



Sunset Review

Park and Recreation Board Briefing
December 1, 2016



Dallas Sunset Review

- While the name Sunset Review may imply a goal of “sun-setting” or eliminating a department or program, that is not intent of review
- As outlined by CMO in June 2014, Sunset Review is for purpose of conducting additional analysis of departmental budgets
 - Intent is to take a “deep dive” into department budget and operations
 - To identify opportunities to improve operational efficiency and effectiveness
 - To identify opportunities to have a positive budget impact through expense reductions or revenue increases
- Dallas process is based on department self-evaluation report and review by an objective team

Dallas Sunset Review – Schedule

FY15	FY16	FY17	FY18	FY19
Police	Equipment and Building Services	Fire-Rescue	Mayor and City Council	Aviation
Courts	Public Works	Cultural Affairs and WRR	City Auditor	Economic Development
Judiciary	Street Services	Library	City Manager	Housing
City Attorney	Trinity Watershed and Storm Water	Park and Recreation	City Secretary	Fair Housing
Code Compliance	Environmental Quality	Civil Service	City Controller	Planning and Urban Design
Emergency Management	Sanitation	Human Resources (and Employee Benefits)	Communication and Information Services	Sustainable Develop. and Construction
311 Operations	Water Utilities	City Attorney	Financial Services	Convention Center
			Purchasing	Risk Management
			Public Information	Intergovernmental Services

Dallas Sunset Process – Timeline

Date	Activity
Sept 30	Announcement sent to seven departments
Oct 20-21	Kick-off meetings
Sept 30 to Dec 2	Departments complete self-evaluation reports
Dec 2	Departmental self-evaluation reports due to Office of Financial Services
Dec 9	Kick-off meeting with review teams
Dec 9 to Feb 3	Teams review self-evaluation reports, hold follow-up meetings with departments, and conduct research while making observations and identifying potential opportunities
Feb 6 to Mar 3	OFS to meet with department directors to review observations and potential opportunities
Mar 6 to Apr 7	CMO briefed on self-evaluation reports and team review
April to June	Brief committees on potential opportunities



Self-Evaluation Report

- Most important to Sunset Review process is complete, accurate, and thoughtful self-evaluation report which must include following sections, and answer questions and provide information detailed on following slides
 - 1) Purpose and activities
 - 2) Source of funds and revenues
 - 3) Expenditures
 - 4) Personnel
 - 5) Performance
 - 6) Stakeholders
 - 7) Technology and equipment
 - 8) Other



Self-Evaluation Report

- Department self-evaluation report is more than compiling information for review teams to consider
- Self-evaluation report is intended to be time/process for departments to consider operations and activities
 - And ask questions about why activities are provided, are goals being met, is there a better way to deliver the service, is there a duplication of service delivery, etc.
- Self-evaluation report format is provided and must be completed by each department participating in review process



Self-Evaluation Report: Purpose and Activities

- Provide an overview of department's purpose, mission, and objectives
- Provide hierarchy of how department is divided and subdivided into functions, programs, services, and activities and provide a detailed description of each
- Explain why each activity (at lowest level) is needed and what harm would come from no longer performing activity
- Identify partners (ie. other agencies, MOUs, ILAs) involved in completing work
- Describe activities currently outsourced, and identify others that could be
- Describe opportunities to improve delivery of service and activity
 - No "sacred cows", a fresh look and new ideas are encouraged



Self-Evaluation Report: Source of Funds and Revenue

- Provide detail of how department is funded, not just general fund, but also grants, gifts, etc.
- For non-general fund sources provide description and eligible uses of funds
- Provide detail on all revenue of department
- Provide budget versus actual comparison of revenues for FY14, FY15, and FY16
- Provide detail on all charges or fees assessed by department including authority for which charge/fee is assessed and methodology for determining revenue, purpose of charge/fee, and date of last fee study



Self-Evaluation Report: Expenditures

- Explain how functions, programs, services, and activities relate to fund/unit as recorded in accounting system
 - Show how units roll-up into services as listed in FY16 budget
- Provide budget versus actual comparison for each fund/unit expenditure at object code level for FY14, FY15, and FY16
 - Include at unit level, roll up to services, and summarized for department
- For each object code with smaller of 5% or \$200,000 variance, provide explanation
- Provide list of all current goods/services contracts or master agreements including purpose of contract, scope of work and annual expenditure of contract
- Provide detail for all reimbursements received by department



Self-Evaluation Report: Personnel

- Provide current org chart with all positions and indicate if filled or vacant
- Provide list of authorized position in department, if funded or not funded, if filled or vacant, and salary information
 - For each vacant position, indicate date position was last filled and salary assigned to position
- Provide budget versus actual FTEs for FY14, FY15, and FY16
 - Include for unit, service, and department
- Provide detail and list of all temporary, contract, or day labor personnel and how they are utilized in department




Self-Evaluation Report: Performance

- Explain how department defines success, effectiveness, and efficiency, and how each is measured
- Provide budget/target versus actual performance measures for FY14, FY15, and FY16
- Provide not only performance measures used in budget document but also other measures maintained by department
- Indicate measures that are used for other department initiatives such as ICMA, professional organizations, etc.
- Explain how department and/or services compare to national/professional standards, industry leaders, comparison cities, certifying agencies, etc.
- Identify best practices for activities provided by department
- Identify obstacles that interfere with service delivery
- Identify areas for improvement – what activities are most time consuming, cause most headaches, receive most complaints, least cost effective, etc.



Self-Evaluation Report: Stakeholders

- Identify stakeholders of department including boards/commission, interest groups, volunteer organizations, etc.
- Explain how stakeholders participate in department and/or services
- Explain how department gauges customer satisfaction
- Provide report of any stakeholder or customer surveys or feedback that has been obtained
- Provide report of complaints received



Self-Evaluation Report: Technology and Equipment

- Identify major IT systems, equipment, and fleet used by department
- Include department owned, EBS/CIS owned, and rented or leased items
- Explain how they are used in performing activities of department
- Identify improvements or updates needed to improve efficiency or effectiveness



Self-Evaluation Report: Other

- Provide copy of recent audits, studies, and/or performance reports completed
- If ISO certified, provide copy of management review documents and internal/external audits
- Identify all locations within City where department operates and explain functions/activities occurring at each location
- Submit SWOT analysis completed for department business plan

FY16 Sunset Review Teams

	Fire	Park & Rec	Library	OCA & WRR	Civil Services	Human Resources
OFS Budget Manager & Analyst						
Human Resources						
CIS						
Assistant Director						
Assistant Director						
Strategic Customer Service						
Other						
Dept. Rep.						



Considerations by Review Team

- Based on components presented to Council and criteria used in state process, following are areas that teams will review:
 - 1) What is purpose of department?
 - 2) How does department contribute to achieving mission and goals of City?
 - 3) How does department meet legal requirements and/or mandates?
 - 4) What are appropriate measures of success for department?
 - 5) Is department effective and meeting performance measures?
 - 6) Are there opportunities to improve performance?
 - 7) Are there opportunities to streamline or improve efficiencies?
 - 8) Is department responsive to customer needs?
 - 9) Are all services, activities and line item expenditures needed?
 - 10) Are all staff/positions needed?
 - 11) What is appropriate span of control?



Considerations by Review Team

- Review team will identify potential opportunities to improve services, improve efficiencies, increase revenues, and/or cut costs
 - Team members will make observations
 - Team members will identify potential opportunities
- Council members have verbally expressed desire to have cost reductions from the sunset process
- Template for team member reviews will be provided at time of review team kick-off



Q & A