



California Department of Fish and Wildlife



Project Update

February 2019



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SBB Overview

Project Background

About the SBB Project

CDFW is embarking upon a Service Based Budget (SBB) Review, which builds upon the 2012 Strategic Vision and 2017 Expenditure Concept, and was mandated by the 2018 Senate Budget Bill.

The Legislature requires CDFW to enter into a contract with an independent entity to define CDFW activities and tasks necessary to deliver the Department's mission and align those activities to programmatic areas. Deloitte Consulting, a leading management consulting firm, has been hired as the independent contractor to complete the SBB methodology which will support the final report to the Legislature.

The SBB Review is not changing what the Department does, rather, it is an assessment that will assist CDFW in better describing its activities and the services it provides to the public.

Project Governance

The SBB Review is governed by a team of CDFW executive leaders and is a collaborative effort of employees across CDFW.

Project Timeline

The SBB Review is a long-term effort running through April 2021, when the final oversight hearings will be held by the Legislature. The project is in its beginning phases and as key milestones are accomplished, CDFW stakeholders will be kept informed. Current phases of the project are expected to be completed in September 2019.

Project Outcome

The results of the SBB Review will inform CDFW's future budgets, based on desired levels of service across CDFW programs.

CDFW's Mission Statement

To manage California's diverse fish, wildlife, and plant resources, and the habitats upon which they depend, for their ecological values and for their use and enjoyment by the public.

— **SBB Model** —

Mission

Service Hierarchy

Service

Program

Sub-Program

Task Category

Task

Project Governance

We will partner throughout the Department to define the Mission level of service, analyze current service levels, and update external groups

Groups	Description	Members
Core Team	<ul style="list-style-type: none">• Make project-level decisions and manage project activities• Drive the SBB model and process design• Guide the task catalog development• Communicate project status and accomplishments	<ul style="list-style-type: none">• Director• Chief Deputy Director• Gabe Tiffany, Deputy Director• Nathan Voegeli, SBB Project Manager• Whitney Albright, SBB Project Lead• Other CDFW leadership• Deloitte Team
Executive Working Group	<ul style="list-style-type: none">• Inform and advise project decisions• Own overall process management• Communicate SBB process to Divisions and Regions• Identify Subject Matter Experts (SMEs)• Review and validate SBB data	<ul style="list-style-type: none">• Gabe Tiffany, Deputy Director• Nathan Voegeli, SBB Project Manager• Whitney Albright, SBB Project Lead• Other CDFW leadership• Deloitte Team
Subject Matter Experts	<ul style="list-style-type: none">• Develop list of tasks and activities performed by Department staff• Lead collection of Mission level of service needed for tasks and current level of service provided for tasks	<ul style="list-style-type: none">• Nathan Voegeli, SBB Project Manager• Whitney Albright, SBB Project Lead• Subject Matter Experts (SMEs)• Deloitte Team

Strategic Vision Goals

SBB further assists the Department in achieving the goals set forth in the 2012 Strategic Vision

Strategic Vision Goals

SBB Benefits



Strong Relationships with Other Agencies, Governments, Organizations and the Public



- Stakeholder Communication
- Cost Transparency
- Information Consistency



Highly Valued Programs and Quality Services



- Increased Programmatic Understanding
- Performance & Risk Management



An Effective Organization



- Data Driven Decisions
- Organizational Alignment
- Reporting Flexibility



An Efficient Organization



- Operational Efficiency

The Benefits of SBB

CDFW will ultimately implement SBB in FY21-22, but will realize its extensive benefits much sooner

Stakeholder Communication

- Enables CDFW staff to tell a **compelling story** of Fish and Wildlife in terms of **services and associated costs** to Governor's Office, Department of Finance, other agencies and partners, external funding agencies, the Legislature, and the public

Increased Programmatic Understanding

- 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
- Encourages **strategies for making the best use of available resources** to deliver CDFW's services

Cost Transparency

- Increases **visibility to the costs** required to run Department services at desired service level
- Highlights current service level and **identifies resource gaps**

Data Driven Decisions

- Provides data and analysis that allows executive staff to make **informed decisions**
- Enables **objective and fact-based** explanation and understanding of choices made

Reporting Flexibility

- Provides a budget model and structure that **allows flexibility to report** and present relevant data
- Enables year-to-year **flexibility** in budgeting decisions

Information Consistency

- Builds a budget framework based on **standardized services / tasks**
- Brings **consistency** in measurement, reporting, and decision-making **across the Department**

The Benefits of SBB (cont.)

CDFW will ultimately implement SBB in FY21-22, but will realize its extensive benefits much sooner

Organizational Alignment

- Links service level standards to **CDFW's mission**
- **Improves allocation** of budget and resources to realize desired levels of service
- Enables year-to-year **adaptability** of budgeting decisions

Operational Efficiency

- Identifies opportunities for **efficiency improvement** through metrics reporting and **comparative analysis**
- Enables **best practice sharing** on operational models and staffing models

Performance & Risk Management

- Enables **performance measurement and metrics usage** across services
- Provides the foundation for better **service level measurement, strategic planning and risk management**

SBB Project Update

Executive Summary

CDFW is in the beginning phases of the SBB Review effort. The project governance, approach, and timeline have been established. Service through Sub-program levels SBB service hierarchy have been defined in collaboration with executive leaders from across the Department. Defining the full SBB task catalogue with experienced and knowledgeable staff from across the Department will follow.

Key Accomplishments

- **Governance:** The SBB project governance teams have been assigned by the Director and established to lead, advise, and coordinate project activities.
- **Launch:** The project approach and timeline have been established. (*Contract Deliverable #1: Approach and Timeline*)
- **Stakeholder Engagement and Resources:** Informative resources, communications, and meetings have been initiated and established to engage, consult with, and obtain feedback from internal and external Department stakeholders.
- **Service Matrix:** Service through Sub Program levels have been defined in collaboration with a broad group of executive leaders.
- **SME Selection:** Subject matter experts have been selected to create the task catalogue based upon criteria such as broad departmental understanding and proficiency in their areas of expertise.

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Executive Summary

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Upcoming Activities

- **SME Training:** A training plan has been established to instruct SMEs on the SBB methodology and task catalogue completion. (*Contract Deliverable #2: SME Selection and Training*)
- **Task Catalogue Buildout:** SMEs will populate the Task Category through Task levels of the SBB program matrix and collect mission and current service levels for each task from regional staff.
- **Data Validation:** The SBB project team executive leaders will review and validate SBB task and service level data.

Phase 1 Project Milestones/Deliverables	Due	Status
Approach and timeline	1/18	
SME selection and training	2/15	
Internal stakeholder engagement plan	4/5	
External stakeholder engagement plan	4/5	
SBB taxonomy and methodology	4/5	

A New Budgeting Approach

The Department is embarking upon a new approach to budgeting that aligns the distribution of funds with its Mission

1

SBB is a fresh approach to facilitate the development of the Department's annual budget.

2

SBB will allow CDFW to tell its story in a compelling manner by describing its organization in terms of services it provides to the public.

3

SBB will help inform the future budget based on the costs of operational tasks and activities that make up the services the Department provides.

What SBB is not

A Department Restructuring

While SBB may highlight areas for efficiency improvement, restructuring the Department is not the intent of SBB

A Funding Decision

Although SBB will demonstrate which services require additional funding, funding changes are not part of SBB

A Fixed Analysis

SBB tasks and service levels should be reviewed each year in advance of the budget cycle

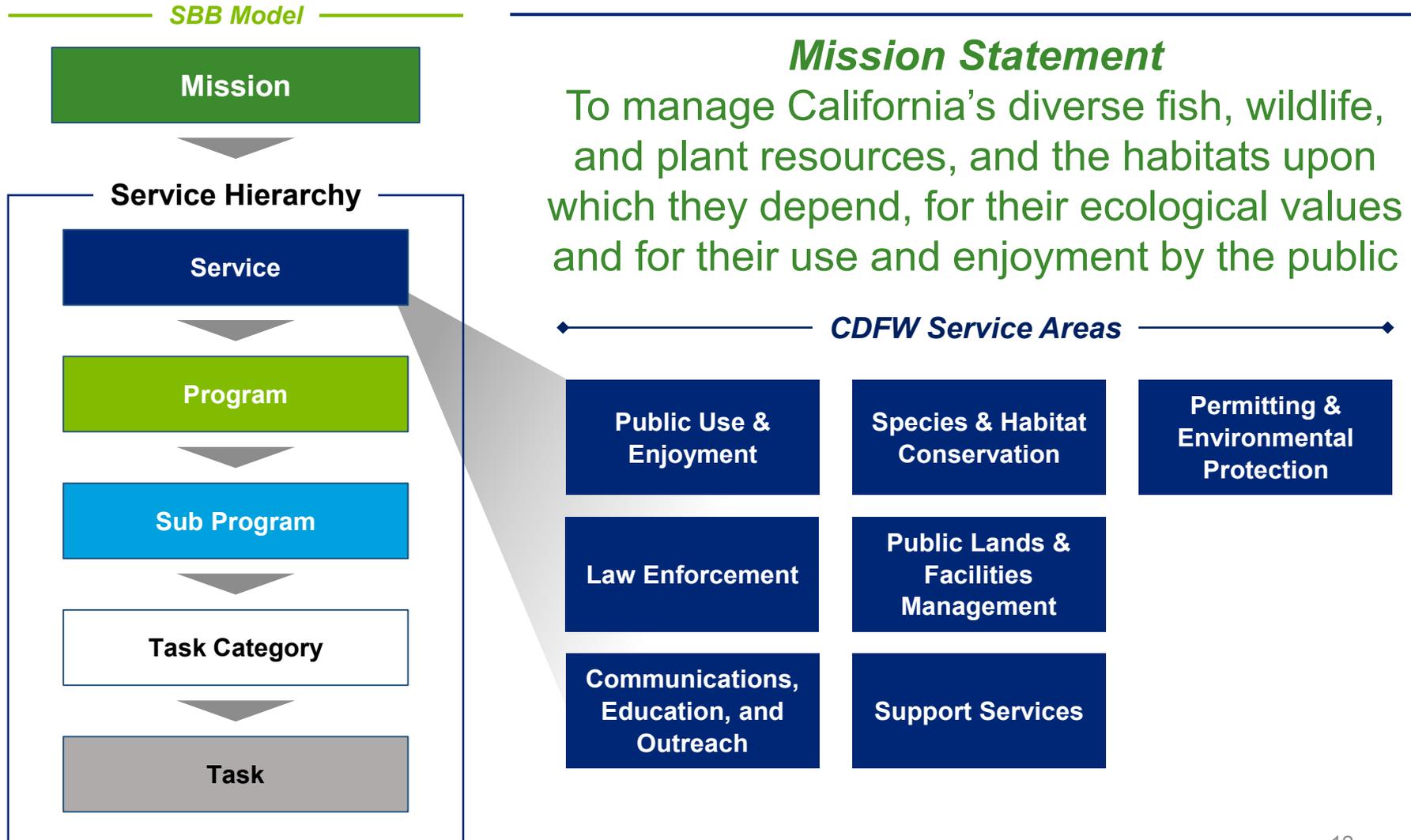
How Does SBB Work?

SBB is a budgeting approach that identifies the tasks needed to accomplish the Department's Mission



Understanding the SBB Service Structure

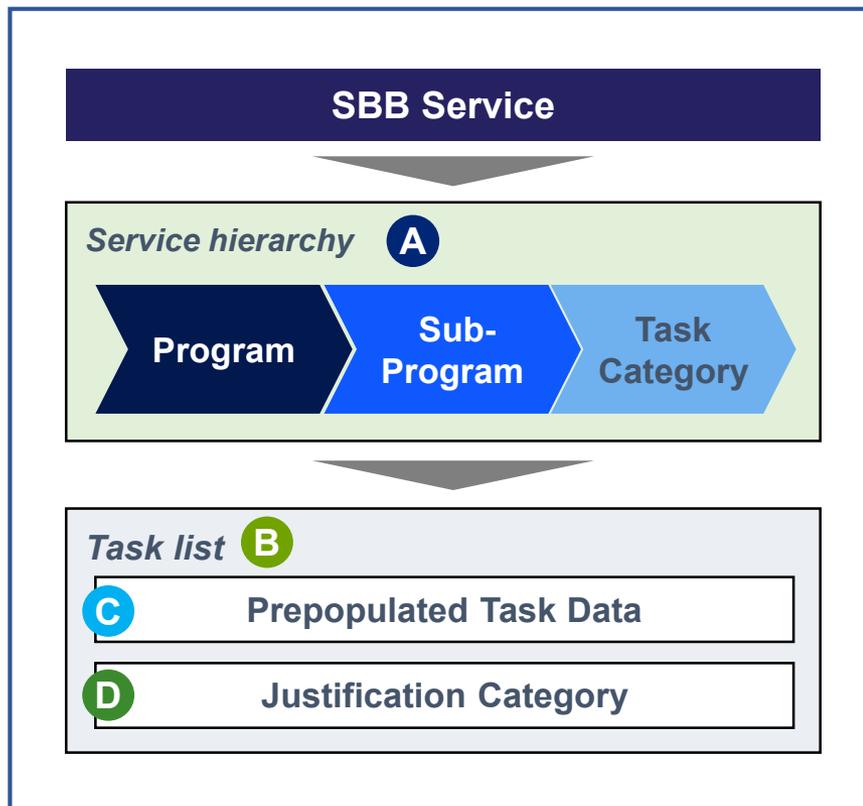
The Mission is categorized into core service areas



SBB Service Matrix Components

SMEs ultimately create a matrix for each of the core services that capture all the potential tasks required to achieve the department's Mission, which will be reviewed by the SBB Executive Working Group

Key Matrix Components



- A Service hierarchy**
Shows the hierarchy of tasks from service to program to sub-program to task category and to tasks
- B Task list / levels**
Contains a standard menu of tasks, developed by SMEs, from which regional staff will select as needed to fully achieve the mission of the service at their site
- C Prepopulated task data**
Includes labor hours, desired performance and the most appropriate labor classes needed to complete each task
- D Justification category**
Refers to criteria, internal or external to the department, that justifies why the task should be performed

Task Data

For most tasks, SMEs will prepopulate data based on their experience. Regional users can modify the data as necessary with written justification

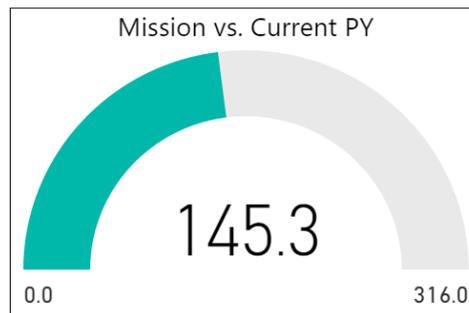
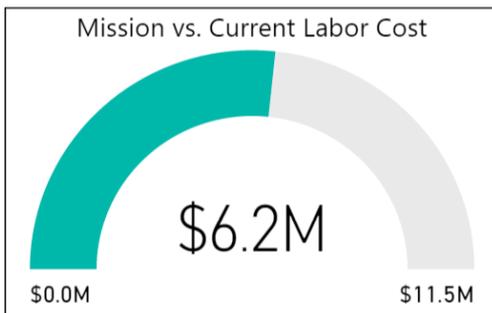
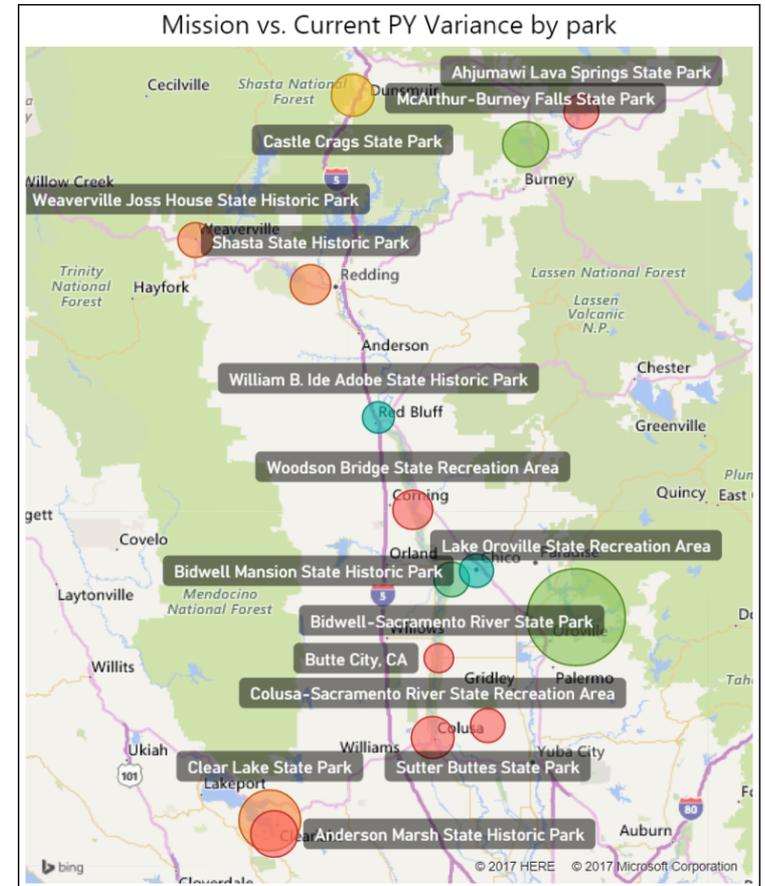
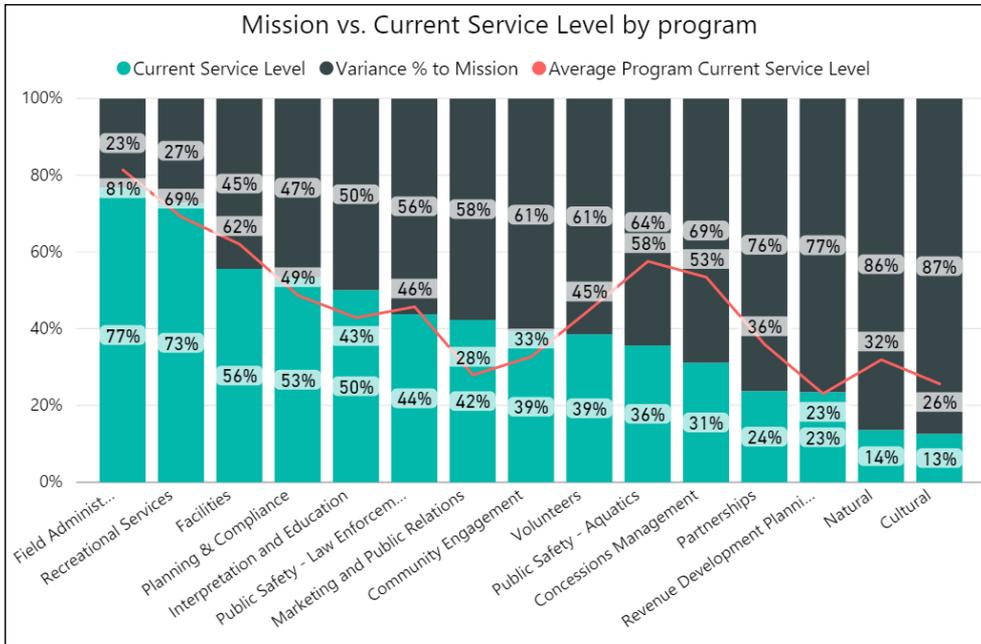
Task Description			Task Information			
B Task Name	B Task description	C Desired performance	C Frequency	C Multiplier Count	C Labor Class	C Hrs
TRADITIONAL HUNTER EDUCATION	Classroom, homework, field instruction, minimum of 10 hours	Sufficient to satisfy hunter demand	Semi-monthly (24)	1 (type of class)	Fish & Game Warden	1
					Certified Volunteer Instructor	12
<u>DATA FOR ILLUSTRATIVE PURPOSES ONLY</u>						
BUDGET REPORTING	Audit expenses and labor charges; prepare monthly reports and projections	Provide accurate financial report to manager based on data in system	Monthly (12)	6 (individual reports ea. month)	Associate Governmental Program Analyst	2
<u>DATA FOR ILLUSTRATIVE PURPOSES ONLY</u>						

Prepopulated data by SMEs	SMEs prepopulate mission level <u>frequency</u> , <u>labor classification</u> and <u>hours</u> for most tasks, but regional staff can modify those data—with justification—at the regional level
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Data input by Regions	Regional staff enters <u>multiplier count</u> for the mission level, and later the current <u>performance data</u> by position at the regional level
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Dashboard Analytics Enabled by SBB Data

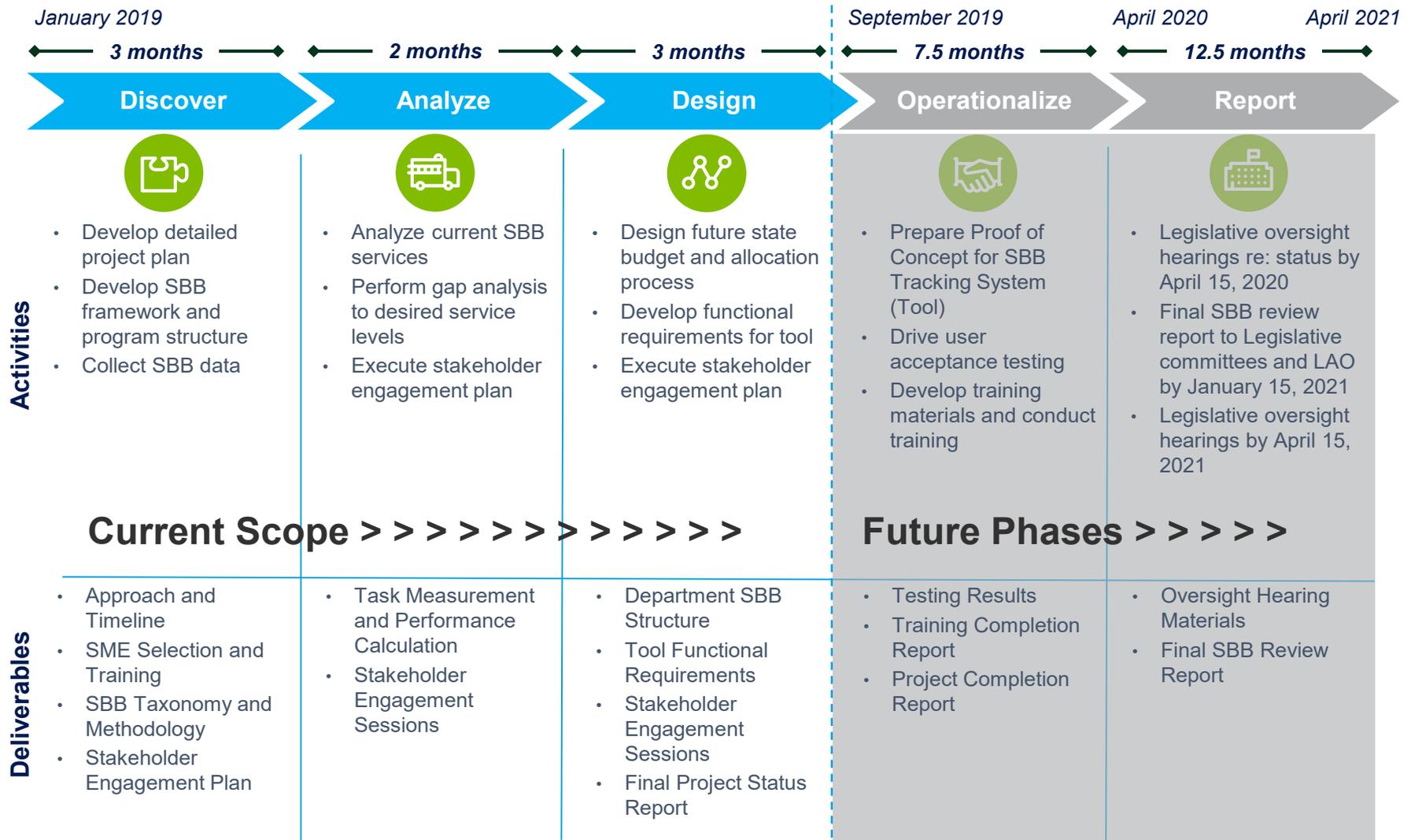
Interactive reports and dashboards will enable CDFW to track key performance metrics and facilitate data-driven decision making



DATA FOR ILLUSTRATIVE PURPOSES ONLY FROM CA DEPT. OF PARKS AND RECREATION SBB PROJECT

Phased SBB Approach

The implementation will occur over two years with distinct phases



Note: Duration of project phases subject to change. Visit the CDFW SBB webpage (<https://www.wildlife.ca.gov/Budget/Service-Based-Budgeting>) for the latest information.

Government Entities and External Stakeholders

CDFW is committed to open communication and engagement with external stakeholders over the course of SBB project activities



External Communications, Resources, and Engagement

- Public SBB webpage on CDFW website with informational resources (including SBB overview, project team list, and frequently asked questions)
- Dedicated SBB mailbox for project inquiries
- Project status updates at public F&G Commission meetings
- Informational external stakeholder outreach
- Public SBB External Advisory Committee meetings

Service Matrix Progress Draft

Service Matrix Progress Draft

Background Information

Before reviewing the SBB Service Matrix Progress Draft, be sure to review the SBB informational resources on the [Service Based Budgeting Webpage](#) to learn more about the SBB methodology and approach.

The SBB Service Matrix is in development and is subject to additional adaption as the SBB project continues.

If you have any questions, comments, or feedback on the SBB Matrix Progress Draft, please contact CDFW at SBBinfo@wildlife.ca.gov.

Your feedback will be received for consideration by members of the SBB Project Team.

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— **SBB Model** —

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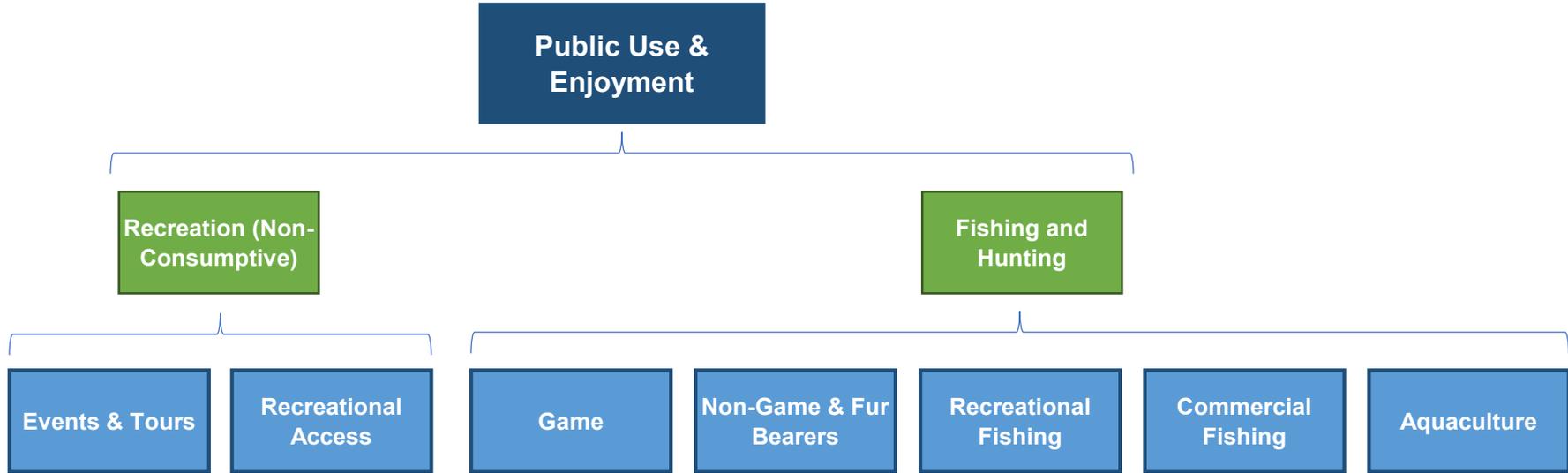
CDFW SBB Service Matrix: Services to Programs

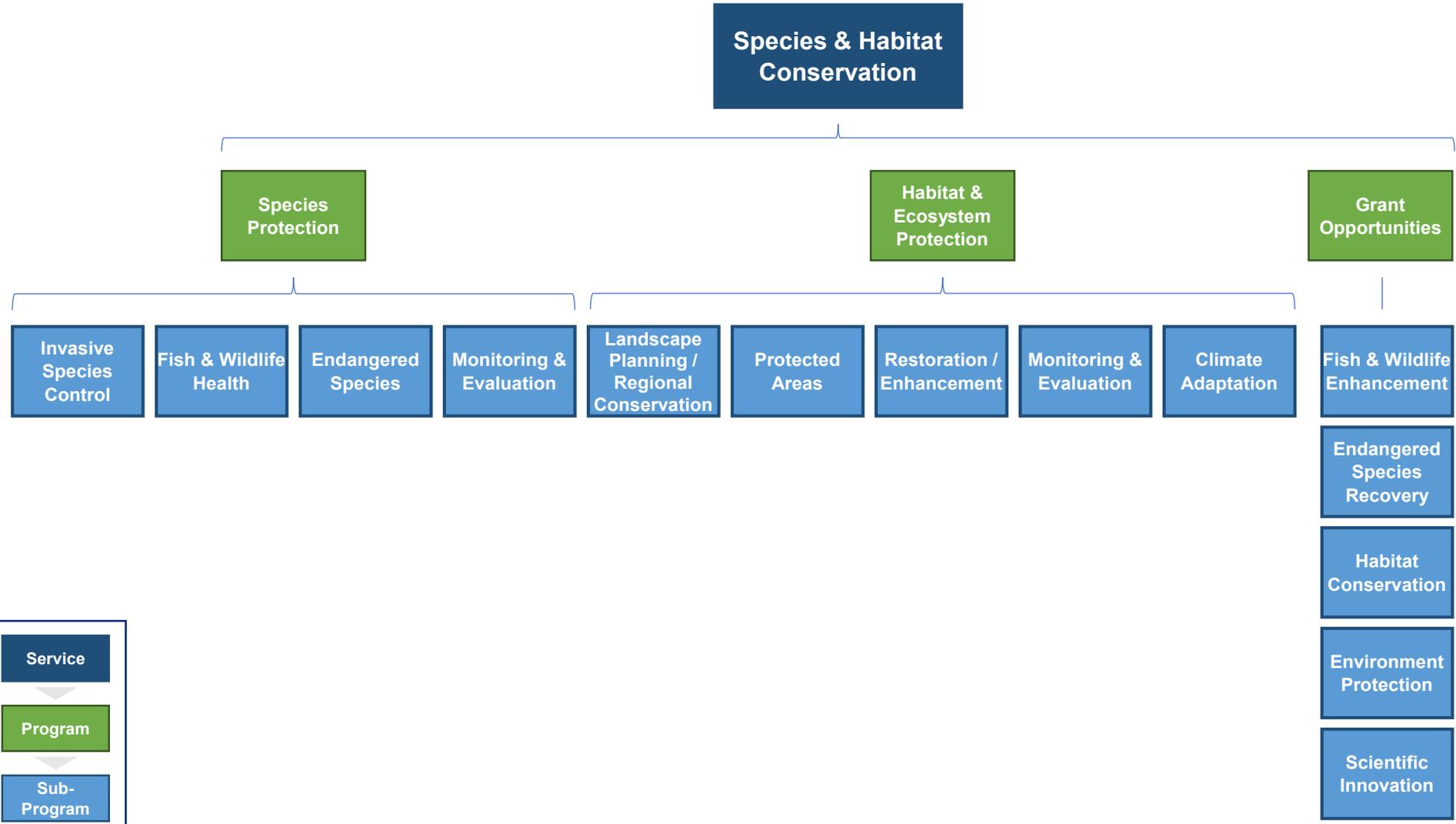
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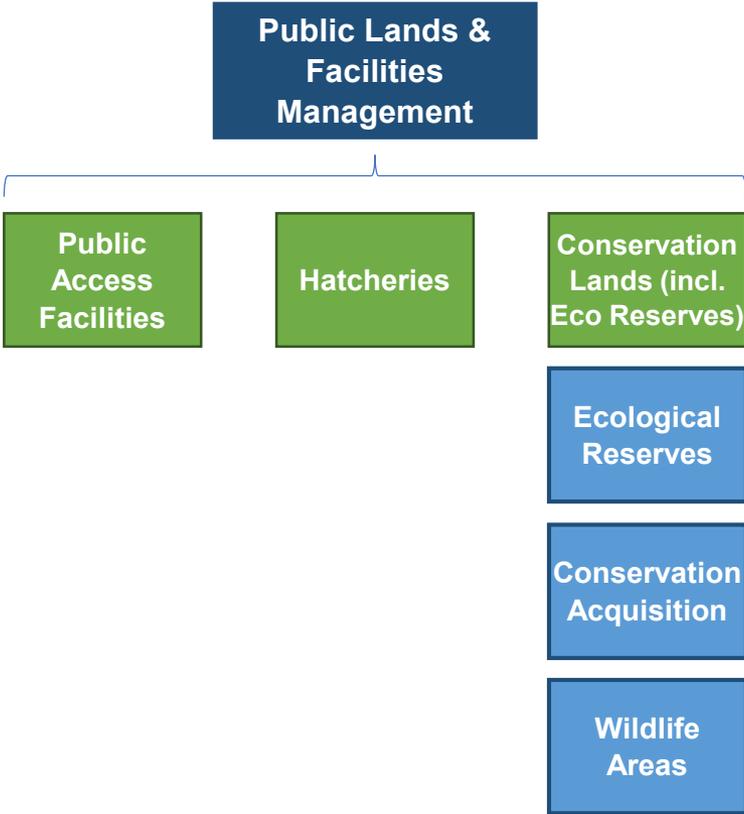
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Public Use & Enjoyment	Species & Habitat Conservation	Public Lands & Facilities Management	Support Services	Communi-cations, Education & Outreach	Permitting & Enviro Protection	Law Enforcement
Recreation (Non-Consumptive)	Species Protection	Public Access Facilities	Species and Habitat Mapping	Communications	Environmental Review	Enforcement
Fishing & Hunting	Habitat & Ecosystem Protection	Hatcheries	IT Operations & Systems	Education	Management & Research Permits	Professional Standards
	Grant Opportunities	Conservation Lands (incl. Eco Reserves)	Engineering	Outreach	Development Permits	Public Safety
			Admin		Oil Spill Prevention & Response	
			Executive			
			Air Services			
			Laboratories			
			Legislative Affairs			
			Legal			

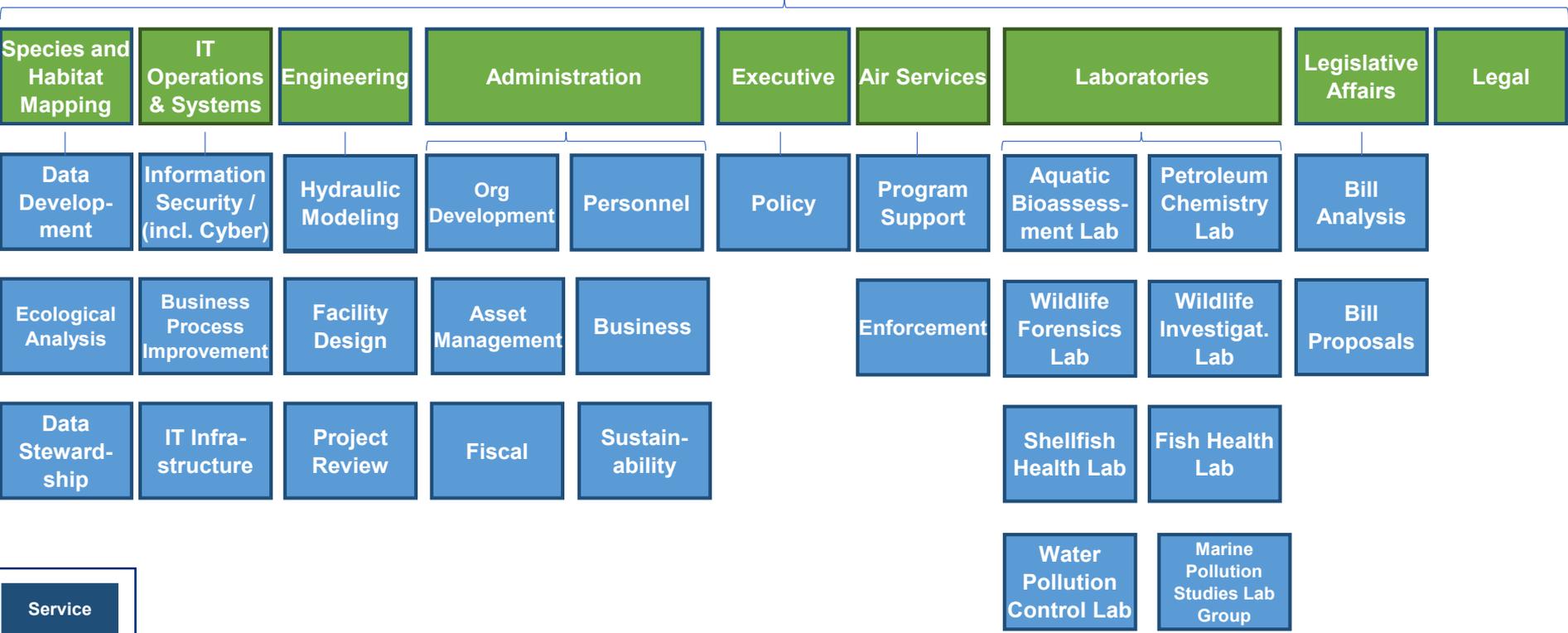


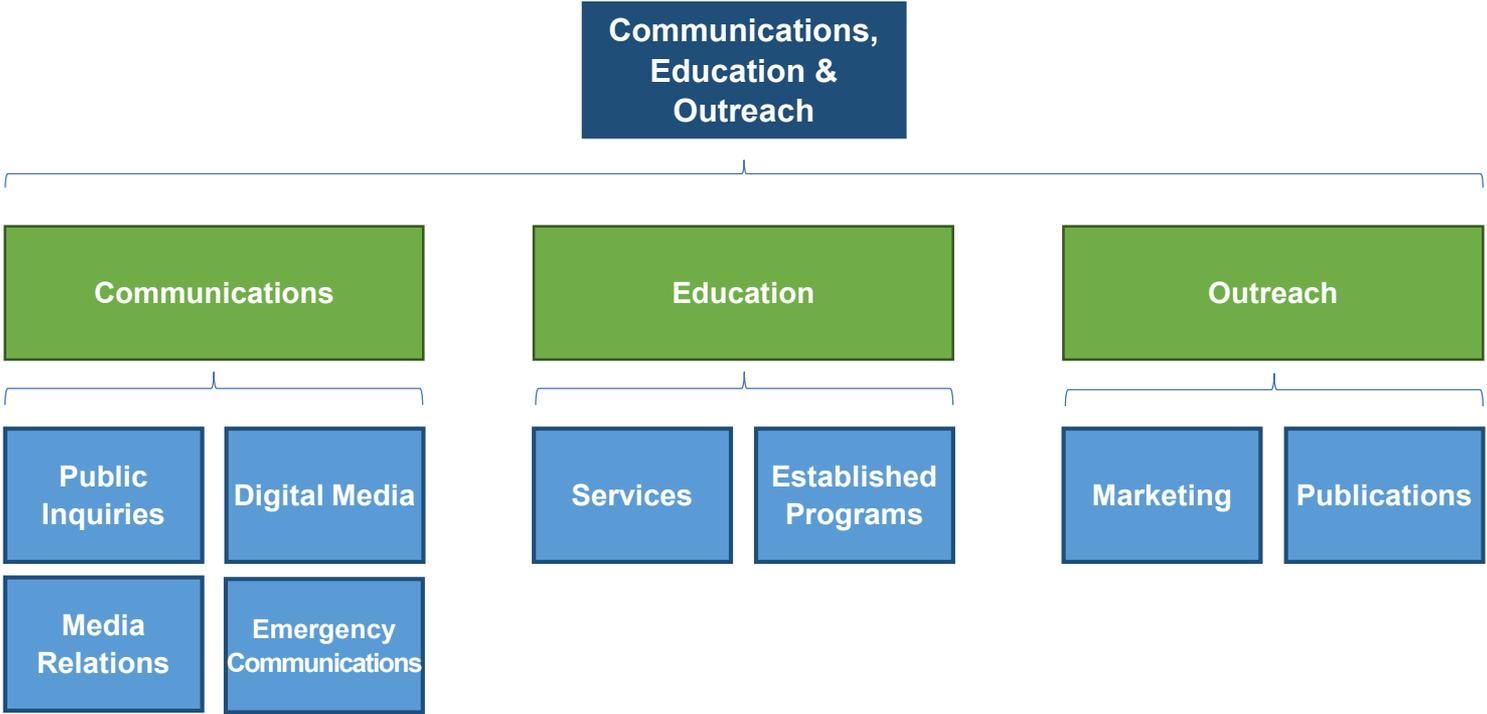




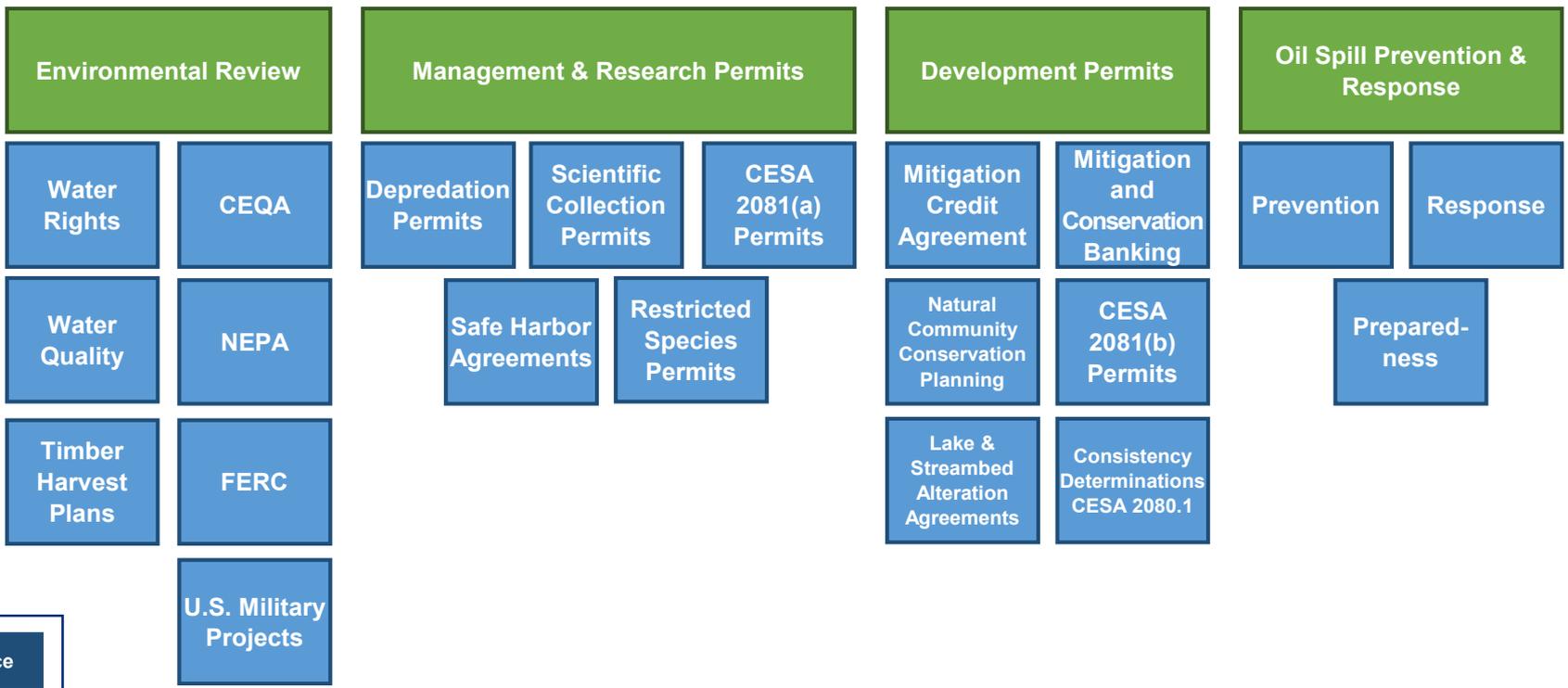


Support Services





Permitting & Environmental Protection





Questions and Feedback

We are committed to communicating transparently about the SBB project. Please contact CDFW with questions or feedback.

Contact Information

- SBB Questions Mailbox:
SBBinfo@wildlife.ca.gov
- SBB Webpage:
<https://www.wildlife.ca.gov/Budget/Service-Based-Budgeting>

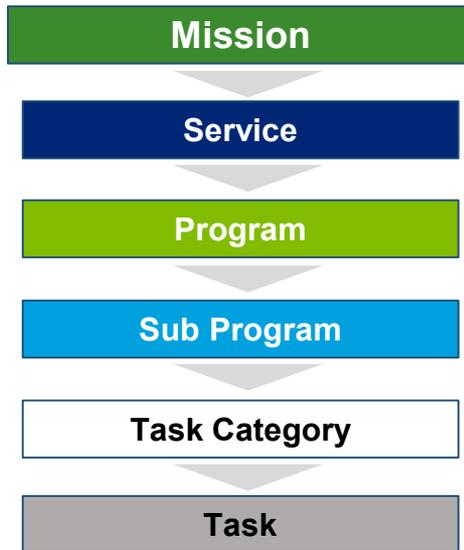
Appendix

SBB Data Will Inform Future Budgeting

Current Phases of SBB Review

*Future Budget Analysis
Informed by SBB Data*

Service Matrix and Task Catalogue Development



Cost Analysis

SBB data will be used by CDFW to determine the labor cost of Department tasks at the current and mission levels of service.



Revenue Source Analysis

The SBB task catalogue will enable the Department to identify existing funding sources supporting particular tasks and gain visibility to tasks that could benefit from a different allowable or more appropriate funding source.



Task Justification

SBB data will provide the justification (i.e., mandate, operational necessity, best practice) for tasks the Department performs.



Service Level Gaps

SBB will identify the gaps between the mission level of service and the current level of service for each task.

Building Upon Mission Based Budgeting

The Mission Based Budgeting effort was an important step towards defining the activities the Department performs. SBB differs from and builds upon this effort in three primary ways.



Public Service Perspective

The SBB methodology is driven by the services we provide to the public **from the lens of the public rather than the internal organizational structure** of the Department (i.e., branches and divisions), which defined the MBB review.



Structured, Hierarchical Analysis

The SBB approach provides a more granular analysis of the Department, supplementing the MBB results with task-level data of services performed, through **a structured Service Hierarchy**.



Labor Hours Visibility

SBB **facilitates the collection of labor hours** desired per task (“Mission level”), and labor hours currently spent per task (“Current level”), providing a clear understanding of where additional funding is needed.

