

PBB Implementation Project Charter

This document serves as a **communication tool** to help you articulate your organization's PBB goals. It also provides a place to plan and mitigate for challenges and outline a communications and engagement plan.

Goals	
Short Term (1 Year or less) PBB Goal(s):	• Establish communication and educate project stakeholders (internal, elected, public); • Develop citywide support and understanding of the PBBi process; • 100% participation and utilization from all departments • Identify all programs and services that the City provides; • Understand where the City is allocating its resources and how that aligns with the City's strategic plan; • Develop program insights • Take initial steps to realign resources to support City Council's priorities;
Long Term (3-5 Years) PBBi Goal:	• Change the way people think about budgeting; shift mindset to make decisions based on priorities of entire City, not just one department. • Achieve a clear understanding and documentation of the City's programs and related resources; • Fully align funding priorities with programs and services that further the City Council's strategic priorities; • Create partnerships to provide programs more effectively and efficiently; • Be adept at realigning resources in times of fiscal challenge; • Assess the program effectiveness through performance measures; • Develop department/division level KPIs to track program success • Consider inclusion of CIP budget
Success Looks Like:	• Transparency on allocation of resources based on the who, what, where, and why; • We know what we do, why we do it, and how much it costs; • We know how to fiscally adjust as needed while minimizing the impact on the most critical programs and services; • We are effective at communicating these aspects; • Improved efficiencies in city operations; cross-departmental functions; elimination of duplicate



	programs and services; partnerships in program delivery; • Strategic goals and performance targets are achieved. • Culture that embraces the interconnectivity of strategic planning, organizational performance and resource alignment • City Manager guides strategic planning and PBBi processes prior to each budget development
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Desired Action to Achieve Goal(s)	
Vision for Taking Action on the Data:	• Communicating each step of the way • Celebrating success throughout the process • Plan for partnerships; new/revamped programs; budget direction; • PBB is a plan to financially manage provision of services to the community; • PBB helps the City Council determine priorities for funding; • PBB provides greater transparency in the allocation of financial resources to programs; • PBB identifies areas for cost savings, and where additional funding is needed to ensure successful performance of programs; • PBB provides accountability by staff to electeds and the community; • Inclusion in KPI/metrics for strategic plan
Area(s) to Apply PBBi Data:	• Performance measures • Budget • ROI/Program value

Scope & Deliverables	
Scope of Project:	• Citywide, all funds; • Assignment of FY 2020/21 operating revenues, expenditures and positions to programs • Develop insights for FY 2021/22 budget planning; use insights for budget development
Expected Final Deliverable:	• PBBi Present site; • PBBi blueprint: action items for FY 2021/22 budget development



Challenges and Mitigation Plan	
Potential Challenges:	• Lack of stamina • Lack of interest • Department silos • Fear of losing funding • Unwillingness to recognize programs that aren't consistent with Council priorities • This could take substantial staff time to develop the program budget and determine financial costs associated. Are there sufficient staff resources to take this on during the COVID pandemic? • How do we confirm accuracy of program budget in order to avoid potential increased program costs later? Public disclaimer? • How to evaluate program performance to facilitate data-based decision-making • How to ensure all programs are accounted for and properly defined to ensure clear understanding. • How to address funding for "special project" requests from City Council and CMO.
Plan to Mitigate Challenges:	• Choose enthusiastic team members • Well-defined structure for progress • Hold team members and departments accountable for their success • Escalate issues as needed to department heads and/or CMO team as needed • Training • Ongoing Communication • Incremental change

Engagement and Communication	
Outline how you plan to engage with and communicate PBBi to the following audiences:	
Internal Organization:	• PBBi Executive Team: As needed • ELT Team: Standard meeting update • Super Users Team: Standing weekly meetings • Department Users Teams: Standing weekly meetings ○ Hold Dept users accountable for regular updates to and engagement with their dept heads. • All Employees ○ Overview video ○ Digital distribution via exchange, intranet ○ Communication to Field Crews ○ Q&A submission form
Elected Officials:	• Financial Performance & Budget Committee • Forward to Council as directed ○ Standing update at Council meeting ○ Overview Video ○ Do we present alongside strategic plan?
Citizens:	• Budget Engagement Commission • Tie public engagement to budget process; strategic planning process. • What is a priority-based budget? What does that mean for me? • Overview Video; website • Celebrate small milestones, little wins

Roles and Responsibilities for Project	
Team Members Responsible for Each Project Milestone:	• Identify Department Users – ELT • Project Charter – Core Team • Budget Upload – Kristie Thomas • Peer Review Team Selection? • User Groups Assigned? • Strategic Plan approved – Donna Finch • Program Inventory – Department Users • Cost Allocation Complete – All • Program Scoring Complete – All • Peer Review Complete – Super Users/Peer Review Team • Insights for Action – Department Users • PBBi Blueprint Workshop – ResourceX
How will the team make decisions?	• Core Team is primary decision-making body • Core Team will make recommendations to Executive Team as needed