wildlife.ca.gov). These comments are received directly by the CDFW SBB project team and shared with the CDFW SBB Core Team for review. The SBB project team works with the appropriate CDFW subject matter expert to review stakeholder feedback on tasks and make any necessary changes. If a perceived omission is found to already be included in or covered by an existing task, the task catalog may be updated to provide better clarity, such as expanding a task description. The CDFW SBB Core Team and Executive Working Group assist in ensuring appropriate categorization and organization of the task catalog and associated programs and subprograms among the numerous recategorizations and reorganizations possible.

Comments received after the initial review cycle has ended will be considered in the next review cycle. CDFW may not be able to respond to each individual comment submission. To follow up on the outcome of a comment submission, please contact [SBBinfo@wildlife.ca.gov](mailto:SBBinfo@wildlife.ca.gov).



**Why are some tasks more detailed than others? Shouldn't the level of detail of all tasks be the same?**

Tasks are meant to capture a meaningful level of detail for informing Department budgeting and management decisions. The level of detail needed to accomplish this objective may differ based on the subject matter. Subject matter experts used their best judgment regarding what level of detail would be appropriate for each task. The nature, subject matter, or labor classifications of certain tasks may necessitate more detail than others. When needed, subject matter experts also completed service glossary entries with additional details.

All tasks will be analyzed using standardized supporting data sets, including justification categories, associated labor classifications contributing to the performance of the task, labor hours, frequencies (time interval for the identified labor hours) and multipliers (number of times the task takes place across the Department).

**I want to know how many resources are going to specific activities. Can I find this in the task catalog?**

CDFW has collected the first year of current level of service data, which provides a point-in-time snapshot of the labor hours spent on each task in the current year. CDFW plans to update this snapshot of total current labor hours annually.

Please note that labor hours are only one component of total cost. This effort does not include non-labor costs, such as equipment and technology costs.

**I believe some tasks are underfunded. Will the task catalog show which tasks are underfunded/need more resources?**

The task catalog is one of several important inputs to the larger process of analyzing and identifying areas for process improvement, staffing needs, and funding considerations.

The information made available through the task catalog, and the supporting mission and current service level data, will allow CDFW to perform further analysis that identifies areas for operational improvement meet mission levels of service. CDFW will also be able to identify mandated tasks that may need more resources.

**I believe some tasks are performed slowly or inefficiently. Will the task catalog help me understand expected turnaround time and/or the efficiency of performing tasks?**

The task catalog is one of several important inputs to larger process of analyzing and identifying areas for process improvement, staffing needs, and funding considerations. Mission level data for tasks in the task catalog are meant to identify the ideal, average amount of staff labor hours to complete a task, but does not identify the expected turnaround time. For example, a staff classification ideally may spend an hour every week for six months on a particular task. This would be represented in the task catalog mission level data as 24 hours needed from that labor classification for that task, but the task catalog would not identify six months as the ideal time to turnaround that task.

The information made available through the task catalog, and the supporting mission and current service level data, will allow CDFW to conduct further analysis that identifies areas for operational improvement and areas that may not be sufficiently staffed to meet mission levels of service. As





such, the full SBB review process will inform both budget and operational changes and improvements.

By April 15, 2021, the Department will report to the Legislature regarding the incorporation of SBB findings into its operations and budget and any proposed operational and budget changes resulting from the service based budget review.

**I want to understand more about CDFW’s policies, procedures and/or timelines for completing tasks. Does the task catalog include this information?**

Defining CDFW policies, operational processes, and operational timelines is not the intended purpose of the task catalog and it does not include this information. Rather, it is meant to capture a meaningful level of detail regarding the activities the Department needs to perform to meet its mission, to enable analysis for budgeting decisions.

## **Additional Questions and Feedback**

**Where can I go with additional questions or to provide feedback on the SBB project?**

Contact the Department at [SBBinfo@wildlife.ca.gov](mailto:SBBinfo@wildlife.ca.gov) with additional questions or feedback related to the SBB project.

CDFW is committed to communicating transparently regarding this effort. A dedicated CDFW SBB webpage (<https://www.wildlife.ca.gov/Budget/Service-Based-Budgeting>) has been established to provide informative project documentation and progress materials on which we welcome your feedback. The webpage will continue to be updated throughout the project.

We also encourage you to participate in SBB External Advisory Committee meetings which are conducted to review and advise each project phase. These meetings are open to the public. Please contact the Department at [SBBinfo@wildlife.ca.gov](mailto:SBBinfo@wildlife.ca.gov) to receive communications related to SBB External Advisory Committee meetings. Committee meeting updates and records are also made available to the public on the [SBB webpage](#).