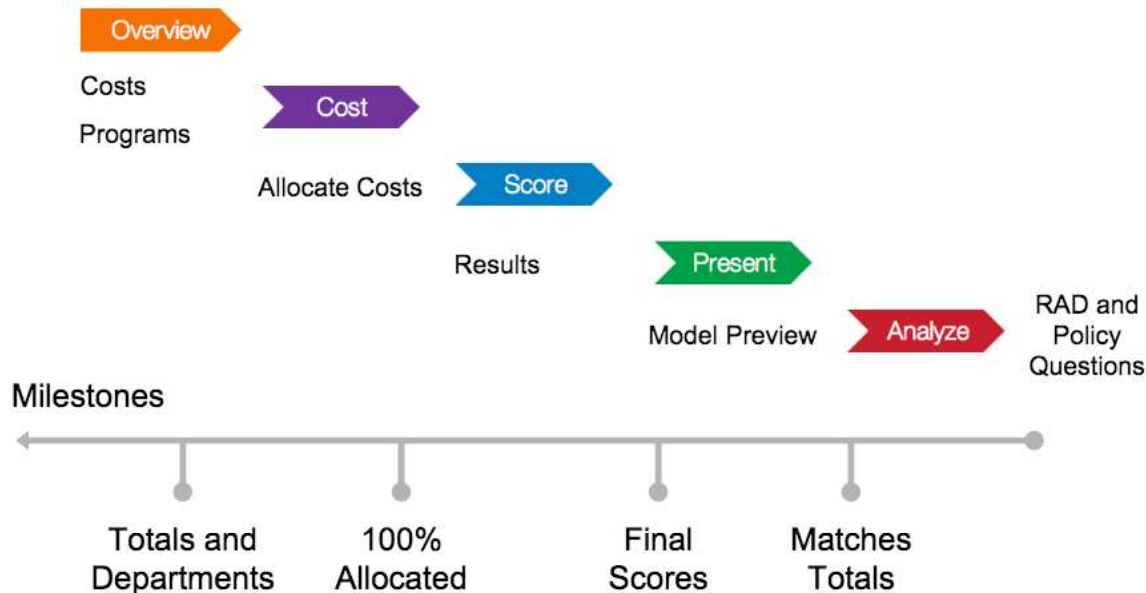


## V. Appendix B: Detailed Implementation Overview

### Overview, Program Inventory and Costs

#### Approach to Implementation, Scope and Timeline

Your implementation process is built around 5 major steps, each with clear milestones along the way.



#### Project Kick-off and Program Inventory Training "Workshop"

Webinar Training: 1-1.5 hours

##### **ResourceX Role and Workload:**

To launch your implementation, ResourceX will provide an initial webinar together with your team, consisting of an overview of the implementation process, in addition to the following key project planning points:

- establish a project timeline
- review the key data we'll collect from your financial system, as well as your personnel system
- clarify the roles and workload of your organization, as well as our role in providing set-up support services

ResourceX provides a "starter program inventory" for the departments to work from and a training on how to identify "programs" at a level most effective for PBB. The "starter program inventory" is built from the PBB Database of over 70,000 programs, customized to match with their department, and significantly easing the workload for departments to complete this first task.

**Super User (PBB Data Officer):** One of the key objectives of our first meeting will be to identify the “Super User(s)” in your organization who will be the primary resource to coordinate with our team for the management of the project. The Super User(s) will gain the benefit of being trained on all aspects of the OnlinePBB software, and achieve mastery of Priority Based Budgeting concepts, sufficient to lead the process in future years.



***Organization 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 Refine Program Inventories**

Departments Given: 1-2 Weeks

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

***Organization Role and Workload:*** Each department will be responsible for refining and completing their Program Inventory and submitting this to ResourceX. Departments are given 1-2 weeks to complete this task, even though the workload anticipated is between 8-16 hours (departments are given extra time, in order to fit this effort in among their normal job duties).

# Program Costing

## Program Costing Workshop

Webinar: 45 mins - 1 hour

**ResourceX Role and Workload:** ResourceX will provide a Program Costing training session to staff who will be responsible for filling in the data into the Program Costing Template. ResourceX 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.

**Organization 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: 1-3 Weeks

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

**Organization Role and Workload:** Those who are involved in the task of completing Program Costing are given anywhere from 1 to 3 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.

## Program Scoring

### Priorities Identification Workshop

Online, via web-workshop: 1-2 hours

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

**Organization 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").

### Priorities Definition Workshop

Online, via web-workshop: 1-2 hours

**ResourceX Role and Workload:** ResourceX launches an online exercise typically through a web-based 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 Priorities. ResourceX leads the workshop, addressing each Result, one-by-one, soliciting feedback from the participants which form the basis for the creation of Results Definitions. Staff are given several weeks after the launch of the exercise to contribute responses, that ResourceX ultimately synthesizes for use in Results Definitions.

**Organization Role and Workload:** Department heads, and key City staff who participate in the Results Definition Workshop should anticipate spending 1-2 hours of their time, over the course of several weeks as the exercise is openly available on-line, to complete this exercise.

## Department Program Scoring Workshop

Webinar: 1-1.5 hours

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

**Organization 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

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

**Organization 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.

## Peer Review Workshop

Webinar: 1-1.5 hours

**ResourceX Role and Workload:** ResourceX will provide a Peer Review training session for those who are participating on Peer Review teams. ResourceX 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).

**Organization 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

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

**Organization 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).

## Determine Final Program Scores, Quartile Rankings

ResourceX Given: 1-2 Days

**ResourceX Role and Workload:** ResourceX applies it's 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." ResourceX will begin the process of loading this information into the City's final Resource Alignment Diagnostic Tool (the final deliverable of implementation).

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

## Present (Model Preview)

### Create PBB Model: Resource Alignment Diagnostic Tool

ResourceX Given: 1-2 Days

**ResourceX Role and Workload:** ResourceX 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.

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

### Provide Model "Preview" to Executive Team

Webinar 1-1.5 hours

**ResourceX Role and Workload:** As soon as the Resource Alignment Diagnostic Tool is completed, ResourceX 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 The City Council. Typically this gives the City staff first opportunity to review the data and ensure it's appropriate for presenting the information further.

**Organization Role and Workload:** City staff will be asked to reflect on the presentation of the initial Resource Alignment Diagnostic Tool, and provide feedback to ResourceX 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

Webinar 1-1.5 hours

**ResourceX Role and Workload:** There are various options open to the City in terms of presenting the final Resource Alignment Diagnostic Tool to elected officials. ResourceX 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.

**Organization Role and Workload:** City staff will be asked to strategize with ResourceX 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, how to incorporate the information into the City's budget process, and how to communicate the data to the public/community (if desired).

## Project Timeline Summary

*\*Your organization's timeline for implementation is in your control. ResourceX will help you design your timeline to meet the needs of the organization. Overall, the PBB process can be completed in a 3-month period, from beginning to end.. If you have a more pressing need to implement PBB in less time, please let us know and our team will help design a path that will accommodate your schedule.*

Milestone	Days
<b>Overview</b>	<b>14</b>
<b>Cost</b>	<b>16</b>
<b>Score</b>	<b>27</b>
<b>Present</b>	<b>7</b>
<b>Analyze</b>	<b>1</b>

