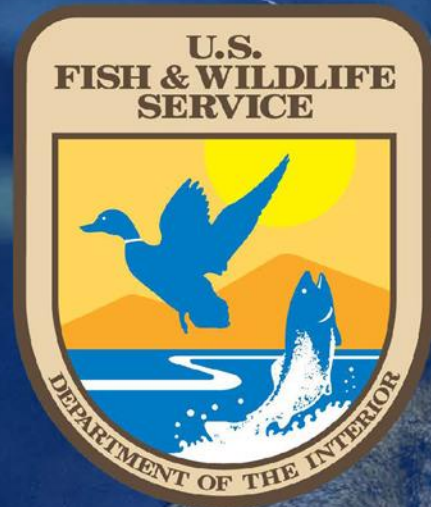


Project Jaguar



THE
JANDOR
GROUP

Phase 1 Report – June 25, 2024

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Introduction to Project Jaguar



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The four Stage Gates of Project Jaguar



November 2023

Project management foundations set

Infrastructure built to set up Project Jaguar for executional success



January 2024

Current state opportunity identified

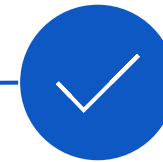
Assessment of IA permitting process and organization identifies opportunities through alleviation of “frictions”



March 2024

Future state org and process designed

Prioritize opportunities by impact/value and ease of implementation/effort



April 2024

Future state recommendations delivered

Outline roadmap and risks to implement opportunities for IA



Who is The Jandor Group?

The Jandor Group (TJG) is committed to being the most **client-focused**, **reliable**, and **mission-driven consulting firm**. We partner with our clients to understand their goals and challenges, using our expertise, tools, and methodologies to help them reach their full potential. Our core values are rooted in extensive research on what drives long-term organizational success, growth, sustainability, and inclusivity.

Our People



Our Work

TJG Serves

- Service-Disabled Veteran Owned Small Business
- Army, Navy, and Air Force veterans
- Bronze Star Medal recipient
- Army commendation
- Active duty military spouses






TJG Delivers with experience from organizations including:



TJG Gives Back (Veteran Services Organization)



Project Jaguar charter

The team's mission	Coordinate domestic and international efforts to protect, restore, and enhance the world's diverse wildlife and their habitats with a focus on species of international concern	
How project supports	Look at the IA permitting program holistically by reviewing the current permits program administration workload and its current approach and processes for administering the permitting program, staffing model, efficiencies, other non-permitting responsibilities of the permitting staff	
In scope	<ul style="list-style-type: none"> • Find proactive solutions to address increasing workload, maximize conservation outcomes of our investments, and identify pressing challenges and opportunities • Find efficiencies in regulatory permitting processes in accordance with applicable laws, regulations, and policy • Analyze current organizational structure and identify resources to strategically advocate for future investments • Plan and facilitate organizational change • Engage internal and external stakeholders (permit applicants) to ensure all relevant input is captured and analyzed 	<ul style="list-style-type: none"> • Analyze FWS teams outside of IA • Optimize processes outside of permitting and application • Detailed forecasting for IA permits
Work-streams	<div data-bbox="522 956 904 1013">  Project Management </div> <div data-bbox="267 1063 573 1149">  Org Model </div> <div data-bbox="611 1063 930 1149">  Permitting </div> <div data-bbox="968 1063 1274 1149">  Application </div> <div data-bbox="471 1185 955 1242">  Communications and Change </div>	<ul style="list-style-type: none"> • Timeliness of receiving PIV cards, impacting project timeline to access and analyze data • FWS operations exceed current process capacity, due to additional disruption from Project Jaguar

Out of scope

Initial risks



Project Jaguar success pillars and considerations, addressed through Phase 1 approach and recommendations

People

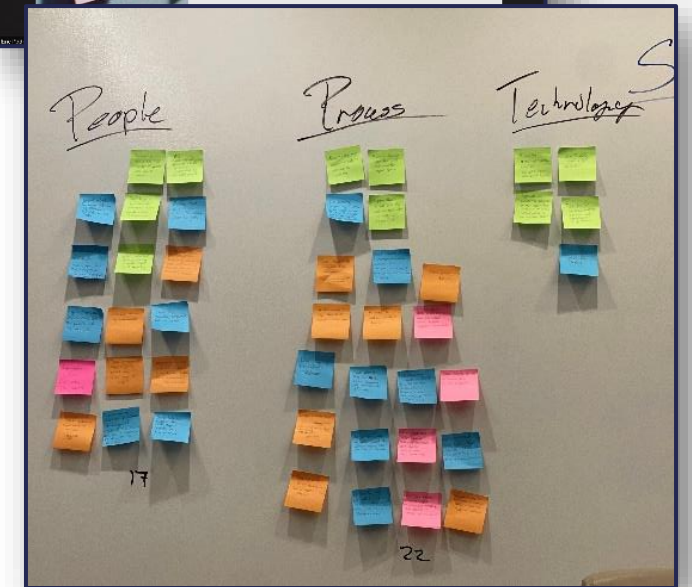
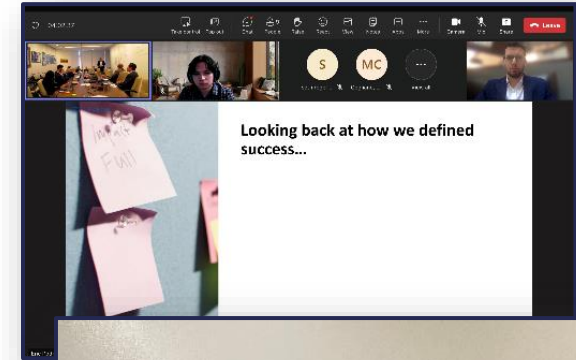
- DOI, Congress, and the Public understand the huge positive economic impact of IA permitting
- Customer service to stakeholders
- Efficient with FWS Lead and Support time, so they have reasonable workload and maintain balance life-work balance
- Actionable recommendations within resource constraints
- External stakeholders to be and feel engaged and heard
- Staff and permit program team feel empowered, motivated & in-control
- Continued, high engagement with the staff
- Leadership to understand the permitting program's needs and resources and will provide full capacity support
- Service leadership supports the next steps in tangible ways

Process

- Built in decision trees that avoid the need for expert opinion
- Streamlined system that prevents large backlogs
- IA staff to be able to spend their time and talent on the highest conservation priorities
- Clear, tangible actions to improve the IA permit program
- Once issued, permits should be easily understood by law enforcement
- Permitting programs to be viewed as one of 3 or 4 tangible pillars that agency does for conservation
- Communication plan that minimizes calls from applicants
- Solid data-driven recommendations that can be implemented without additional funding
- Reduced external phone calls
- A plan to address backlog in processing

Technology

- User-friendly interface for the public
- Systems that minimizes the need for applicants to call for assistance
- Single data entry across system(s)
- Real-time, online application tracking capability for applicants
- Less complicated permits with no special handling requirements to be prioritized for digitization (to be done electronically)
- ePermits should be a resource to help the agency achieve its goals



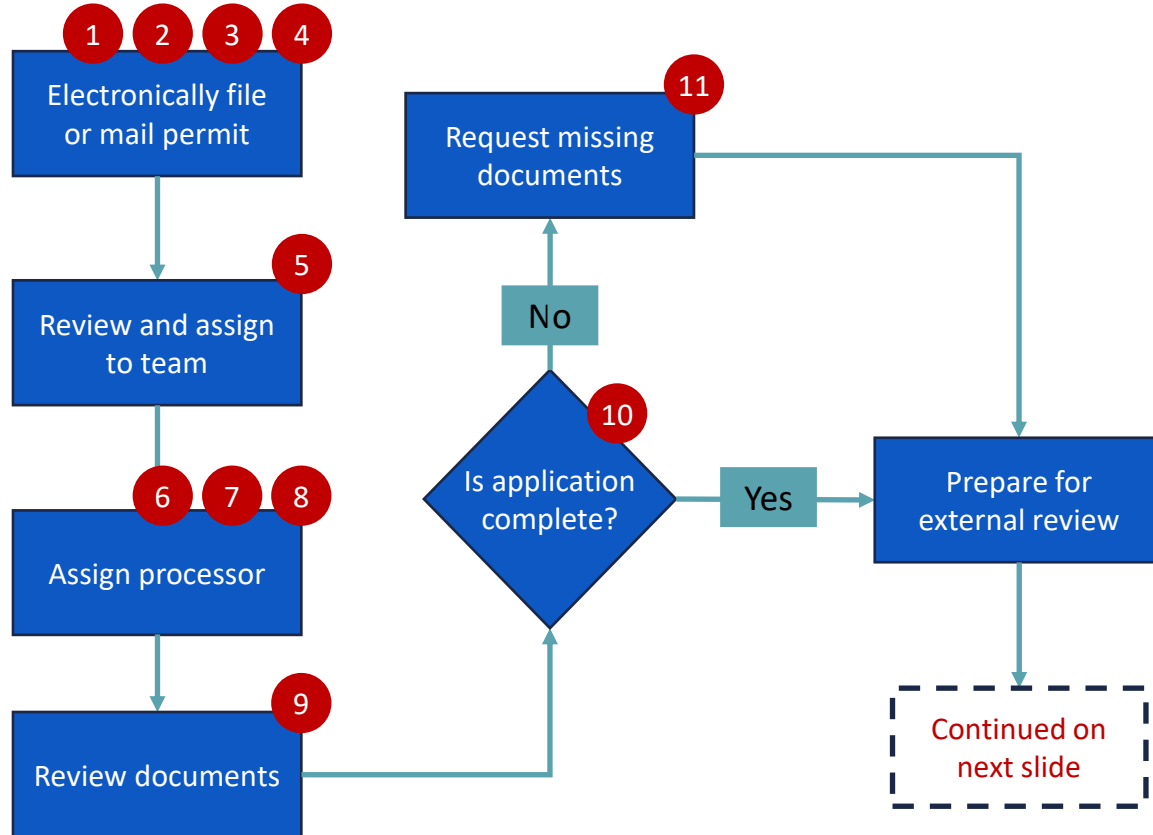
Current assessment



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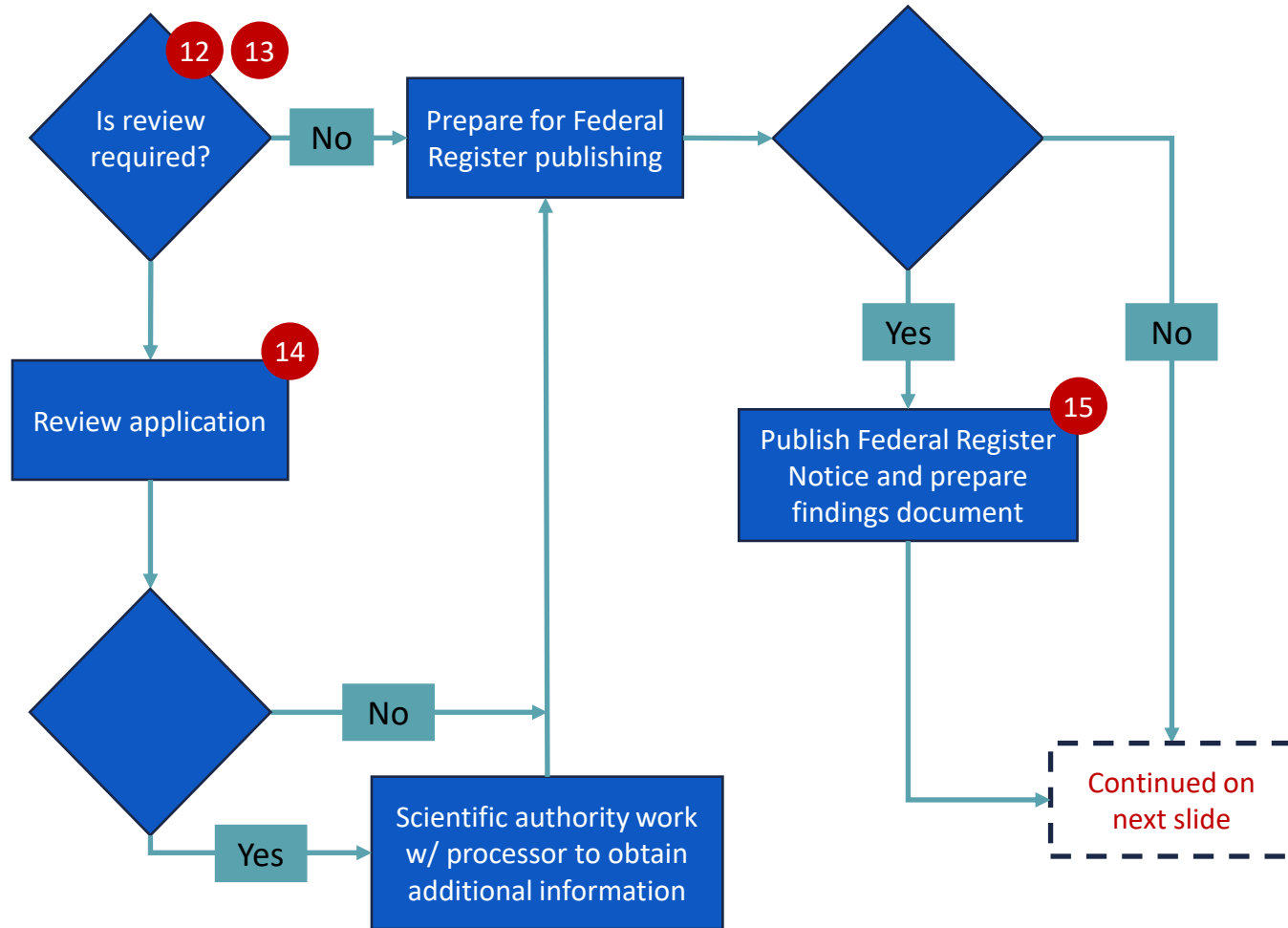
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Process pain points were identified in the Project Jaguar kickoff workshop (1 of 3)



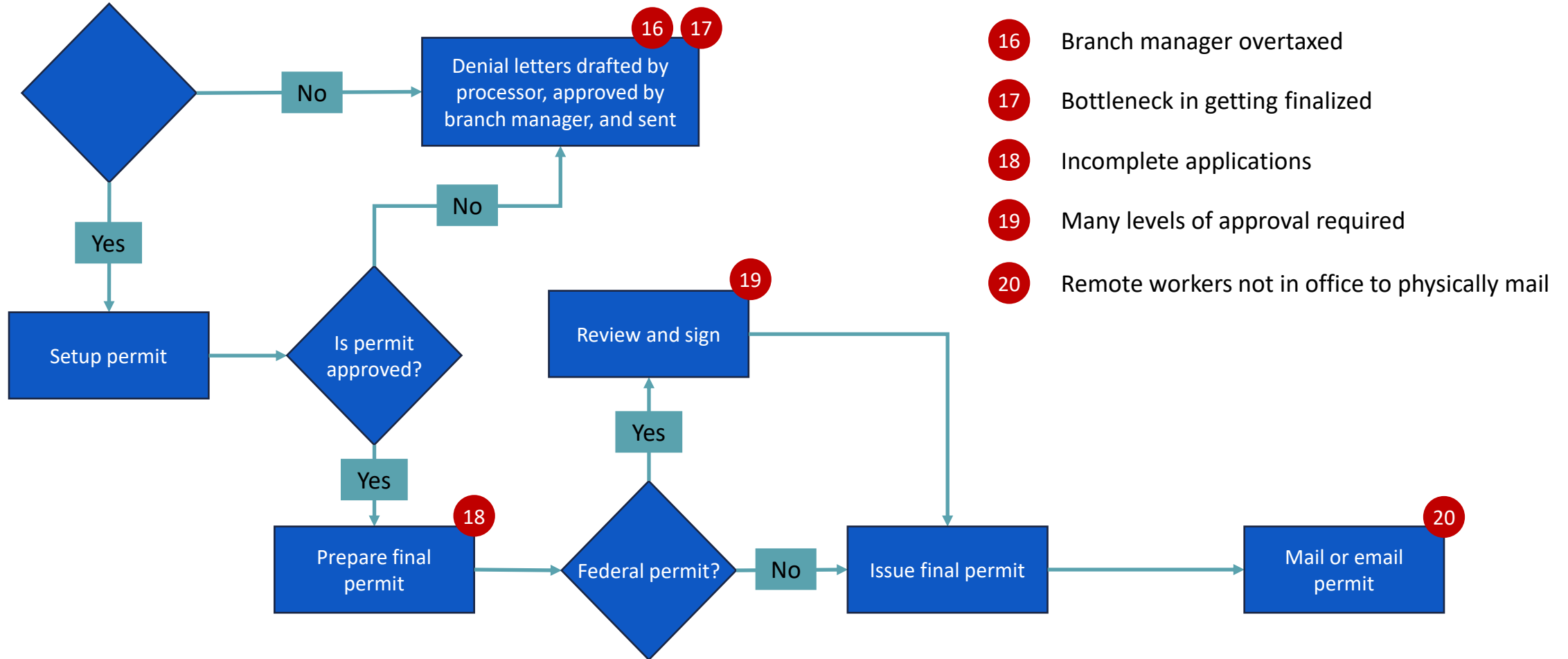
- 1 No dedicated customer support for applicant
- 2 Paper-based processes
- 3 Fee payment complexity
- 4 Forms made to meet multiple needs creates complexity
- 5 No back-filling positions
- 6 Amendments after submission
- 7 Status inquiries while awaiting review
- 8 FIFO policy
- 9 Document translation
- 10 Incomplete applications
- 11 Lack of response from applicant

Process pain points were identified in the Project Jaguar kickoff workshop (2 of 3)

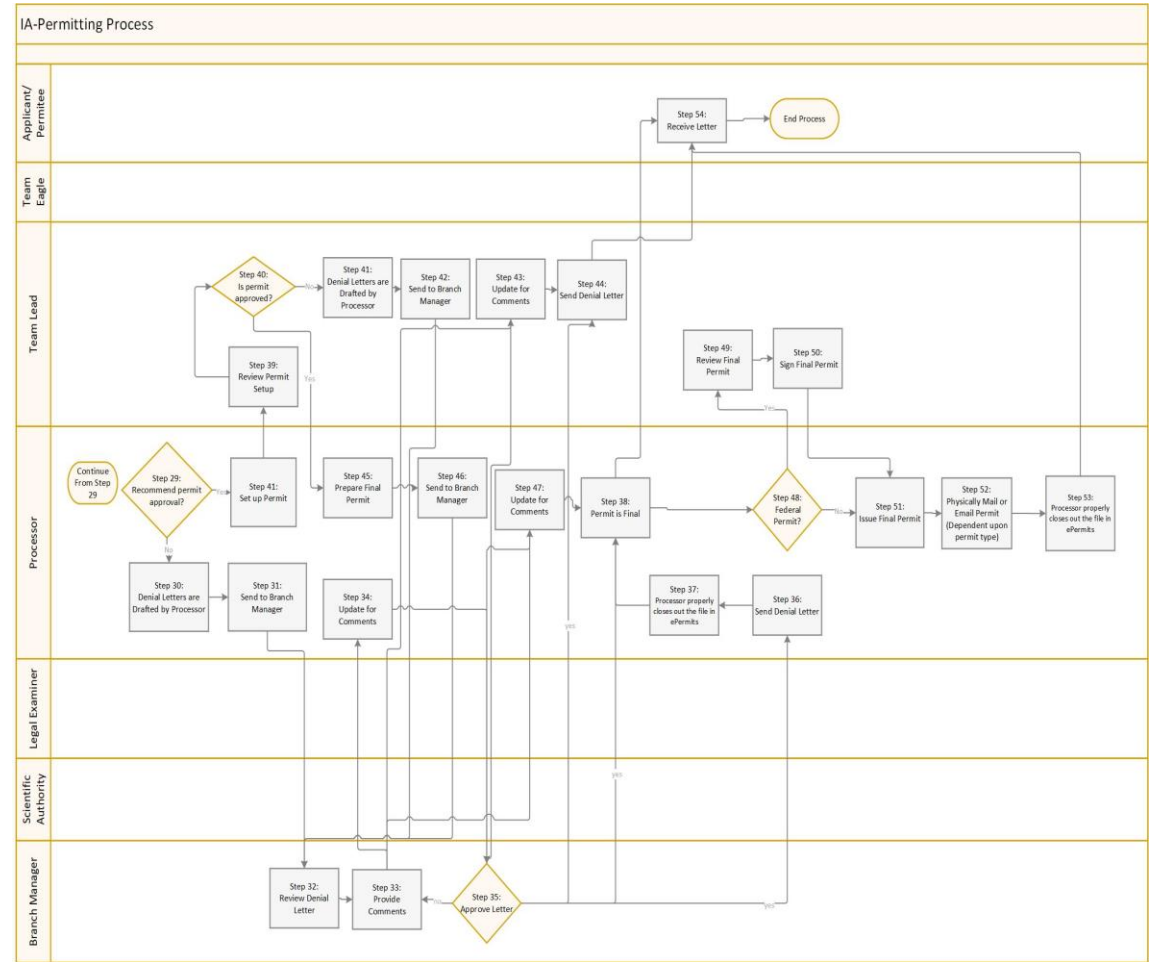
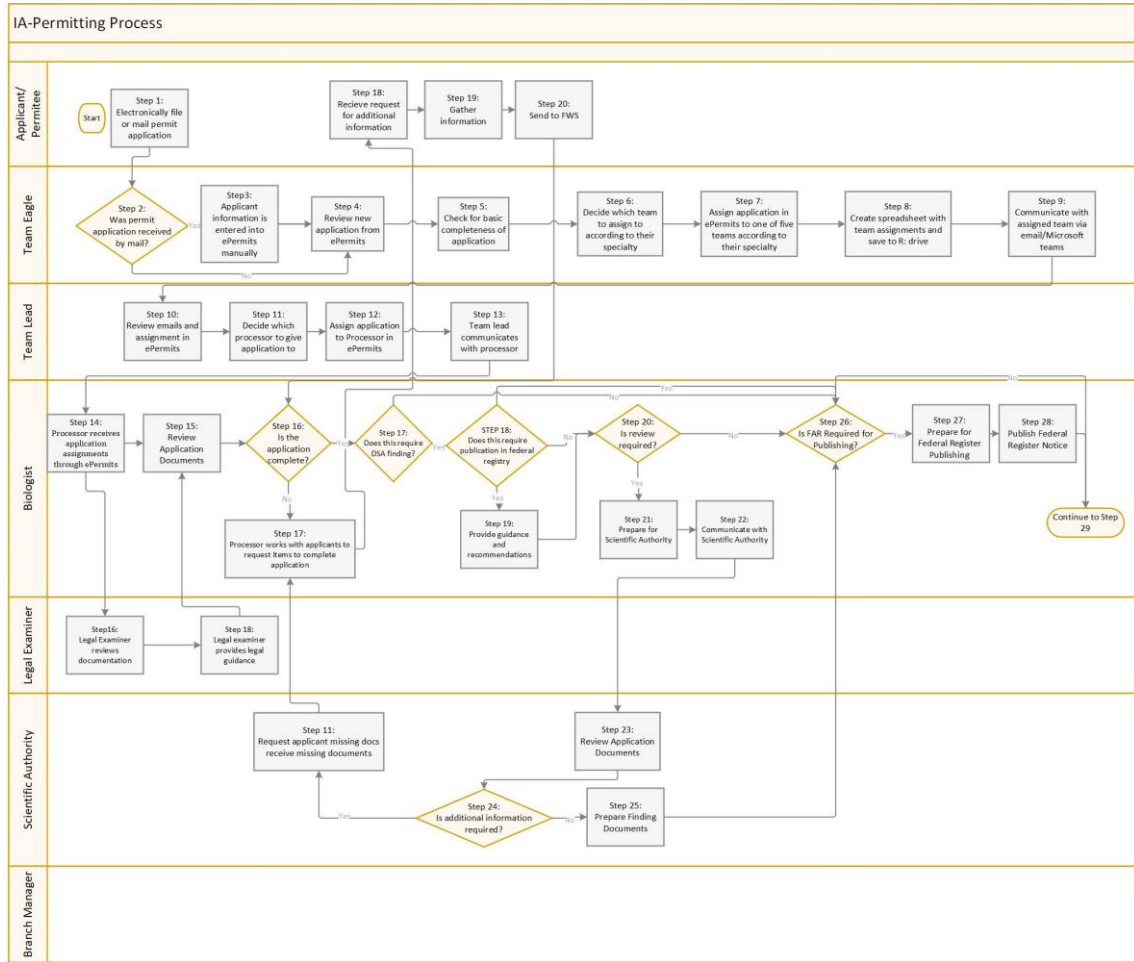


- 12 Bottleneck – incomplete application impacts DSA ability to review
- 13 Applicants demoralized by lack of response
- 14 [needs clarification]
- 15 [needs clarification]
- * Process rooted in 1970s legal requirements & thinking
- * FWS allows too many exceptions
- * Need guidelines on what information may be divulged to customers

Process pain points were identified in the Project Jaguar kickoff workshop (3 of 3)



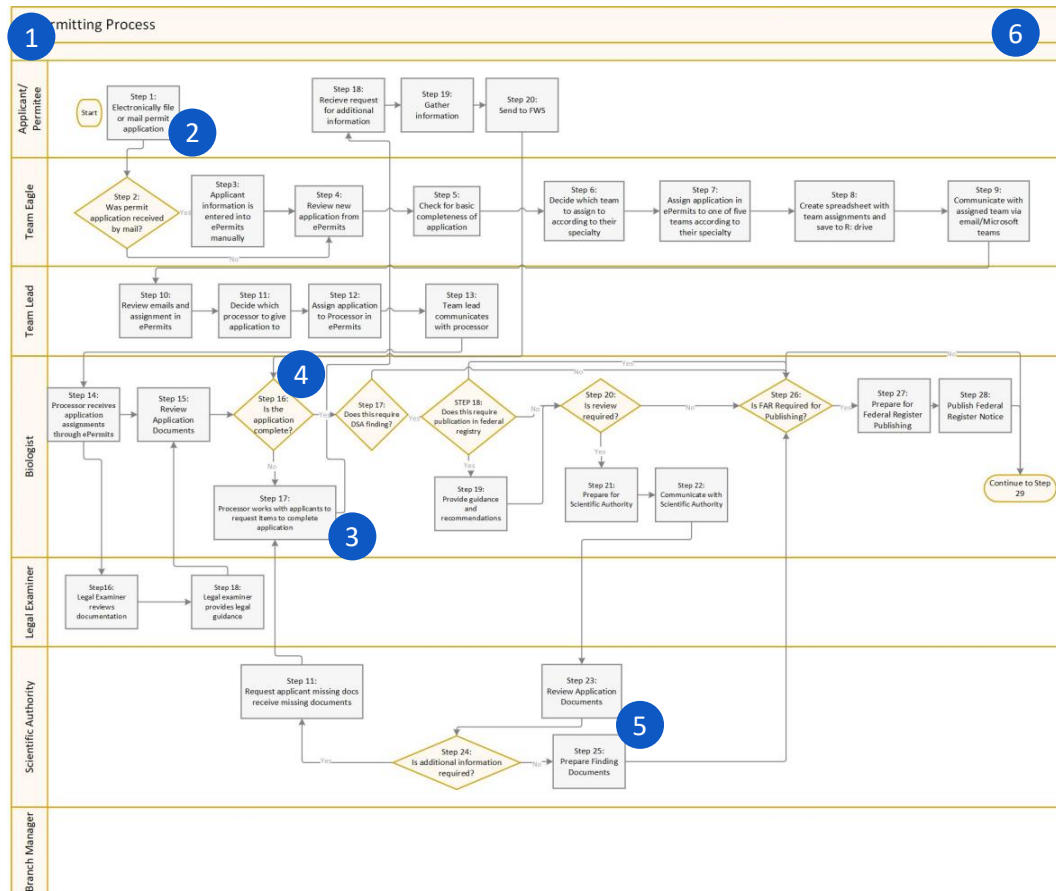
Current state permitting process



Six observations found in submission, processing, and findings are captured in current state process map (1 of 2)

Current IA permitting process

Observations

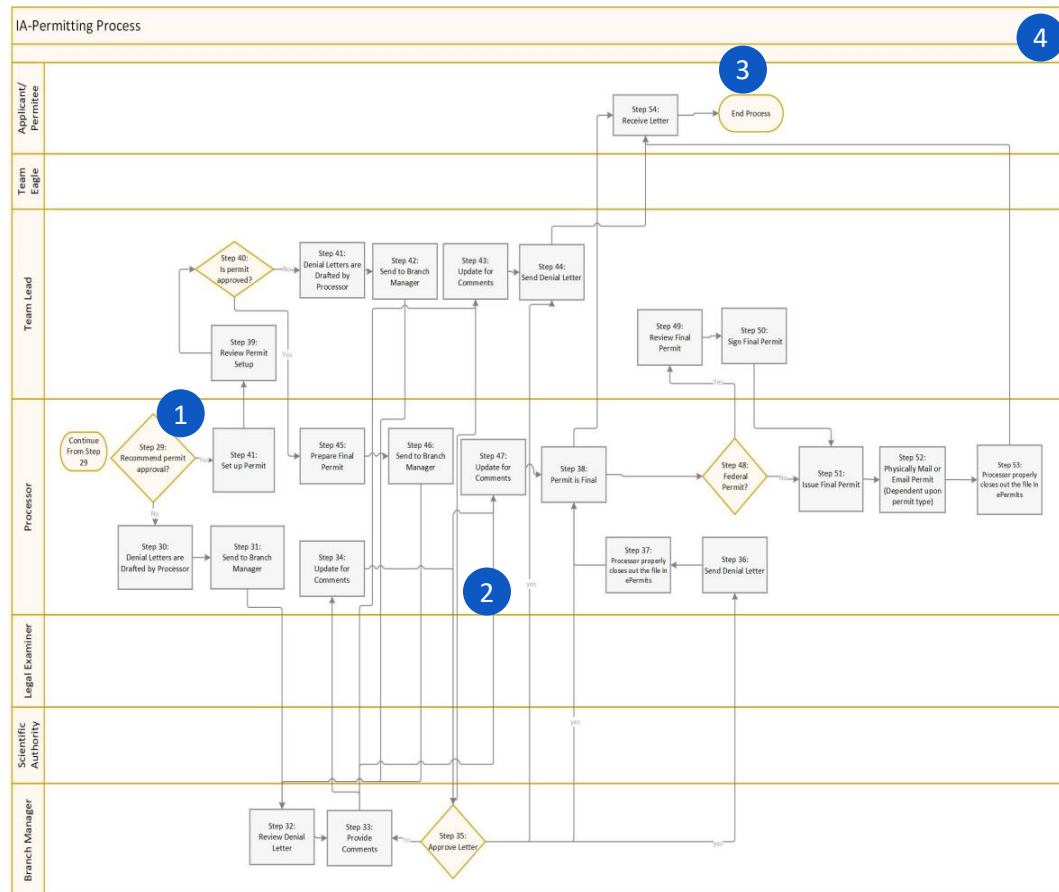


- 1 89 steps required to complete IA permitting process loop¹
- 2 Applications are currently allowed to be submitted with incomplete or missing information
- 3 DSA works through DMA to obtain information from permittees and applicants causing delays and miscommunication
- 4 DMA is required to conduct manual review for additional customer input
- 5 No acceptable centralized repository of prior, common findings
- 6 Process variation exists between teams, processors, and scientists

Four observations found in approval and finalization are captured in current state process map (2 of 2)

Current IA permitting process

Observations



- 1 Multiple steps included in approval and denial process, no standard approval process across teams
- 2 Complex review process that incorporates multiple reviews and people with manual routing of information
- 3 Minimal reporting and tracking of permits, and formal deadlines are often unclear or not followed
- 4 Process variation exists between teams, processors, and scientists

The RACI is an industry standard framework to define roles in organizational processes

Responsible, Accountable, Consulted, Informed (RACI)

	<u>Responsible</u>	<u>Accountable</u>	<u>Consulted</u>	<u>Informed</u>
Definition	Bears direct responsibility for performing and successfully completing a certain task/process	Signs off on the completion of certain task/process on time while meeting quality standards	Possesses ability and knowledge to provide input for work being performed prior to being completed and signed off	Updated on progress or decisions, but not contributing directly to the task or decision
Best practice	Multiple 'R's can exist across the same activity to build process efficacy	One 'A' per activity optimizes for process efficiency	No more than two 'C's ensures timely path to decisions	No more than 20% 'I's contributes to organizational buy-in and reduction of non-value add activities

Source: TJG



Current IA permitting process RACI

Process Steps	Applicant/ Permittee	Team Eagle Lead	Permits Biologist	Legal Instr. Examiner	Team Lead	BoP Mgr	DMA Head	Biologist/ Botanist	Branch Manager	DSA Head
Submit Application	R A	I	I	I	I	I- if denied	--	--	--	--
Assign Team	--	R	I	I	I	A	--	--	--	--
Assign Processor	--	I	I	I	R	A	--	--	--	--
Review Application	--	R	R	R	A	A I	--	R – If finding	R C	--
FR Notices	C	I ¹	C	--	I	A	R	--	--	--
Provide Permit Findings	--	--	R C	--	A	A	A	R	R A	A
Determine Permit Approval	--	--	R	--	A	A – If denied	A ²	I – If denied	I – If denied	I – If denied
Mail Letters to Applicants	I	--	R	--	I	A	A	--	--	--

Commentary

- 1 Multiple parties are required to manually review applications
- 2 Process steps have multiple accountable parties

1. Team Eagle is responsible for drafting the FAR and getting it through the surname process; 2. If permit reconsideration request is made
Source: Stakeholder interviews



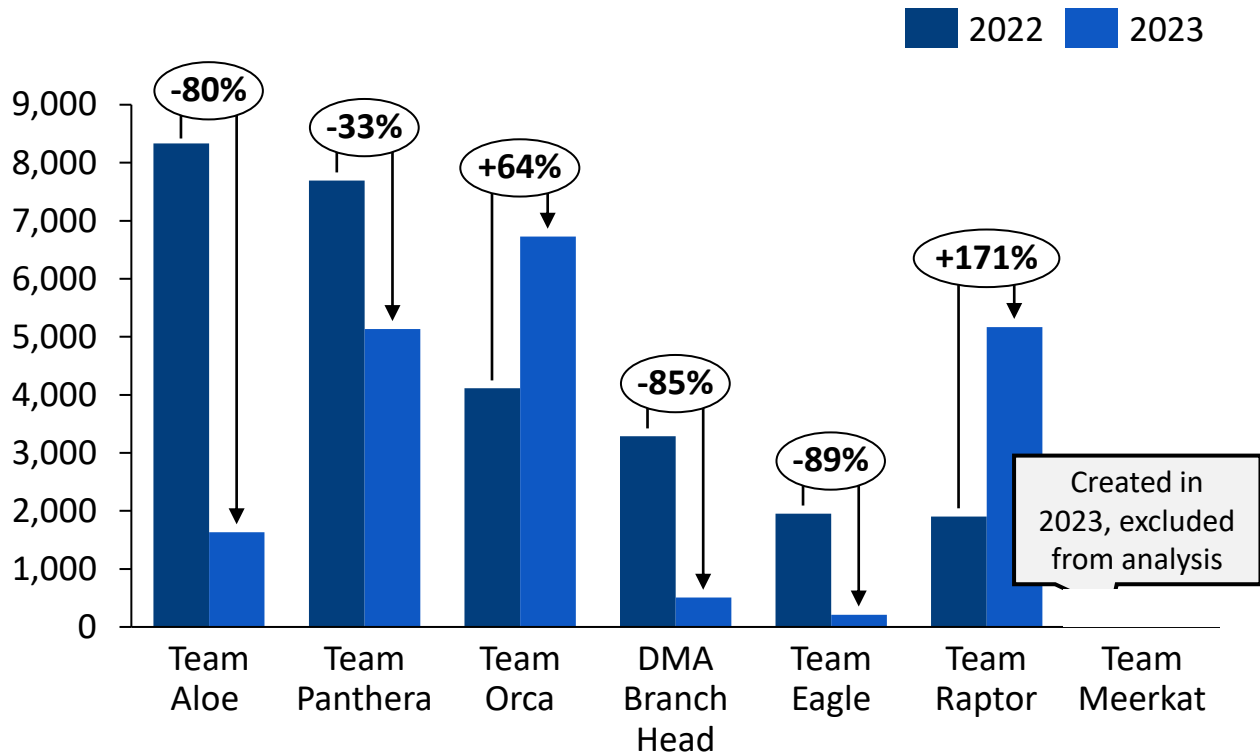
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Quantity of permits closed varied widely across and within teams

Permits processed by team, permits only
count of permits closed



Source: ePermits

Commentary

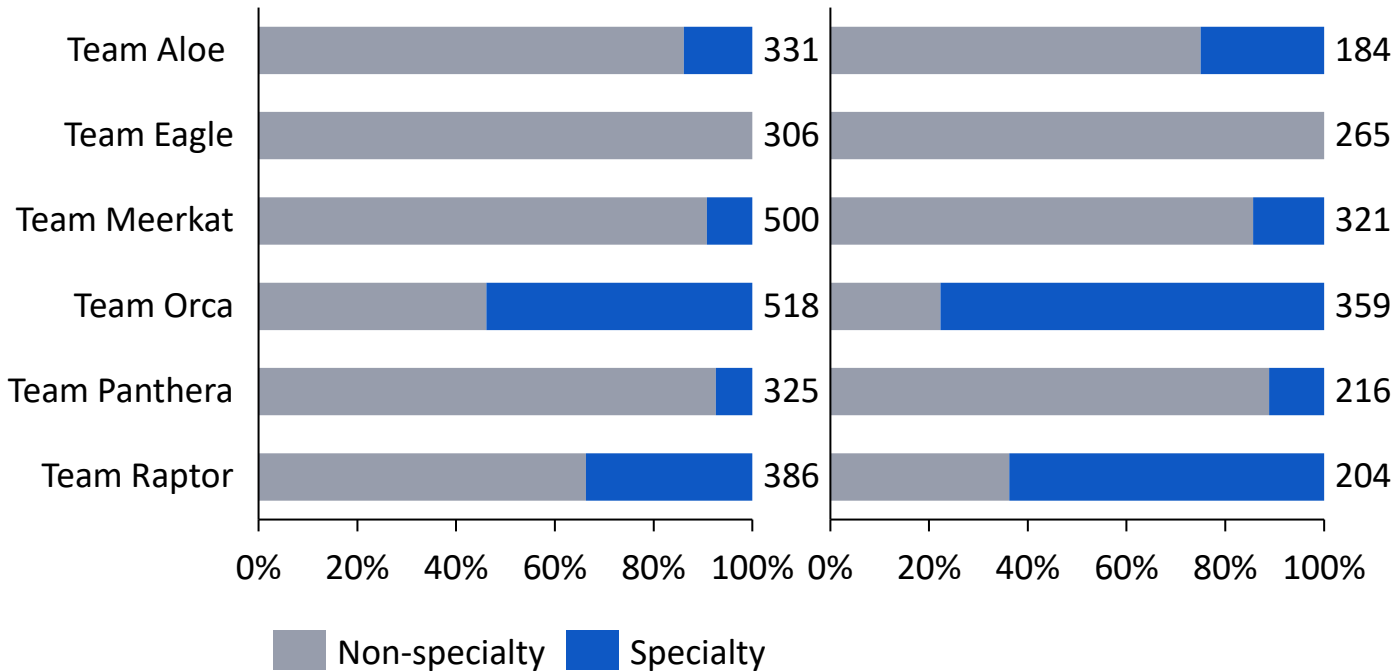
- **Team Raptor nearly tripled the amount of permits** closed in 2023 compared to year prior
- **Conversely, Team Aloe closed 80% less permits** in 2023 compared to year prior

Further clarification commentary

- This graph includes the number of processed clone permits, which make up most of the permits issued by the Branch each year. These permits can be done in "batches", meaning that many permits may be issued from a single application. In 2023, additional LIE positions were filled to review these and other less complex applications. These LIEs were spread across teams, thereby reducing the numbers on teams which had historically reviewed more clones (Aloe, Panthera) and increasing them on teams which had historically reviewed fewer (Orca, Panthera)
- Across teams, we see that Aloe and Panthera are being assigned significantly fewer applications in 2024 compared to 2023, while the remaining teams either remained the same or increased. This is likely because of the unequal distribution of "specialty" applications across teams. Specifically, the creation of Team Meerkat in 2023 allowed general application types to be assigned which would have previously gone to Aloe or Panthera

Specialty application distribution is not equal across teams; additional resources may be necessary to reduce review times

Application distribution by team, 2024
Percentage of specialty vs. non-specialty



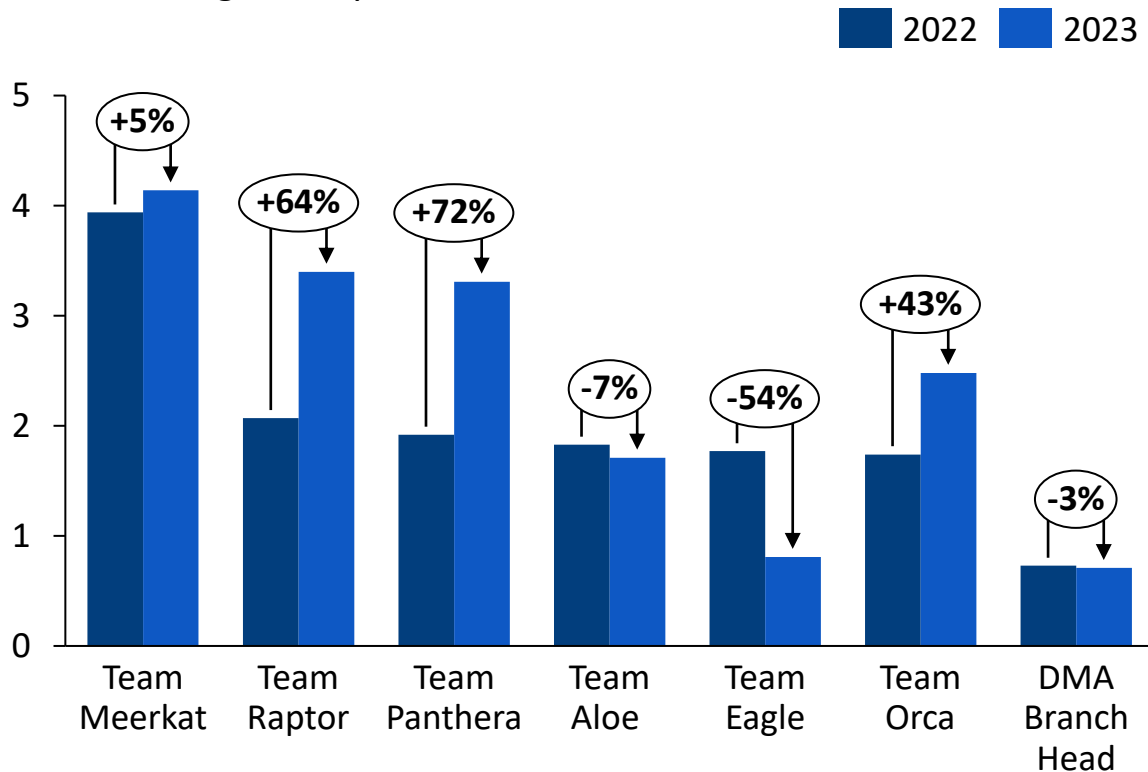
Source: ePermits

Commentary

- The distribution of “specialized” applications across teams is unequal
 - These application types are generally more complex and take more time to complete
 - **Specialty applications cannot easily be re-assigned**, whereas non-specialty applications can be re-assigned depending on a team’s workload and other factors

Teams with the highest increase in permit reassignments also saw increases in time from opened to closed

Average number of reassignments by team, permits only
times assigned in process



Source: ePermits

Commentary

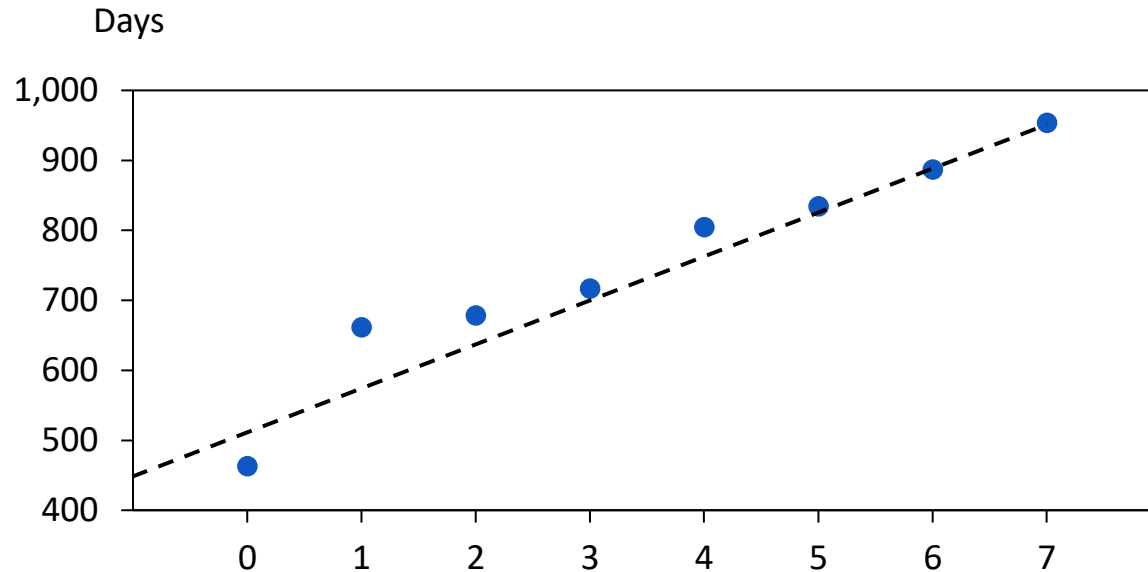
- Number of reassignments within the process increased by **72%, 64% and 43%** for Team Panthera, Raptor, and Orca, respectively
 - This may have contributed to increase in processing time of 27%, 32%, and 19%, respectively
 - What are the drivers of reassignments for permits versus applications (e.g., when employees leaves the position)? Who can they be reassigned to, and is internal stakeholders only?

Further clarification commentary

- Re-assignments are a symptom of the actual problems which include staff movement, workload management, species protection changes, etc.

Permit reassignments are strongly correlated with time from opened to closed

Average processing time, permits only, 2022-2023
days from opened to closed per reassignment



Permit count	0	1	2	3	4	5	6	7
	10,597	9,345	10,098	10,809	4,049	2,770	1,709	101

Source: ePermits

Commentary

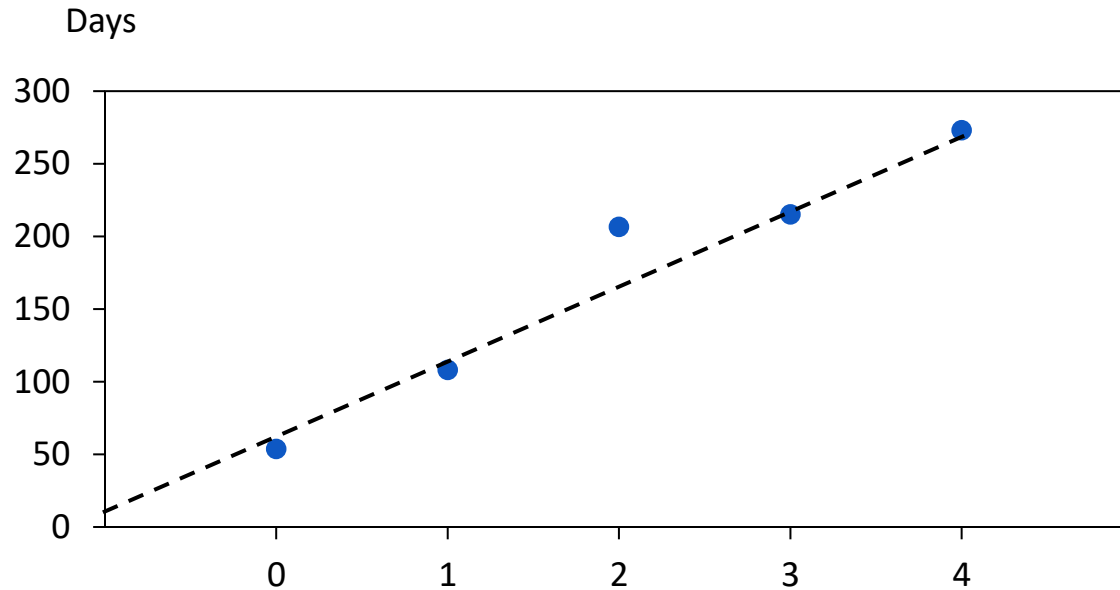
- **Each process reassignment is correlated with ~61 additional days of processing time**
- **Number of permit reassignments appears to have strong correlation ($R^2 = 0.93$) with the days from opened to closed within the process**
 - Has a similar initiative been implemented previously?
 - Is there a way to reduce the number of reassignments per permit?

No. of reassignments

Multiple factors impact number of reassignments, including biologists moving roles and volume of permits assigned

Time from opened to closed seems to be similarly correlated with application reassignments

Average processing time, applications only, 2022-2023
days from opened to closed per reassignment



Commentary

- **Number of application reassignments also appears to have strong correlation ($R^2 = 0.95$) with the days from opened to closed**
- **Each application reassignment is correlated with ~54 additional days of processing time**

No. of reassignments

Application count	0	1	2	3	4
	217	3,034	1,116	229	79

Source: ePermits

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Evaluate organizational model current state through three different assessment areas

TJG approach to organizational model current state assessment

Assessment area

Roles

Assess the type, the quantity, and the variety of roles the current organizational model has

Levels

Evaluate the different performance levels the current organizational model has and their proportions to each other

Responsibilities

Establish and examine the stated, official responsibilities team members currently have compared to they actually are performing

Assessment drivers

Interviews	-	-	✓
PD analysis	-	✓	✓
Org. Charts	✓	✓	-
TJG perspective ¹	✓	✓	✓

- In-depth assessment of the current organizational structure
- List of challenges with the existing organizational model
- Potential solutions to address existing challenges and the increasing workload, while maximizing conservation outcomes

1. TJG perspective refers to benchmarks, best practices, and research

Initial observations suggests that IA has an organizational structure that is a mix of various ones

Example organizational structures (non-exhaustive)

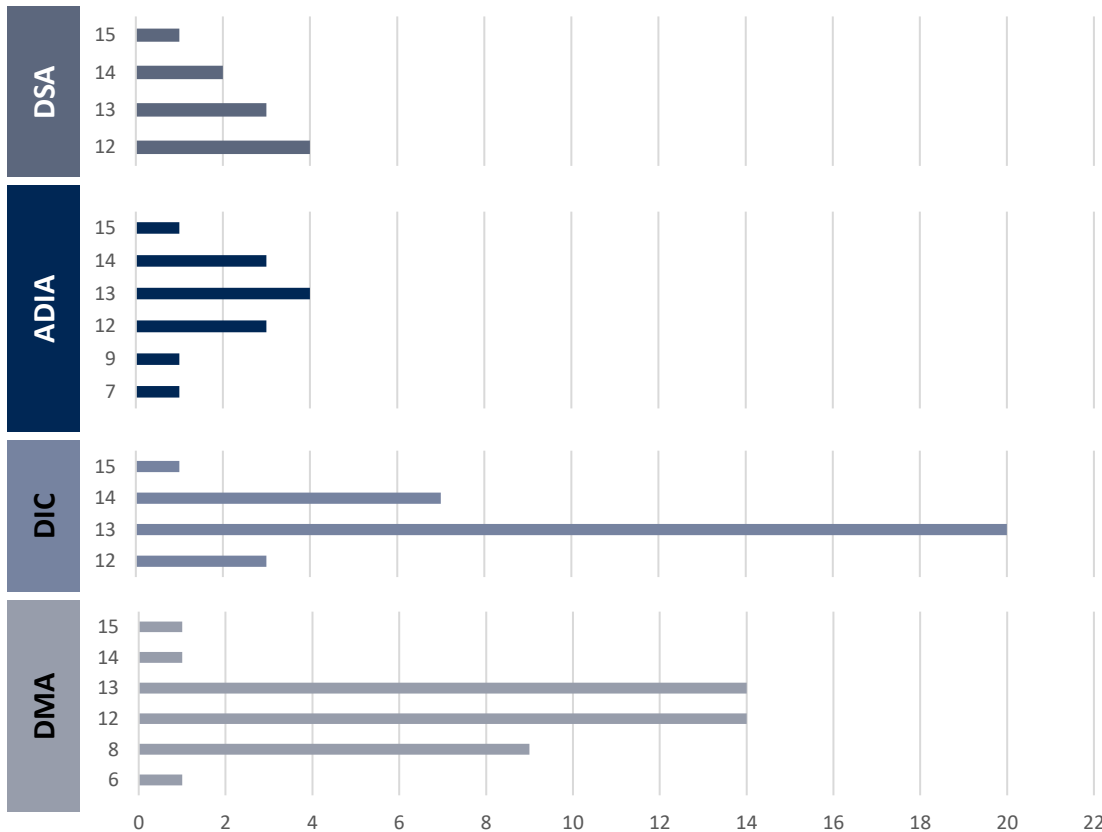
	✓ Hierarchy	✓ Function	Product	Process	Geography
Def.	<ul style="list-style-type: none"> A pyramid-shaped org structure with a top-down chain of command, with each employee having an advisor 	<ul style="list-style-type: none"> A pyramid type of org structure where employees are grouped based on specific skills 	<ul style="list-style-type: none"> Teams are organized based on product lines with different support teams assigned for each product line 	<ul style="list-style-type: none"> Teams are structured by steps of a process, with each step having a supervisor & employees 	<ul style="list-style-type: none"> Teams are organized based on geographies / regions with different support teams assigned for each geography
Pros	<ul style="list-style-type: none"> High clarity of roles & responsibilities Clear career path Inclination for specialty 	<ul style="list-style-type: none"> Increased focus on role & specialization Scalable org structure 	<ul style="list-style-type: none"> Faster response to changes in the market Allows for flexibility in approach to different products 	<ul style="list-style-type: none"> Faster and more efficient processes Higher team-work attitude 	<ul style="list-style-type: none"> Faster response to changes within a market Allows customization of approach based on markets' dynamics
Cons	<ul style="list-style-type: none"> Increased bureaucracy leading to slow changes Higher interest in own dept. vs. overall org. Potentially less ownership at lower levels 	<ul style="list-style-type: none"> Siloed teams Conflicting strategies among different markets Less optimal overall organizational strategy 	<ul style="list-style-type: none"> Potential effort duplications Potential competition within a company 	<ul style="list-style-type: none"> Potential barriers amongst teams Siloed teams might lead to miscommunication 	<ul style="list-style-type: none"> Potential effort duplications Increased customization may lead to inefficiencies

Source: TJG's Analysis; Lit. Search; Org Structure PDFs provided by FWS; PDs provided by Herman Reed

✓ IA has aspects of the org. structure

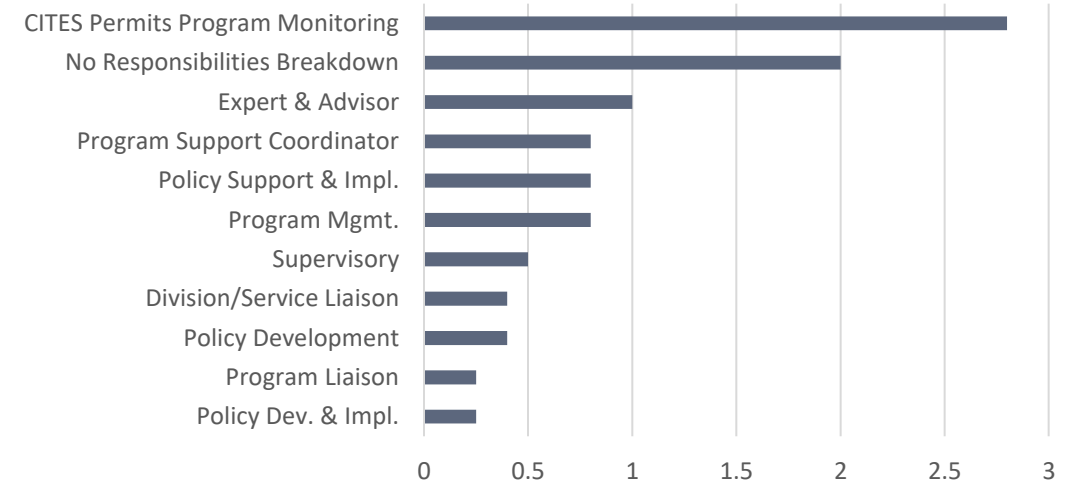
IA divisions appear to be structured with varying degrees of performance levels distribution

Employee distribution by division and performance level¹



1. DMA: Division of Management Authority; DIC: Division of International Conservation; ADIA: Assistant-Director International Affairs; DSA: Division of Scientific Authority
Source: Org Structure PDFs provided by FWS; PDs provided by Herman Reed;

DSA FTE by responsibility (example)



- Select key responsibilities, such as Policy Development, have less than 1 FTE allocated
- 2 FTEs do not have breakdown of responsibilities
- Select Divisions appear to have more concentration of FTEs on the higher end of performance level

DMA | Responsibilities are to be grouped together to best assess activities across roles

Aligned with FWS Org Structure team leads on November 17th

Dimension/ Category	Responsibilities
Clerical & Admin	Records Management, Office Automation, Clerical, Finance and other administrative duties, Special Projects and assignments, FOIA and Records Management Oversight
Advisory	-
Analysis & Technical & Findings	Policy Technical Expert, Technical Expert & Advisor
Coordination	Branch Liaison, Division / Service Liaison, Freedom of info Action
Permit	Permit processing support, Permits Correspondence, Processing, and Program management support, ePermit Development, Coordination, and Collaboration, IA Staff User Support and Training, Responding to Public Inquiries and customer service, Reviewing and processing applications, Processing incoming main and initial evaluation
Policy	Policy Development and Implementation, Permit Policy Interpretation and Implementation, Policy and goal development, Policy development and implementation
Program Management	Program Management, Project Management
Supervisory	Supervisory, Supervisory and staff management



Source: Org Structure PDFs provided by FWS; PDs provided by Herman Reed;

DSA | Responsibilities are to be grouped together to best assess activities across roles

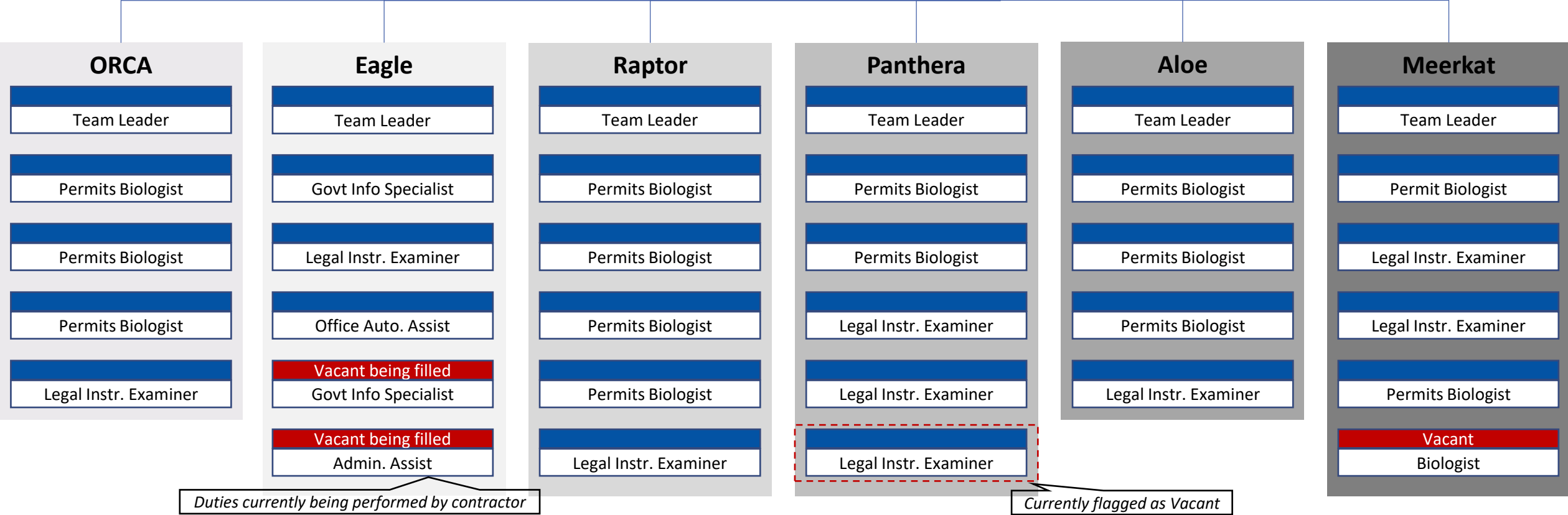
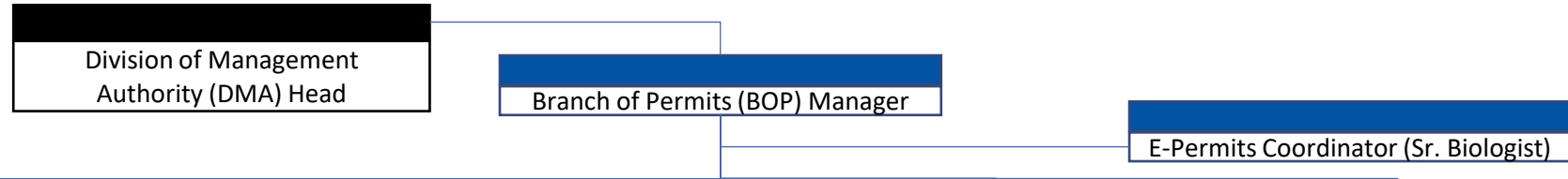
Aligned with FWS Org Structure team leads on November 17th

Dimension/ Category	Responsibilities
Clerical & Admin	-
Advisory	Scientific expert and advisor, General export determinations
Analysis & Technical & Findings	Endangered Species Act Species Listing, ESA - CITES Permits Program Monitoring
Coordination	Program Liaison, Division / Service Liaison, Program support coordinator
Permit	Amendments to CITES Appendices, Permit reviews under ESA, WBCA, and CITES, Other
Policy	Policy development and implementation, Policy development and coordination, Policy Support and implementation, Implementation of the CITES Convention, Implementation of the WBCA
Program Management	Program Management, Program Liaison
Supervisory	Supervisory



Source: Org Structure PDFs provided by FWS; PDs provided by Herman Reed;

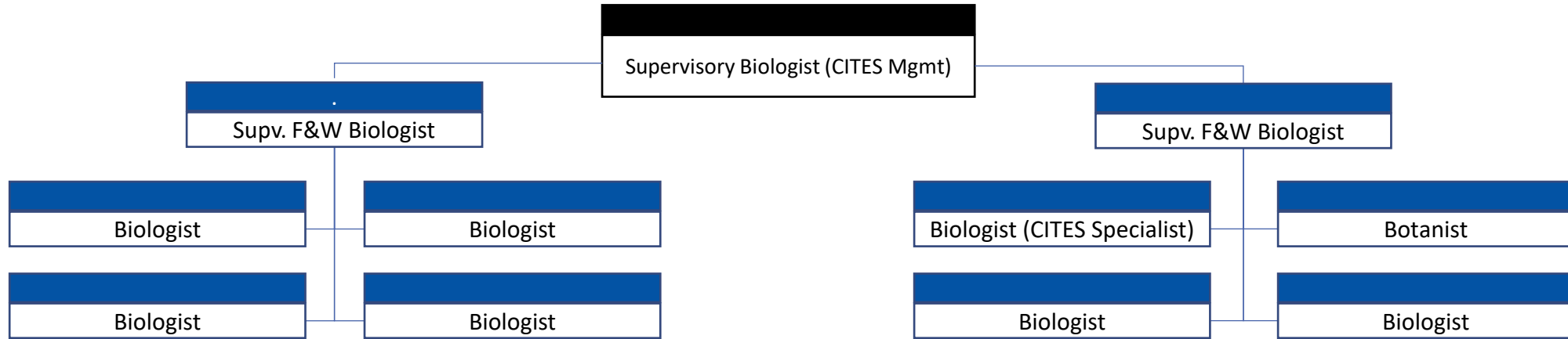
U.S. FWS, Region HQ, DMA current organizational structure



Note: there are currently 3 contractors at GS-5 and GS-6 level working 40 hours/week. Contractors helping BOS and WTCB. Contracts are for one year with possible renewal of a second year. One contractor is focused on BOP work while the two will focus on data entry. They will also be trained on CITES and data entry and ePermits



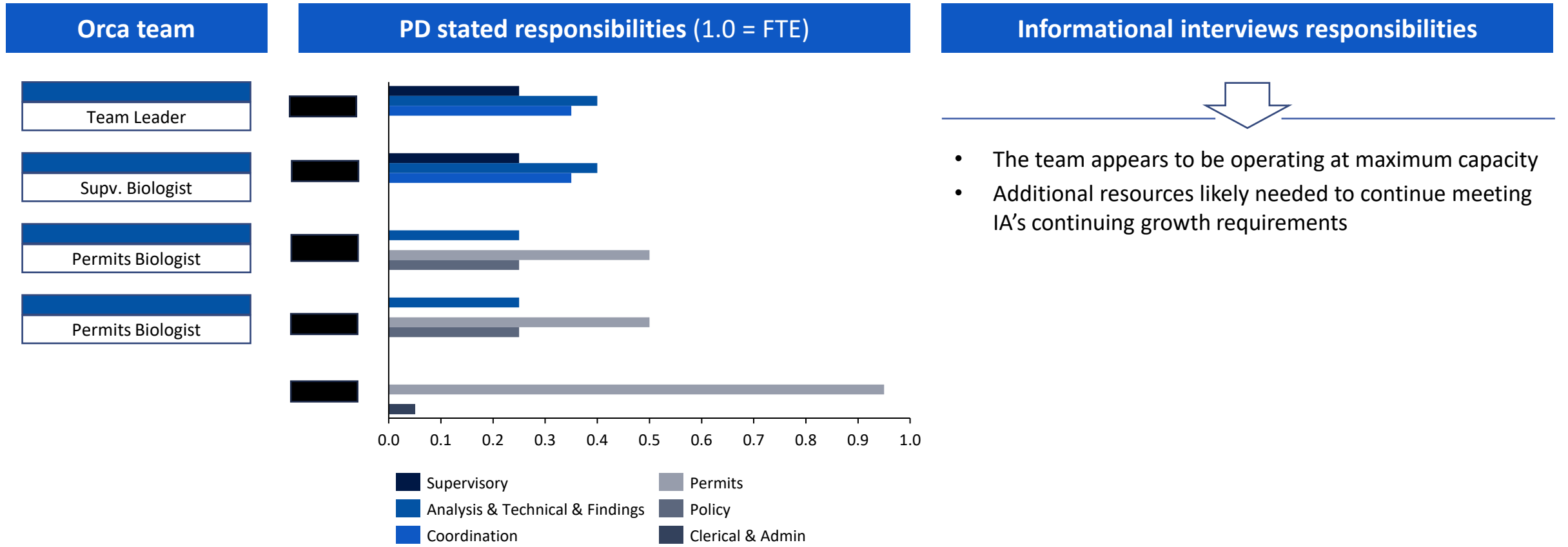
U.S. FWS, Region HQ, DSA current organizational structure



DSA: Division of Scientific Authority;
Source: Org Structure PDFs provided by FWS



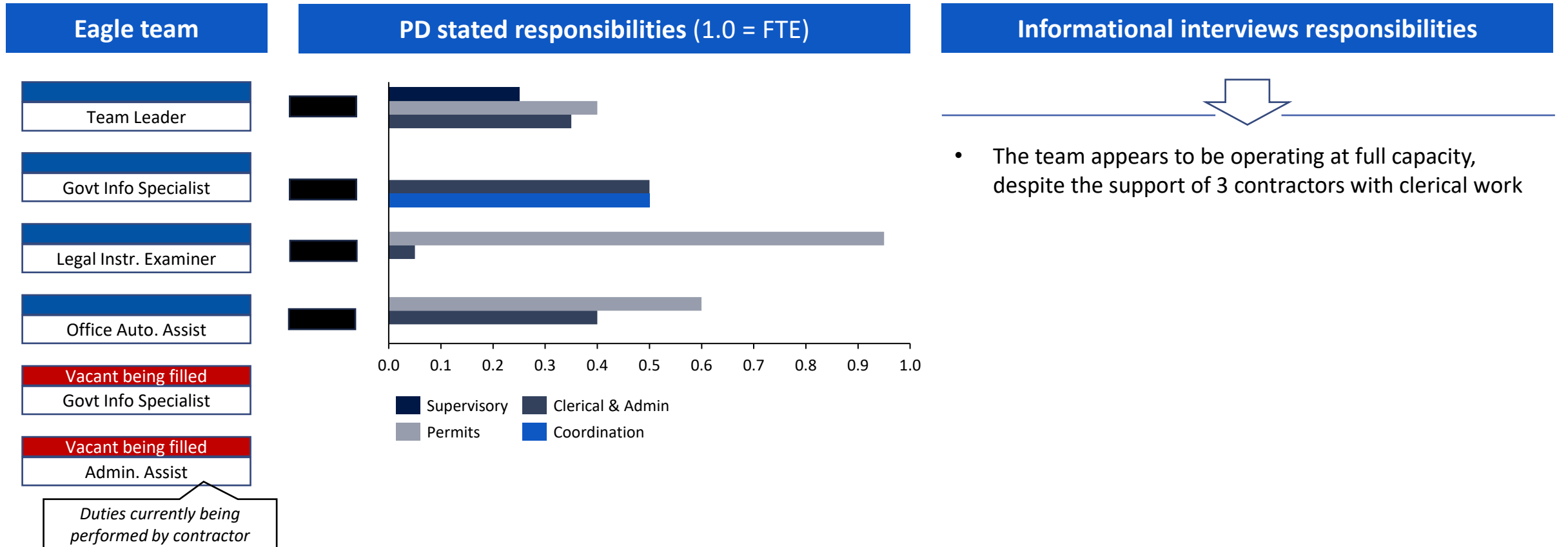
DMA Orca team | Informational interviews suggest that team members are operating at maximum capacity



Source: Org Structure PDFs provided by FWS



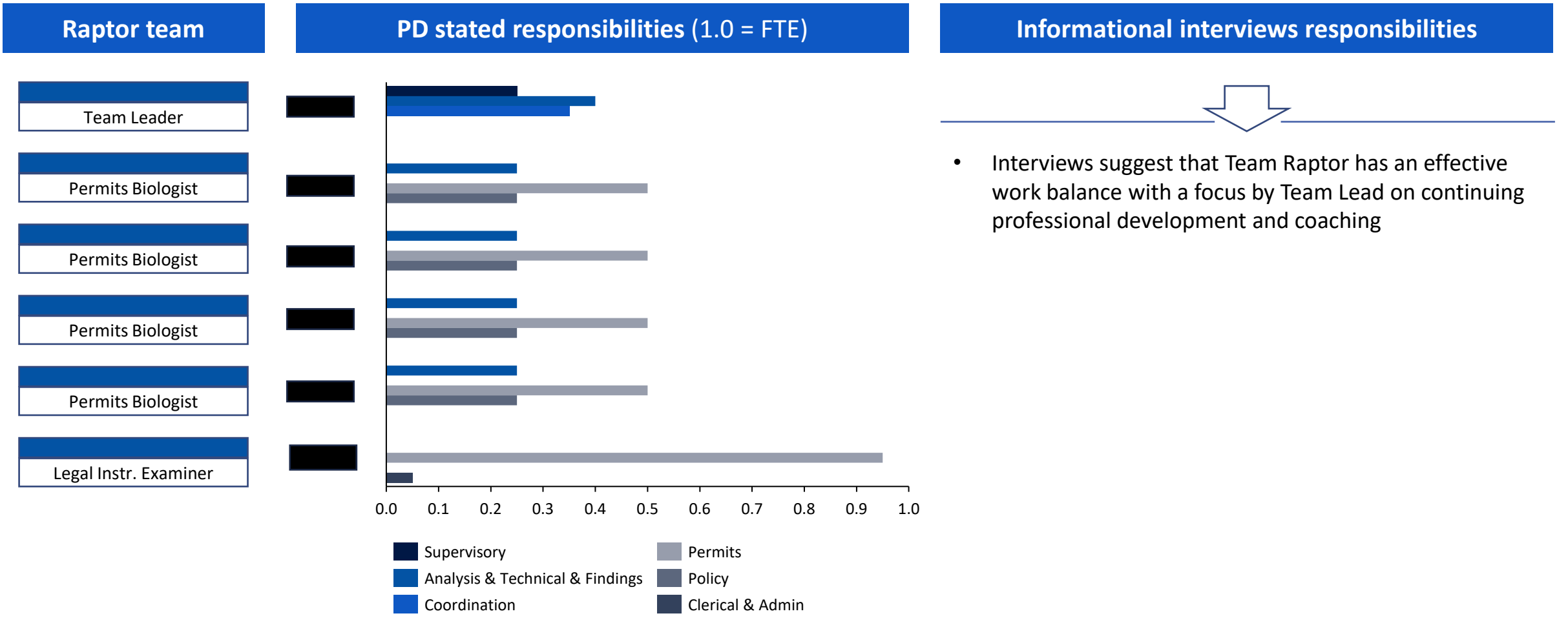
DMA Eagle team | Informational interviews indicate that the team has limited contingency when members are out of office



Source: Org Structure PDFs provided by FWS



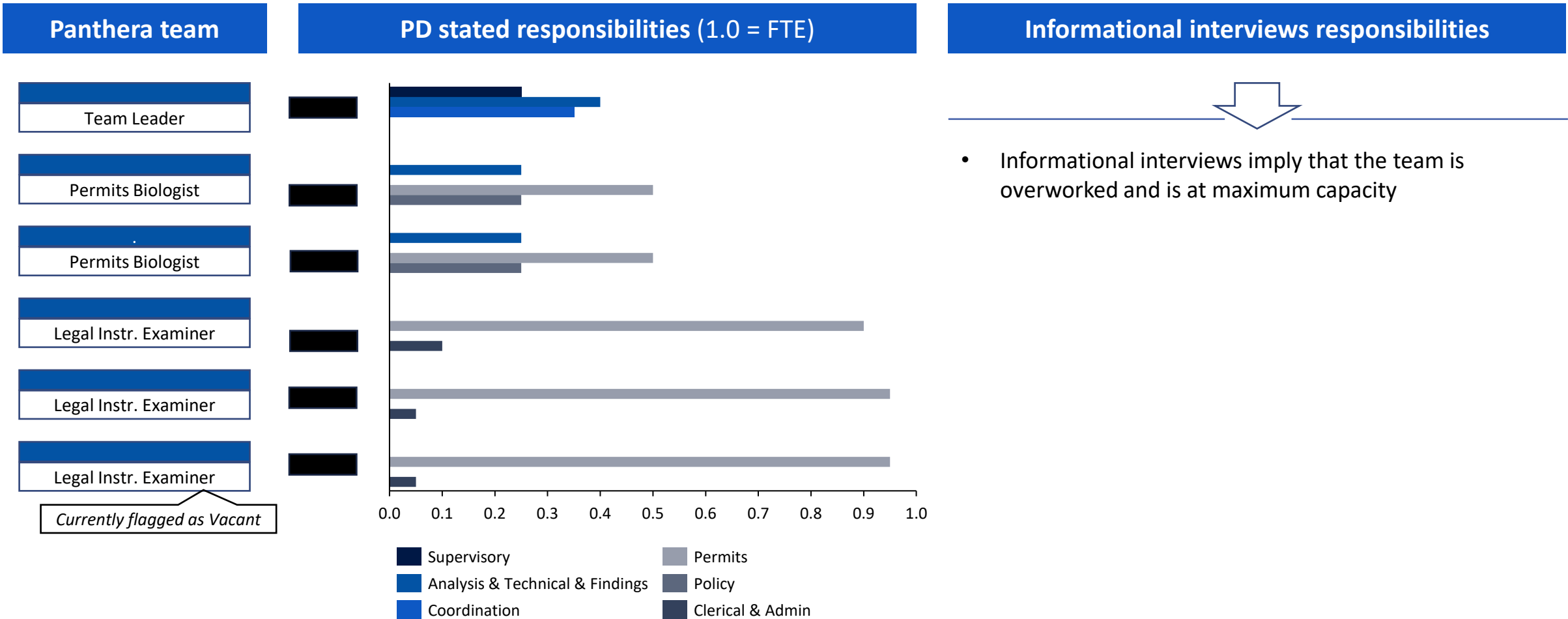
DMA Raptor team | It is suggested that team members have balanced work with a focus on professional development



Source: Org Structure PDFs provided by FWS



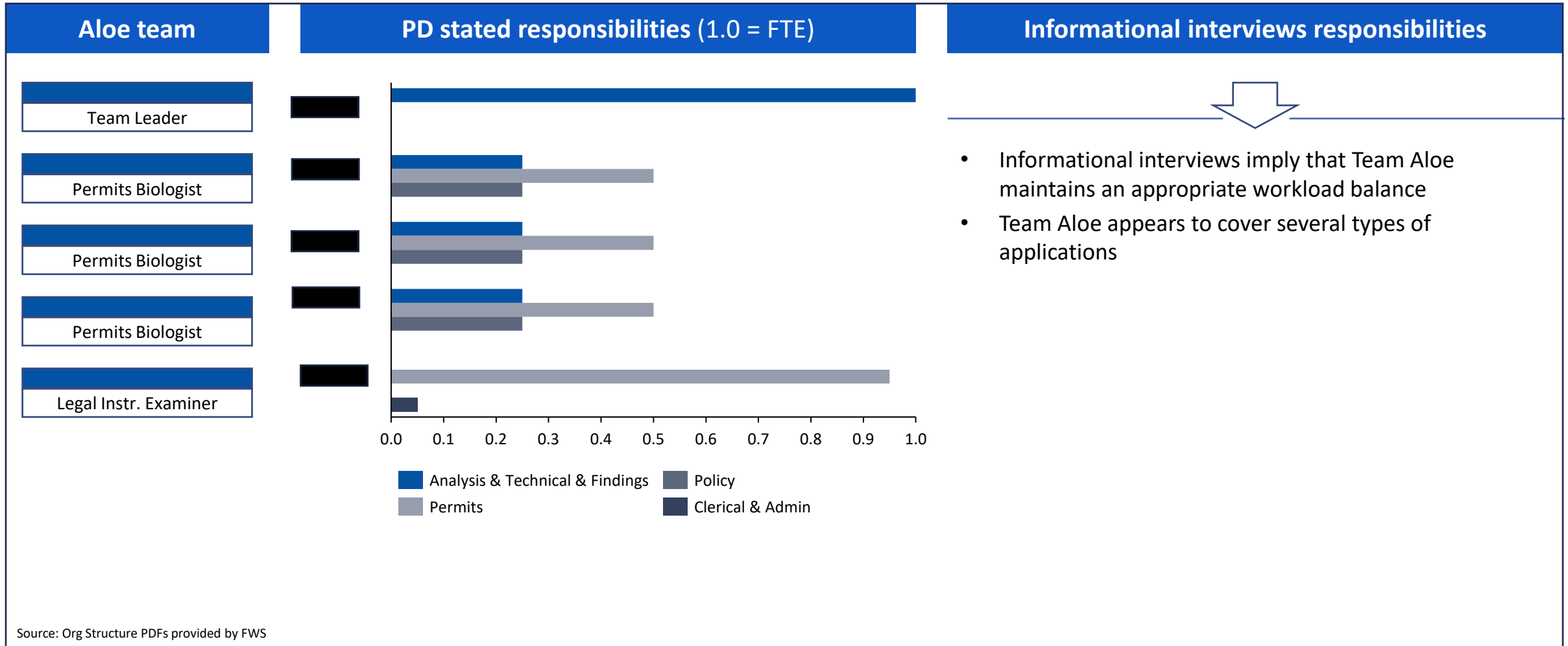
DMA Panthera team | Team Panthera appears to be operating at maximum capacity



Source: Org Structure PDFs provided by FWS



DMA Aloe team | Informational interviews suggest that Team Aloe maintains a relatively sustainable workload balance



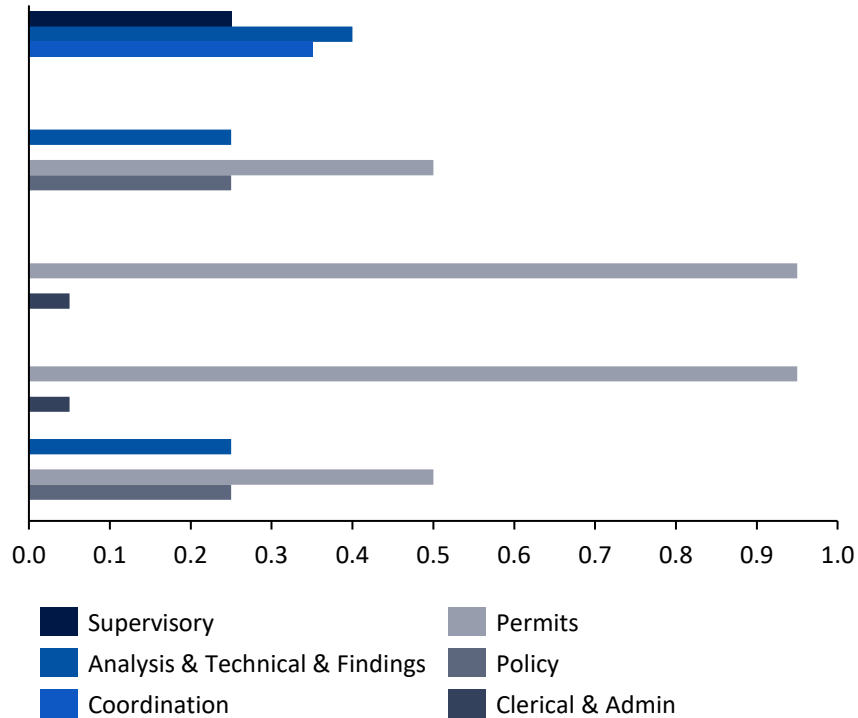
- Informational interviews imply that Team Aloe maintains an appropriate workload balance
- Team Aloe appears to cover several types of applications

DMA Meerkat team | Forecasting workload appears to be challenging due to variability in applications completion time

Meerkat team

Team Leader
Permit Biologist
Legal Instr. Examiner
Legal Instr. Examiner
Permits Biologist
Vacant
Biologist

PD stated responsibilities (1.0 = FTE)



Informational interviews responsibilities

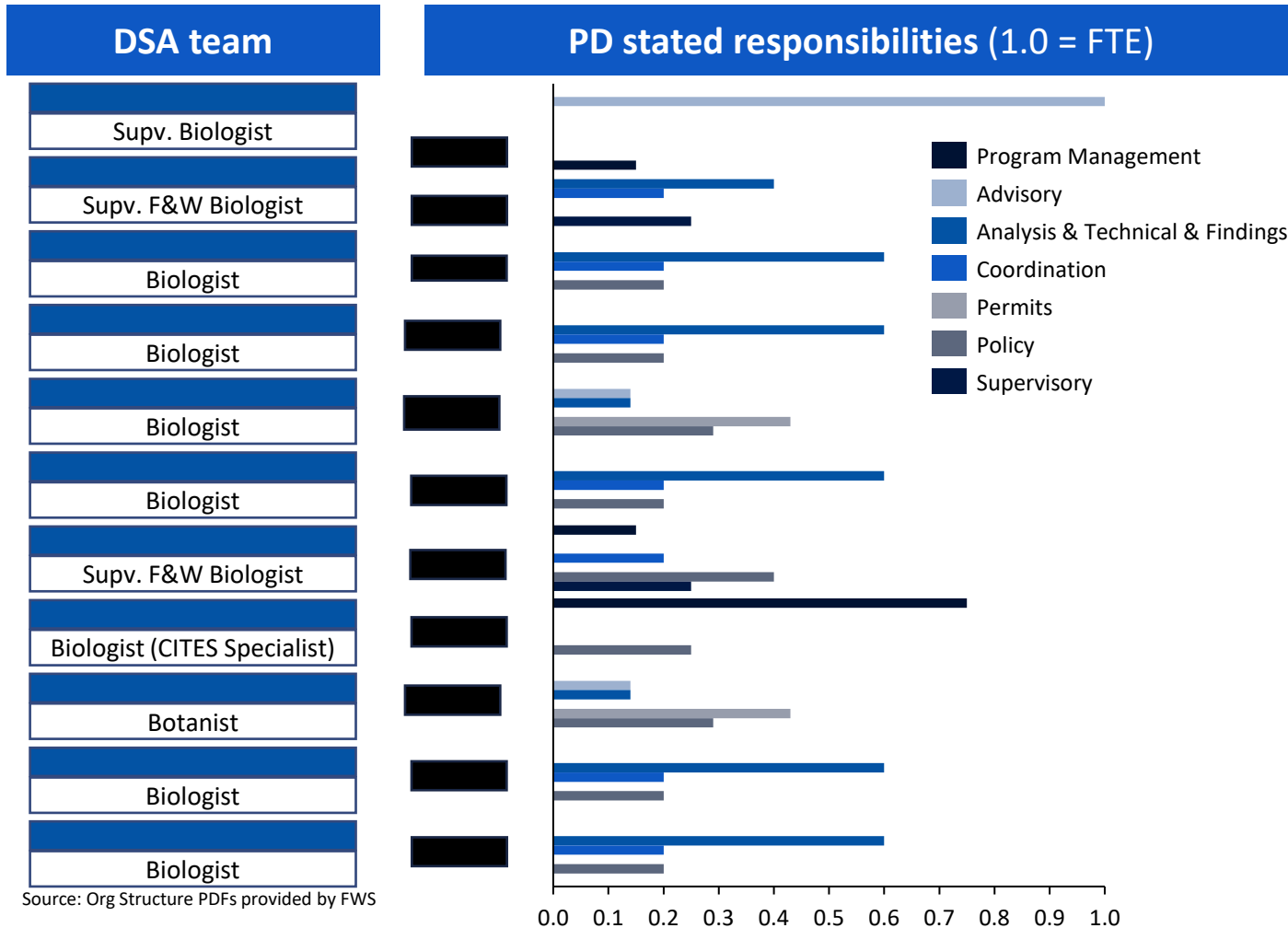


- There appears to be dependency on other teams for consultations with certain types of applications
- The interviews suggest that variability of applications and completion time makes forecasting workload somewhat challenging

Source: Org Structure PDFs provided by FWS



DSA team | Workload has recently improved but the team continues to operate at full capacity



Informational interviews responsibilities



- Informational interviews suggest that recent new joiners have helped with workload, but the team appears to continue operating at maximum capacity

Approximately 50% of the 34 FTEs in DMA that were reviewed are focused on Permit-related activities

Employee distribution by division, level, and responsibility^{1,2,3} Allocation of FTE responsibility from DMA PDs

GS level	6	8	12	13	14	15	Total
Clerical & Admin	0.4	0.5	0.5	0.4	-	-	1.8
Advisory	-	-	-	-	-	-	-
Analysis & Technical & Findings	-	-	3.0	2.6	-	-	5.2
Coordination	-	-	0.5	2.0	0.2	0.2	2.5
Permit	0.6	8.5	6.0	1.2	-	-	16.8
Policy	-	-	3.0	1.0	0.3	0.2	4.7
Program Management	-	-	-	0.7	0.3	0.4	1.4
Supervisory	-	-	-	1.3	0.3	0.3	1.6
Total	1.0	9.0	13.0	9.0	1.0	1.0	34.0

Commentary

- Due to lack of performance level 11, junior level performance team members did not have an upward career path until recent introduction of the “career ladder” with highest performance level of GS-12
 - The “career ladder” may not be yet properly disseminated to IA team members
- Given DMA’s scope and responsibilities, a high concentration of FTEs allocation to Permits related activities (~50%) aligns
- There are currently 3 contractors working 40 hours / week each at a GS-5 or GS-6 level. The contract is signed for one year with one more year as renewal (not reflected in the FTE distribution)
- There are currently four vacancies in process of being filled

1. Team members responsibilities have been mapped to a category; 2. DMA: Division of Management Authority; 3. Six team members were excluded
Source: Org Structure PDFs provided by FWS-IA; PDs provided by FWS-IA

Approximately 30% of the 11 FTEs in DSA that were reviewed are focused on Analysis & Technical activities

Employee distribution by division, level, and responsibility^{1,2} Allocation of FTE responsibility from DMA PDs

	GS level	12	13	14	15	Total
Clerical & Admin		-	-	-	-	-
Advisory		-	0.3	-	1.0	1.3
Analysis & Technical & Findings		3.0	0.3	-	-	3.3
Coordination		1.0	-	0.4	-	1.4
Permit		-	0.9	-	-	0.9
Policy		1.0	0.8	0.4	-	2.2
Program Management		-	0.8	0.7	-	1.5
Supervisory		-	-	0.5	-	0.5
Total		5.0	3.0	2.0	1.0	11.0

Commentary

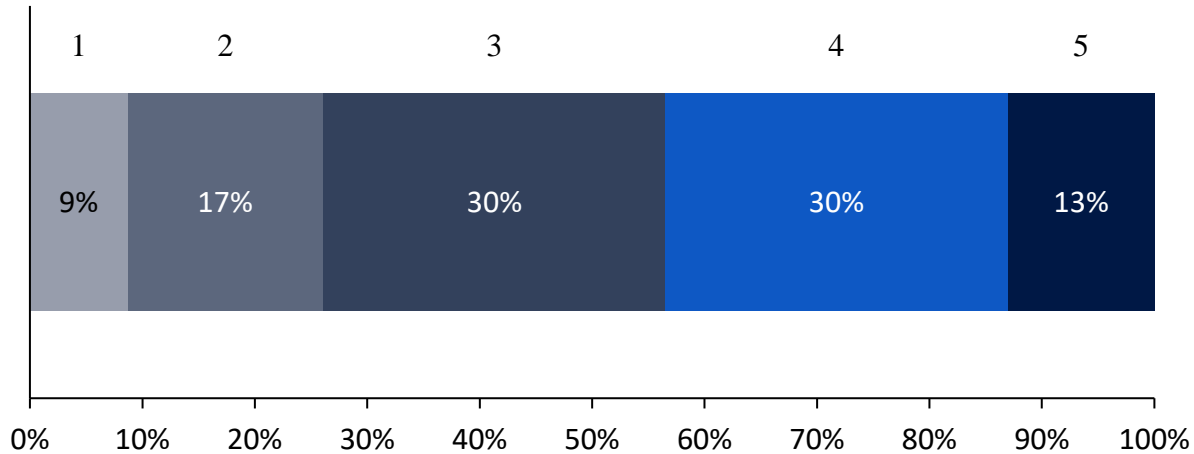
- DSA team members are exclusively at 12+ performance level due to the sophisticated nature of work the team performs and overseas
 - Senior team members currently perform activities that can be and should be completed by lower-level team members
 - No FTEs allocated to perform ‘Administrative’ activities per PDs
 - DSA tends to have vacancies occasionally, and they are typically filled with external hires (non-DSA)
- DSA key responsibilities appear to be highly concentrated with ~30% FTEs performing Analysis and Technical related activities

1. Team members responsibilities have been mapped to a category; 2. DSA: Division of Scientific Authority
Source: Org Structure PDFs provided by FWS-IA; PDs provided by FWS-IA

IA Team Members Perspective

On a scale of 1-5, where 5 is at least once a day and 1 is never, how often do you have to do activities that are not within the official position description?

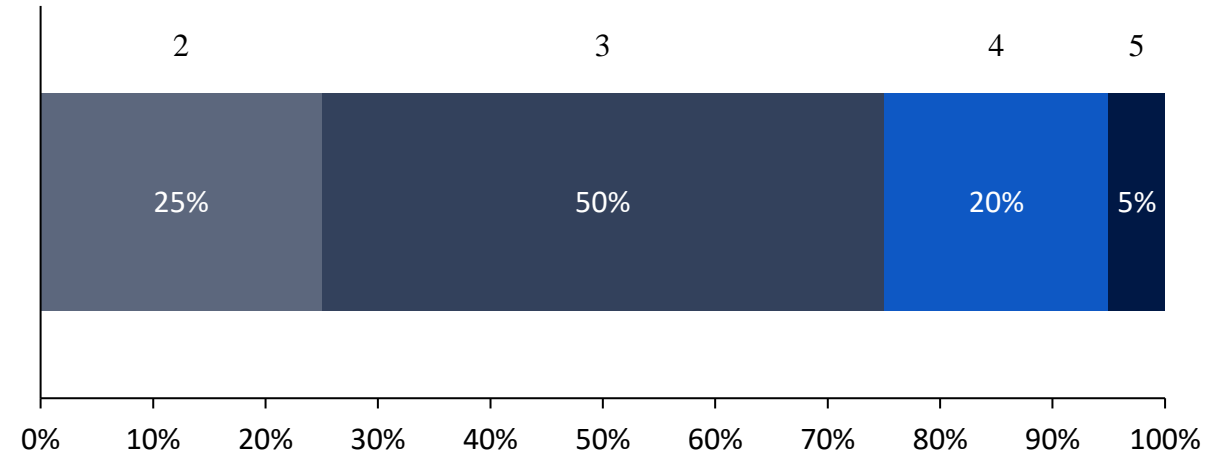
N = 23



- Team members perspective imply that the majority of team members frequently perform activities that are outside the official scope of their responsibilities
 - Consistent distraction to team members potentially leads to lower overall productivity

On a scale of 1-5, where 5 is effective and 1 is not effective, how effective is the IA team working across divisions (or functions) today? (scale 1-5)

N = 20



- Team members perspectives suggest that only ~24% believe that the IA team is effective working cross-functionally
 - Working in silos typically creates inefficiencies potentially driven by lengthy problem-solving, lack of alignment, and duplicate efforts

Source: Interviews with FWS stakeholders



DMA team members titles (1 of 2)

Name	HR Org. Chart	Title used (Team Org. structure)	Different?
[REDACTED]	Fish & Wildlife Administrator	Division of Management Authority (DMA) Head	✓
[REDACTED]	Fish & Wildlife Administrator	Branch of Permits (BOP) Manager	✓
[REDACTED]	ePermits Coordinator	ePermits Coordinator (Sr. Biologist)	✓
[REDACTED]	Supervisory Biologist	Team Lead	✓
[REDACTED]	Permits Biologist	Senior Biologist	✓
[REDACTED]	Supervisory Biologist	Team Lead	✓
[REDACTED]	Supervisory Wildlife Biologist	Team Lead	✓
[REDACTED]	Permits Biologist	Senior Biologist	✓
[REDACTED]	Permits Biologist	Senior Biologist	✓
[REDACTED]	Team Lead	Supervisory Policy Specialist (CITES)	✓
[REDACTED]	Permits Biologist	Senior Biologist	✓
[REDACTED]	Permits Biologist	Senior Biologist	✓
[REDACTED]	Supervisory Biologist	Team Leader	✓
[REDACTED]	Supervisory Biologist	Senior Biologist	✓
[REDACTED]	Supervisory Management and Program Analyst	Team Leader	✓
[REDACTED]	Permits Biologist	Senior Biologist	✓
[REDACTED]	Permits Biologist	Senior Biologist	✓

Source: Org Structure PDFs provided by FWS



DMA team members titles (2 of 2)

Name	HR Org. Chart	Title used (Team Org. structure)	Different?
[REDACTED]	Permits Biologist	Senior Biologist	✓
[REDACTED]	Permits Biologist	Biologist	
[REDACTED]	Permits Biologist	Biologist	
[REDACTED]	Government Information Specialist	Government Information Specialist	
[REDACTED]	Office Automation Assistant	Office Automation Assistant	
[REDACTED]	Permits Biologist	Biologist	
[REDACTED]	Permits Biologist	Biologist	
[REDACTED]	Legal Instruments Examiner	Legal Examiner NDAA	
[REDACTED]	Legal Instruments Examiner	Legal Examiner NDAA	
[REDACTED]	Legal Instruments Examiner	Legal Examiner NDAA	
[REDACTED]	Legal Instruments Examiner	Legal Examiner	
[REDACTED]	Legal Instruments Examiner	Legal Examiner	
[REDACTED]	Legal Instruments Examiner	Legal Examiner	
[REDACTED]	Legal Instruments Examiner	Legal Examiner	
[REDACTED]	Legal Instruments Examiner	Legal Examiner	
[REDACTED]	Permits Biologist	Biologist	

Source: Org Structure PDFs provided by FWS



DSA team members titles

Name	HR Org. Chart	Title used (Team Org. structure)	Different?
[REDACTED]	Supervisory Biologist (CITES Management)	Supervisory Biologist (CITES Management)	
[REDACTED]	Branch Chief of Branch of Consultation and Monitoring	Supervisory Fish & Wildlife Biologist	✓
[REDACTED]	Biologist (CITES)	Biologist	
[REDACTED]	Botanist	Botanist	
[REDACTED]	Biologist (CITES)	Biologist	
[REDACTED]	Biologist (CITES)	Biologist	
[REDACTED]	Branch Chief of Branch of Conservation Science Policy	Supervisory Fish & Wildlife Biologist	✓
[REDACTED]	Biologist (CITES Specialist)	Biologist (CITES Specialist)	
[REDACTED]	Botanist	Botanist	
[REDACTED]	Biologist (CITES)	Biologist	
[REDACTED]	Biologist (CITES)	Biologist	

Source: Org Structure PDFs provided by FWS



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The Jandor Group engaged internal and external stakeholders as part of its ethnographic research study

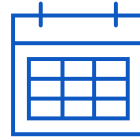
62



Interviews

The Jandor Group spent time with 62 individuals conducting ethnographic research (interviews)

18



Weeks

Over the course of 18 weeks, we interviewed nominated team members and customers to assess the current state

24

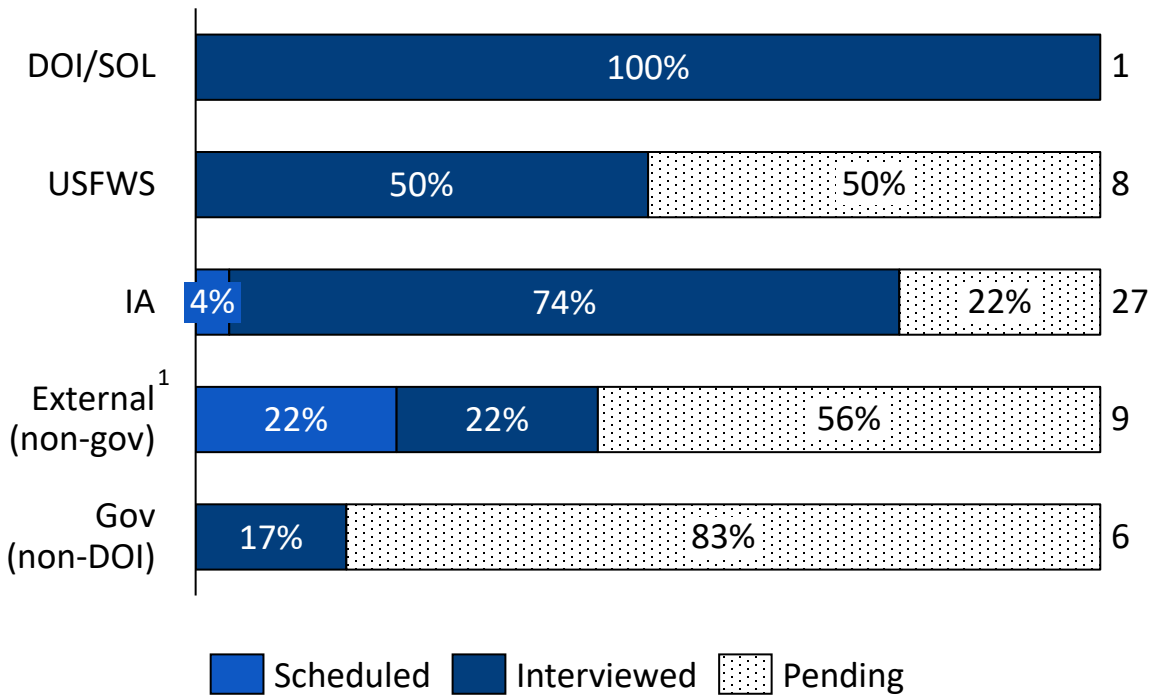


Groups

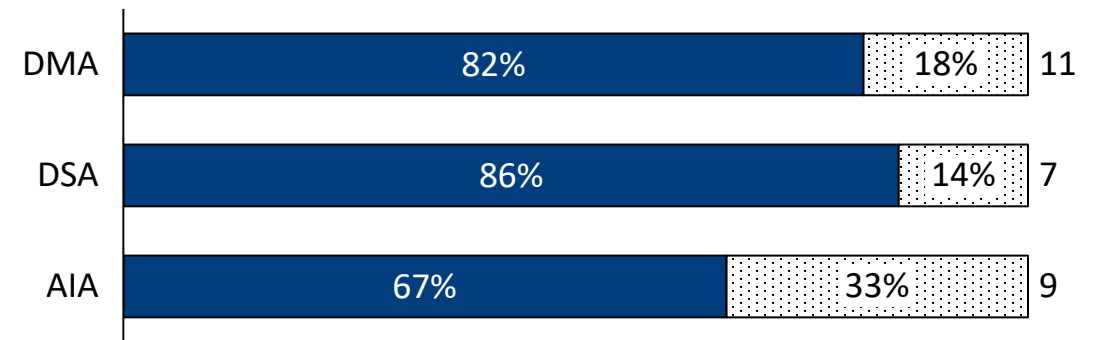
To ensure quality analysis we interviewed inside and outside of the organization; in 15 government groups and 9 external groups

Interviews completed for 86% and 82% of DSA and DMA respectively

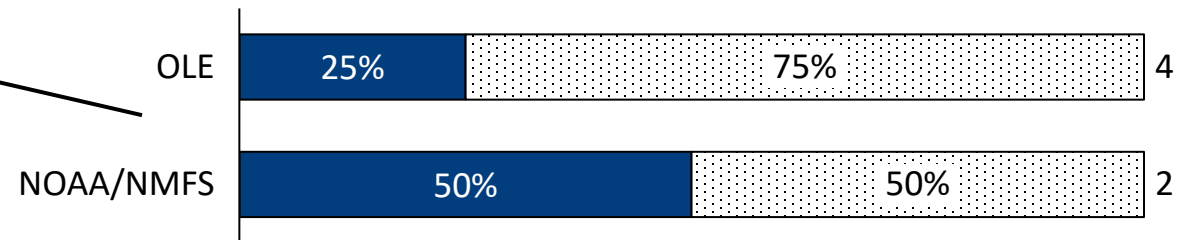
Interview Status by Stakeholder Area



Interview Status by Stakeholder Group (IA only)



Interview Status by Stakeholder Group (Gov only)



1. Analysis in-progress; to be updated once all nine external interviews are completed

To ensure quality observations, the interview methodology relies on three key elements

Key elements



Breadth and Depth

Interview questions covered a wide array of areas within the US Fish and Wildlife organization. This spanned across people, process, and technology aspects. Additional questions went deep into both the facts and feelings of interviewees



Qualitative and Comparable

Qualitative data provides context to observations and findings. Interview questions contained a mix of open-ended and yes/no questions to capture the context of interviewee situations



Quantitative and Measurable

Data was captured through rapid fire interview questions to prevent interviewer bias and increase the measurability of our findings



Early and Often Collaboration

TJG and IA leads collaborated on interview structure and questions including a pilot conducted before large-scale deployment to the organization and external stakeholders

Emerging themes from interviews across process, people, and technology

Process



Communication is paramount to success



Documentation is an afterthought



Capacity issues cause burnout



Collaborative information sharing helps navigate responsibilities

People



Stabilization of roles is needed



Culture is team-based



Institutional knowledge departs with talent



Collective effort is highly valued

Technology



Prioritization is externally driven



Roadmap for ePermits is needed







Strong stance on technology is prevalent







Enhanced training and updated SOPs needed

Autonomy is appreciated, but more standardization and capacity to build relationships is desired

	Theme	Overall Sentiment	
	<p>Communication is paramount to success</p>	<p>✓ Standardization of process and more communication is desired</p>	<p>✗ Communication gaps impact all stakeholder experiences</p>
	<p>Documentation is an afterthought</p>	<p>✓ Autonomy empowers employees to take initiative and ownership</p>	<p>✗ Teams are ‘reinventing the wheel’ with disparate documentation</p>
	<p>Capacity issues cause burnout</p>	<p>✓ None</p>	<p>✗ Time is scarce for crucial cross-team relationship building and collaboration</p>
	<p>Collaborative information sharing helps navigate responsibilities</p>	<p>✓ Employees want more collaborative ways of working with official resources</p>	<p>✗ Unofficial peer to peer sharing processes could lead to outdated resources</p>





Source: Stakeholder interviews from additional list

Excitement/satisfaction with team culture expressed; cross-team activities and knowledge-sharing gaps identified

	<u>Theme</u>	<u>Overall Sentiment</u>	
	Stabilization of roles is needed	<ul style="list-style-type: none"> ✓ Exposure to many roles encourages development 	<ul style="list-style-type: none"> ✗ Transitioning roles can be distracting
	Culture is team-based	<ul style="list-style-type: none"> ✓ Job satisfaction and safety is shared on a team level 	<ul style="list-style-type: none"> ✗ Pockets of cultures pose barriers for collaboration
	Institutional knowledge departs with talent	<ul style="list-style-type: none"> ✓ None 	<ul style="list-style-type: none"> ✗ Relationships, research, and know-how start from scratch when key employees exit
	Collective effort is highly valued	<ul style="list-style-type: none"> ✓ Appreciation for supportive colleagues and teamwork over individual accomplishment 	<ul style="list-style-type: none"> ✗ Time and capacity limits peer-to-peer engagement

Source: Stakeholder interviews from additional list

Stakeholders remain hopeful that technology will improve satisfaction and applicant prioritization

	<u>Theme</u>	<u>Overall Sentiment</u>	
	Prioritization is externally driven	<ul style="list-style-type: none"> ✓ Current priorities are customer-centric where “squeaky wheel gets the grease” 	<ul style="list-style-type: none"> ✗ Conservation of species is not the highest priority
	Roadmap for ePermits is needed	<ul style="list-style-type: none"> ✓ Teams are hopeful for change 	<ul style="list-style-type: none"> ✗ Short-term, mid-term, and long-term future picture is unknown
	Strong stance on technology is prevalent	<ul style="list-style-type: none"> ✓ Optimism runs deep for continued modernization 	<ul style="list-style-type: none"> ✗ The current technology is better than nothing
	Enhanced training and updated SOPs needed	<ul style="list-style-type: none"> ✓ More education and SOP rigor is requested to utilize technology (ePermit) effectively 	<ul style="list-style-type: none"> ✗ There is gap between technology and user competency

Source: Stakeholder interviews from additional list

We are collecting voice of customer through external interviews

Process



Prioritization and urgency indicators needed



Feedback and continuous improvement is needed



Streamlining and refinements requested

People



Emphasis on importance of responsiveness



Dedicated contact points desired



Regular stakeholder community engagement needed

Technology



Lack of enhancements significantly impacts usability






Information accessibility and management needs improvement






Strong desire for more digital transformation and innovation

Animal welfare is no longer simply a risk, the process is failing species that require timely moves

Theme	Overall Sentiment
 <p data-bbox="402 554 690 672">Prioritization and urgency indicators needed</p>	<p data-bbox="779 611 896 648">✓ None</p> <p data-bbox="1646 611 2333 648">✗ Features and functions lack urgency signals</p>
 <p data-bbox="422 782 690 943">Feedback and continuous improvement is needed</p>	<p data-bbox="779 853 896 891">✓ None</p> <p data-bbox="1646 839 2232 915">✗ External stakeholders want answers, improvements, and support</p>
 <p data-bbox="415 1068 690 1186">Streamlining and refinements requested</p>	<p data-bbox="779 1110 896 1148">✓ None</p> <p data-bbox="1646 1096 2206 1172">✗ External stakeholders are spending resources trying to problem-solve</p>




Source: Stakeholder interviews from additional list

External stakeholders seek more education, advocacy, and responsiveness

Theme	Overall Sentiment	
 <p>Emphasis on importance of responsiveness</p>	<p>✓ Expertise and competency is not in question</p>	<p>✗ Communication is not frequent enough</p>
 <p>Dedicated contact points desired</p>	<p>✓ Past dedicated reps were valuable</p>	<p>✗ There is a need for case advocacy</p>
 <p>Regular stakeholder community engagement needed</p>	<p>✓ External stakeholders are creatively wanted to resolve</p>	<p>✗ There is a gap in stakeholder processes and education</p>

Source: Stakeholder interviews from additional list

External stakeholders seek and show interest in shaping the ePermit program

	<u>Theme</u>		<u>Overall Sentiment</u>
	Lack of enhancements significantly impacts usability	✓ None	✗ Basic functionality is causing impacts to every external stakeholder
	Information accessibility needs improvement	✓ None	✗ Many access issues and guessing games
	Strong desire for more digital transformation and innovation	✓ None	✗ Time is scarce for crucial cross-team relationship building and collaboration

Source: Stakeholder interviews from additional list

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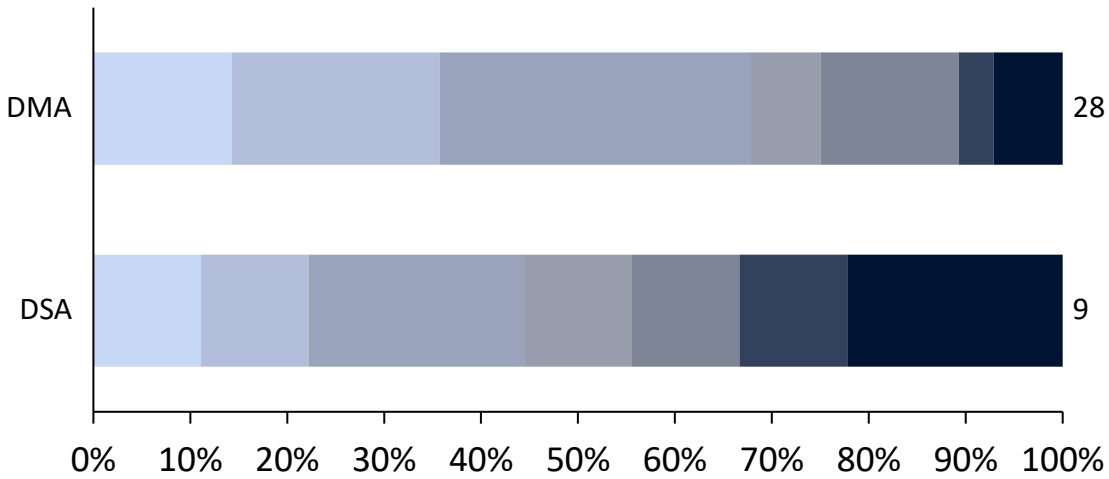
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88% of survey target audience responded, comprising 28 DMA and 9 of DSA

Survey participants



Approximately how many years have you been working in IA?



- DMA
- n/a
- Eagle
- Meerkat
- Panthera
- DSA
- Leadership
- Aloe
- Orca
- Raptor

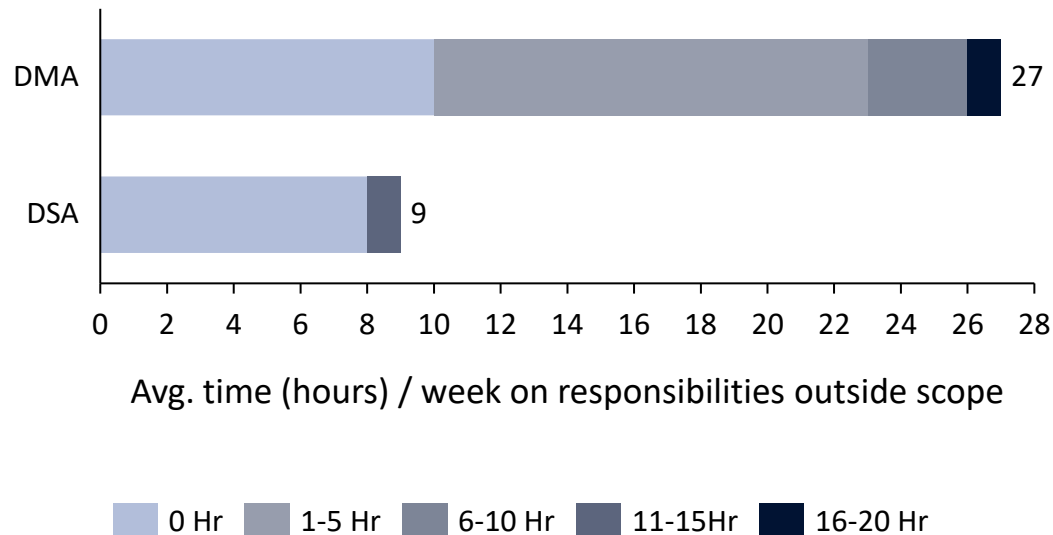
- <1 Yr
- 3-5 Yr
- 11-15 Yr
- 20+ Yr
- 1-2 Yr
- 6-10 Yr
- 16-20 Yr

Note: two DSA team members took the survey twice and they are only counted once in the above graph;
Source: 'IA employee activity survey'



85%+ of DMA and DSA employees are spending less than 5 hours per week on responsibilities outside of their scope

How much time (in hours) do you estimate spending on responsibilities outside of the scope of your position, on average, per week?



Commentary

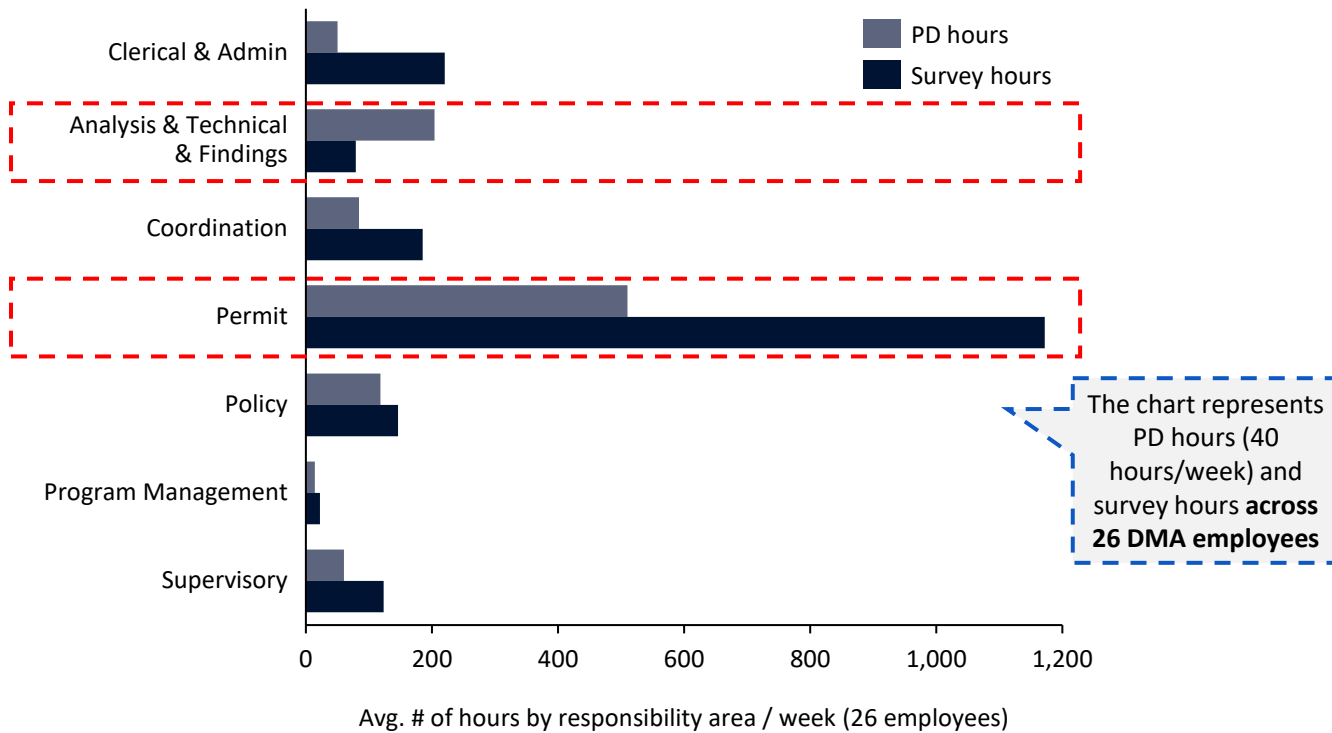
- Most of DSA team members appear to be spending their time on activities within the scope of their position, suggesting that responsibilities are clearly defined and guardrails are well established
- The majority of DMA team members appear to be spending time on activities outside the scope of their position, suggesting lack of clarity on responsibilities potentially resulting in inefficiencies

Note: two DSA team members took the survey twice and they are only counted once in the above graph; One DMA team member didn't complete the number of hours
Source: 'IA employee activity survey'

DMA | Survey suggests there is a disconnect equivalent to ~23 FTEs between planned resources and current workload

How much time (in hours) do you estimate spending on each responsibility, on average, per week?

Commentary

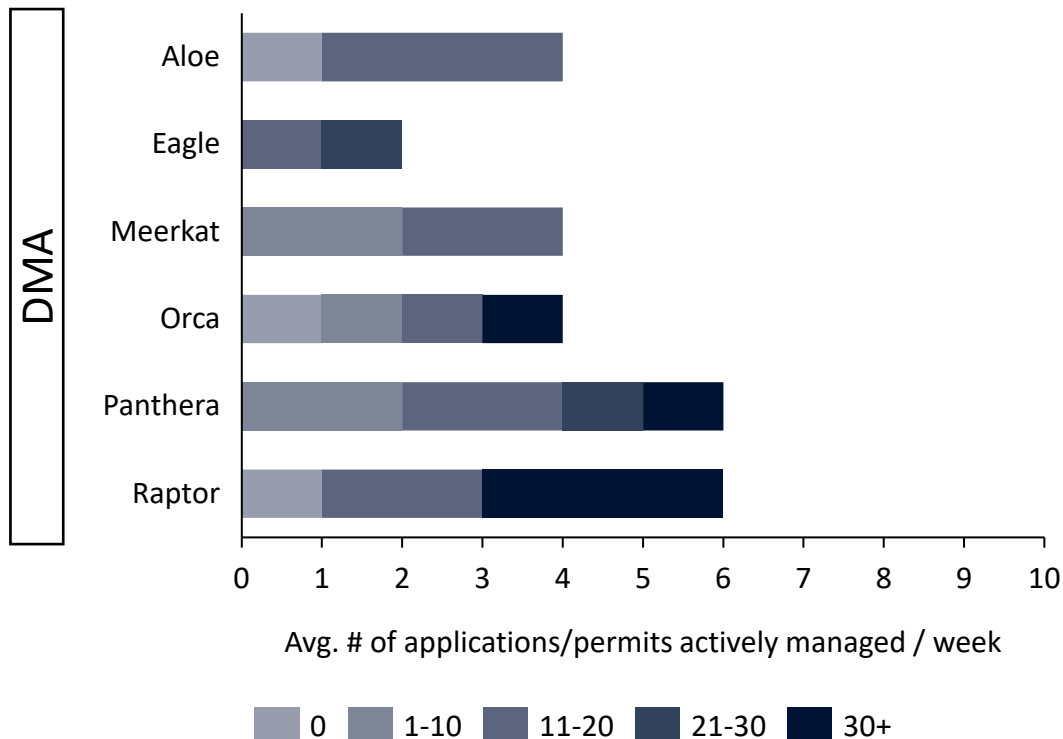


- DMA team members appear to be spending extra ~2x hours on Permit-related activities over their expected hours according to position descriptions, while spending ~70% less of their expected hours on Analysis & Technical Findings

Note: PD hours are estimated based on 40 hours / week; 26 relevant team members provided input; One team member did not provide input, while another was not in provided org chart
Source: IA employee activity survey, March 2024

While different team manage different number of permits weekly, 50% of Team Raptor manages 30+ permits weekly

How many applications/permits do you actively manage*, on average, per week?*



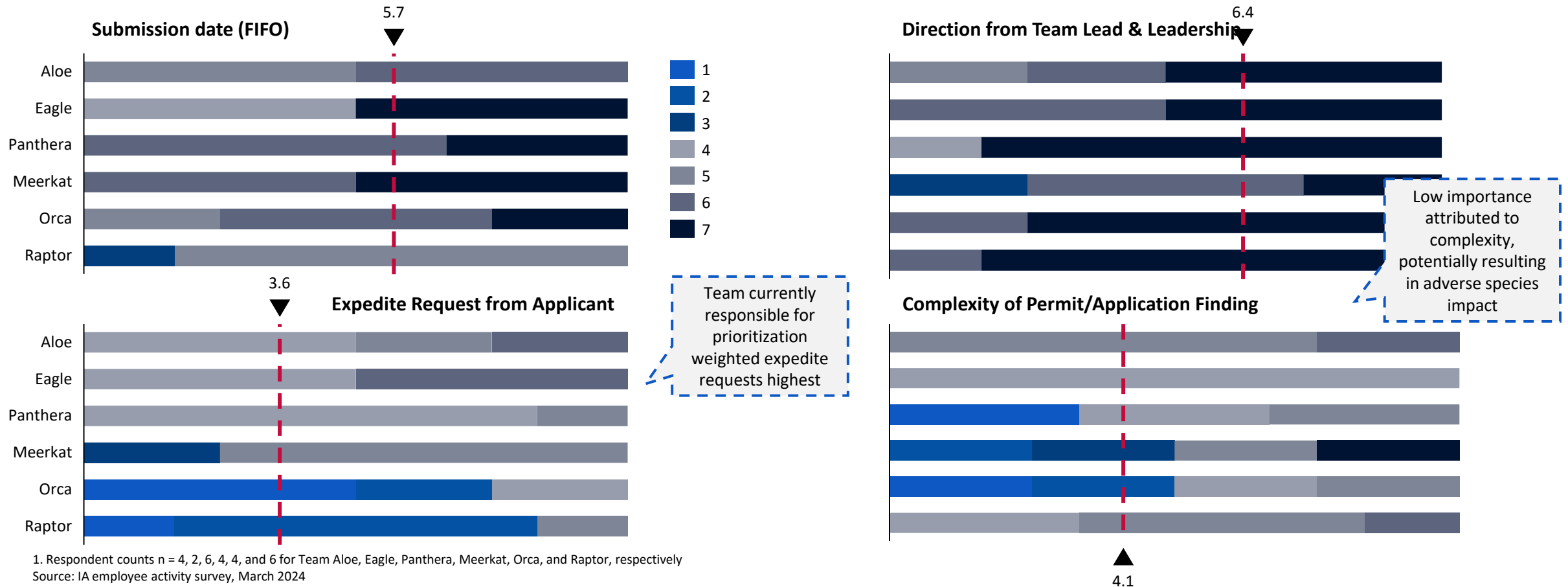
Commentary

- Different DMA teams appear to have varying levels of permits to manage on a weekly basis
- Survey data suggests that Team Raptor has the most team members that manage 30+ permits on a weekly basis
- The different number of permits managed by each team could be driven by the level of complexity of permits managed by each team

Note: *responding to status updates, conducting findings, reviewing documents, federal registrar, briefings, etc. If none or not applicable type 0"
Source: 'IA employee activity survey'

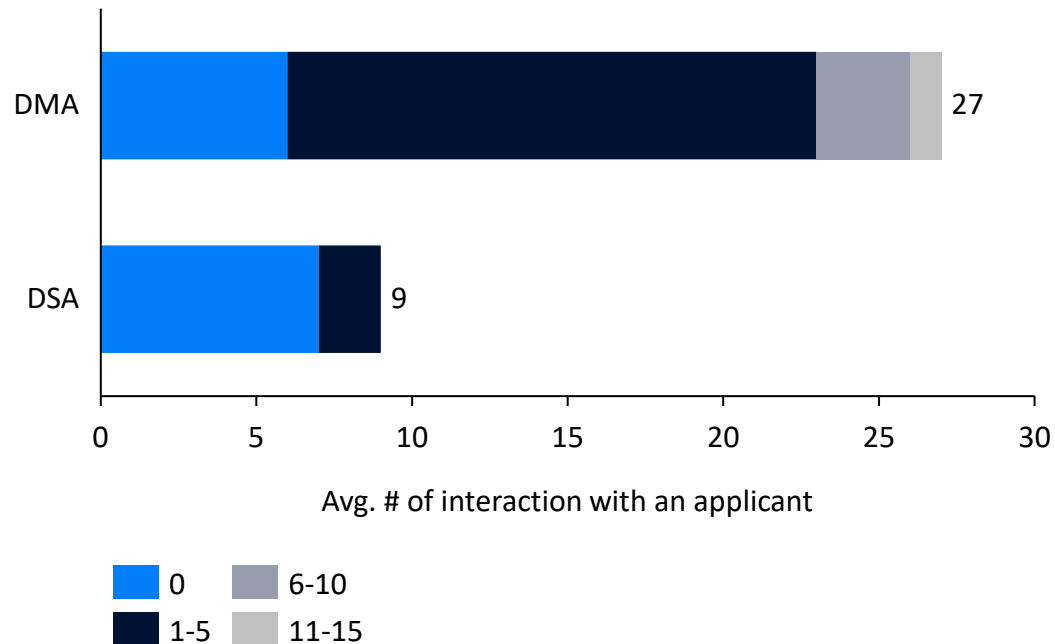
Submission date and Direction from Team Lead were weighted as the most important factors in prioritizing permits

On a scale of 1 to 7 with 1 being "least important," 7 being "most important," and 4 being "neutral," how important are the following factors to you when prioritizing which applications/permits to manage?¹



78% of DMA employees have at least one interaction applicant, with a handful interacting significantly more often

Q: How many interactions do you have with an applicant, on average, per application?



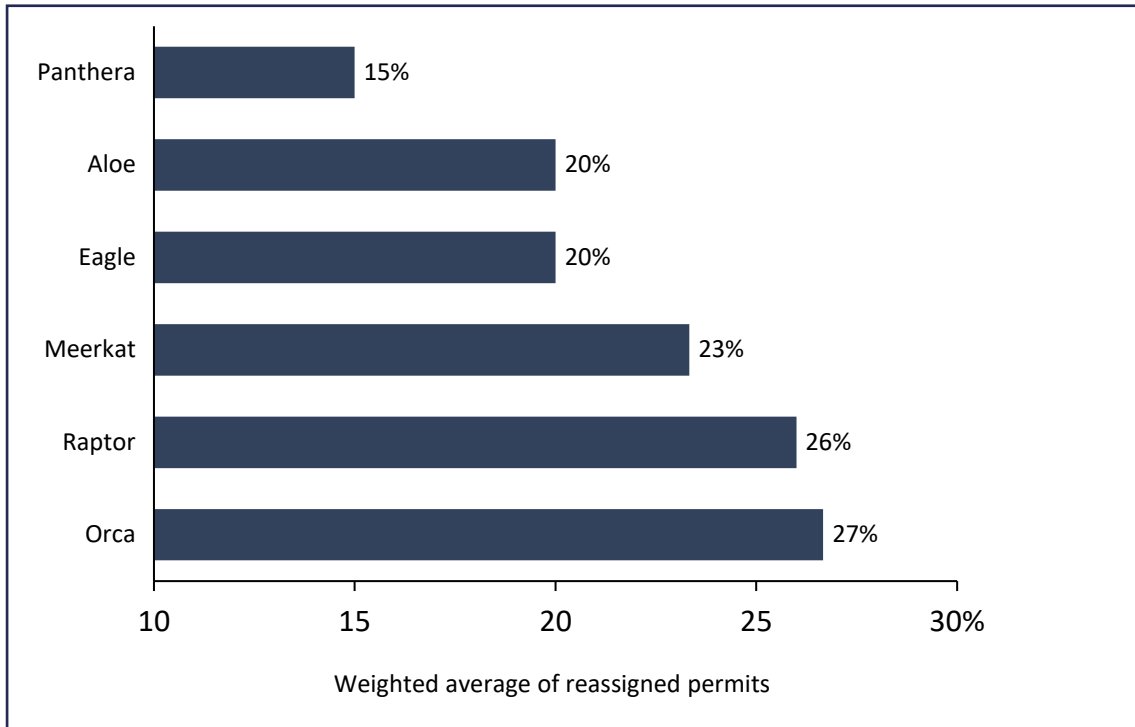
Commentary

- Frequent interactions with applicants creates inefficiencies and meaningful delays in completing permitting applications. Avoidable interactions can be mitigated through various strategies:
 - **Reduction in data entry errors:** providing very clear instructions and guidance to applicants upfront reduces data entry error
 - **Front-end data validation:** establish data validation process on the front-end of the application process can lead to reduction in tickets related to data entry issues
 - **Number of interactions cap:** limit the number of times an applicant can interact with IA employees

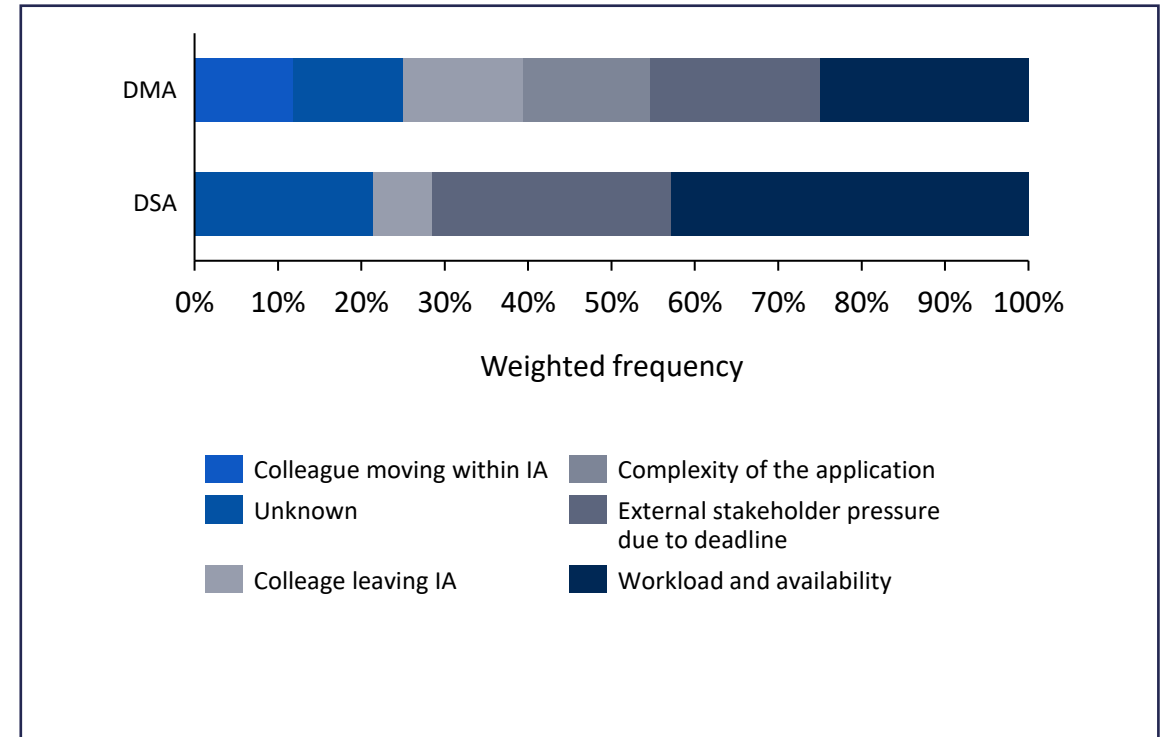
Note: One DMA team member did not provide an answer for these questions
Source: IA employee activity survey, March 2024

Workload and availability was reported as the most common driver of reassignments in DMA and DSA

Q: What percentage of applications/permits that you actively manage are reassigned to you (i.e., you were not the first person to work on the permit/application)?¹ – DMA only



Q: What are the top three most common reasons for reassigning applications/permits?

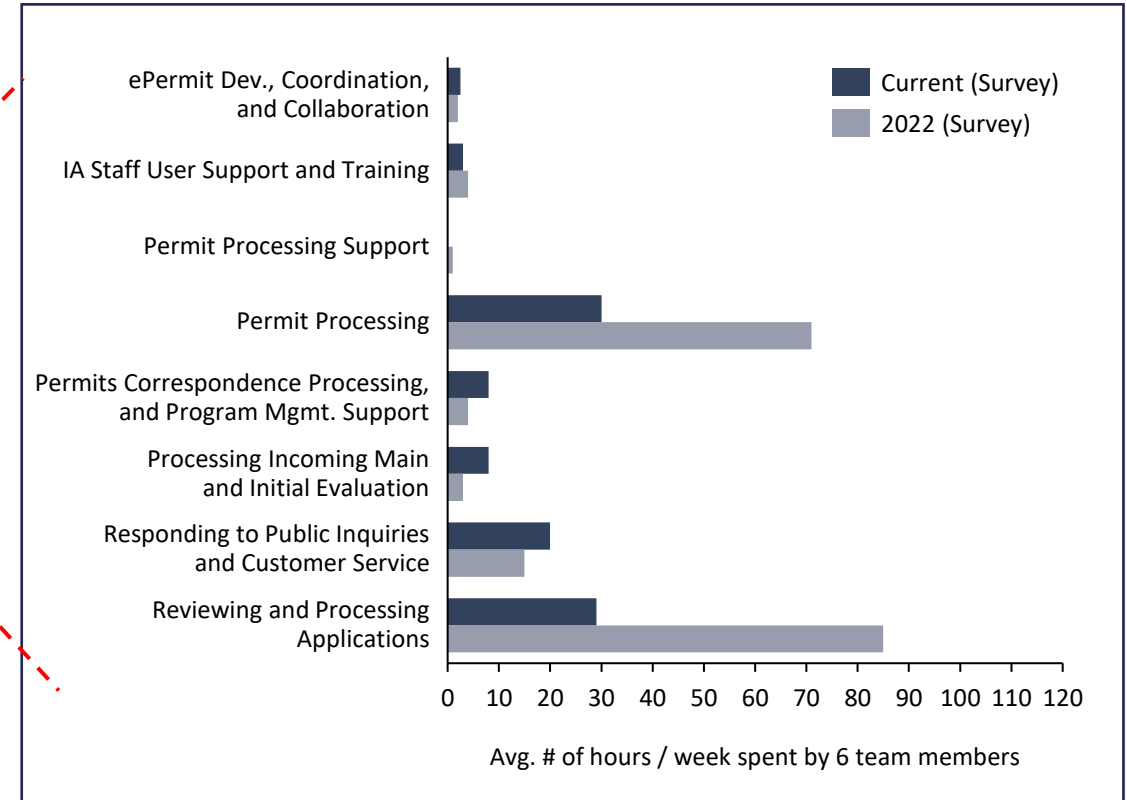
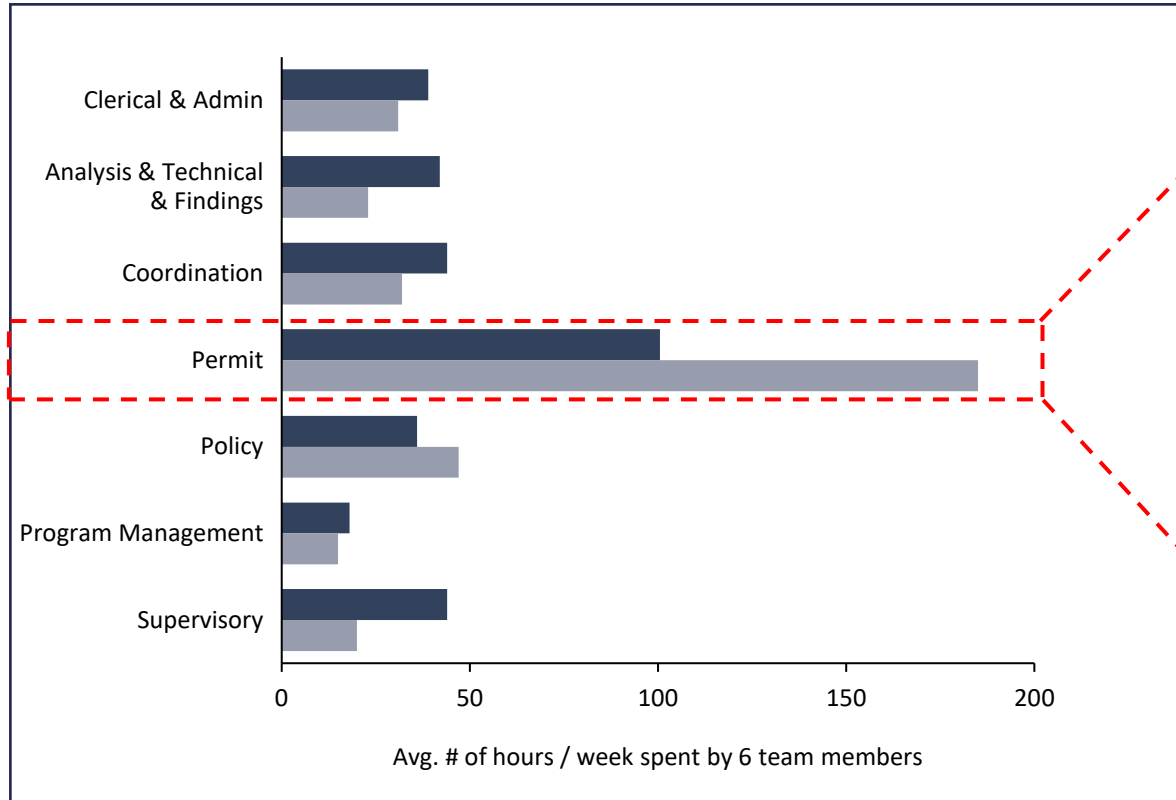


Note: 1. DSA team members were not asked this question; 'Weighted Frequency' is calculated by multiplying Factor #1 by 3 point, Factor #2 by 2 points, and Factor #3 by 1 point
 Source: IA employee activity survey, March 2024



For team members with different responsibilities versus 2022, survey reports they are spending ~50% less time on permits

Q: How much time (in hours) do you estimate spending on each responsibility, on average, per week?
 In 2022, were you on the same team? In 2022, were your responsibilities different from today?

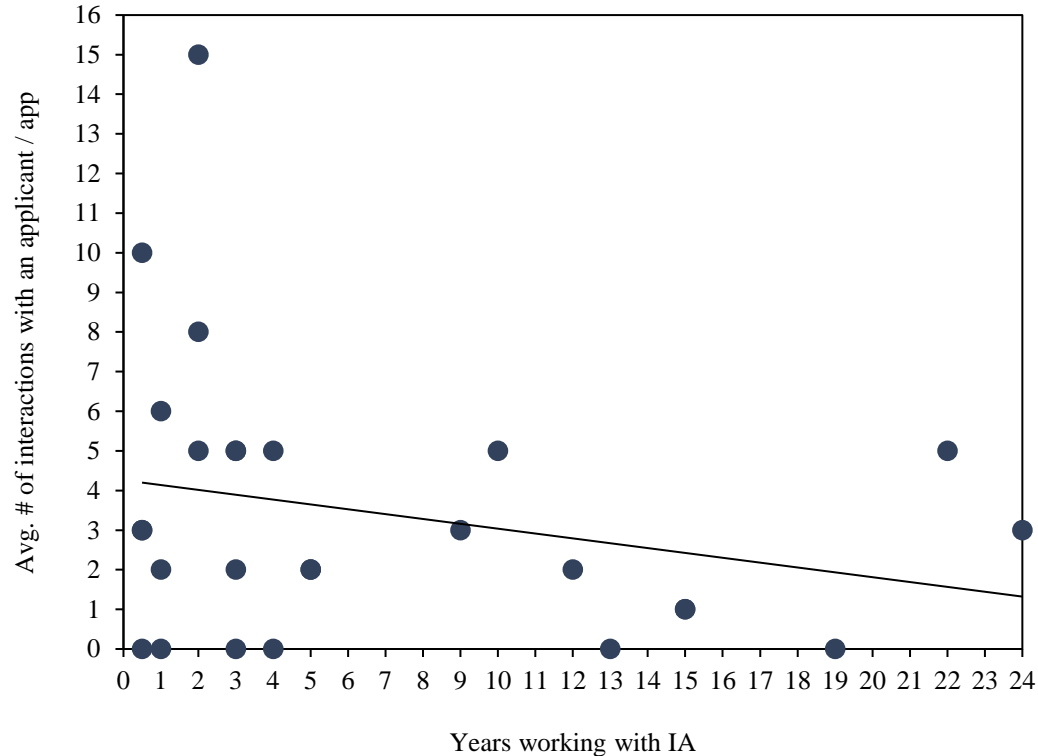


Note: Six team members answered 'Yes' to having different responsibilities in 2022 and provided details
 Source: IA employee activity survey, March 2024

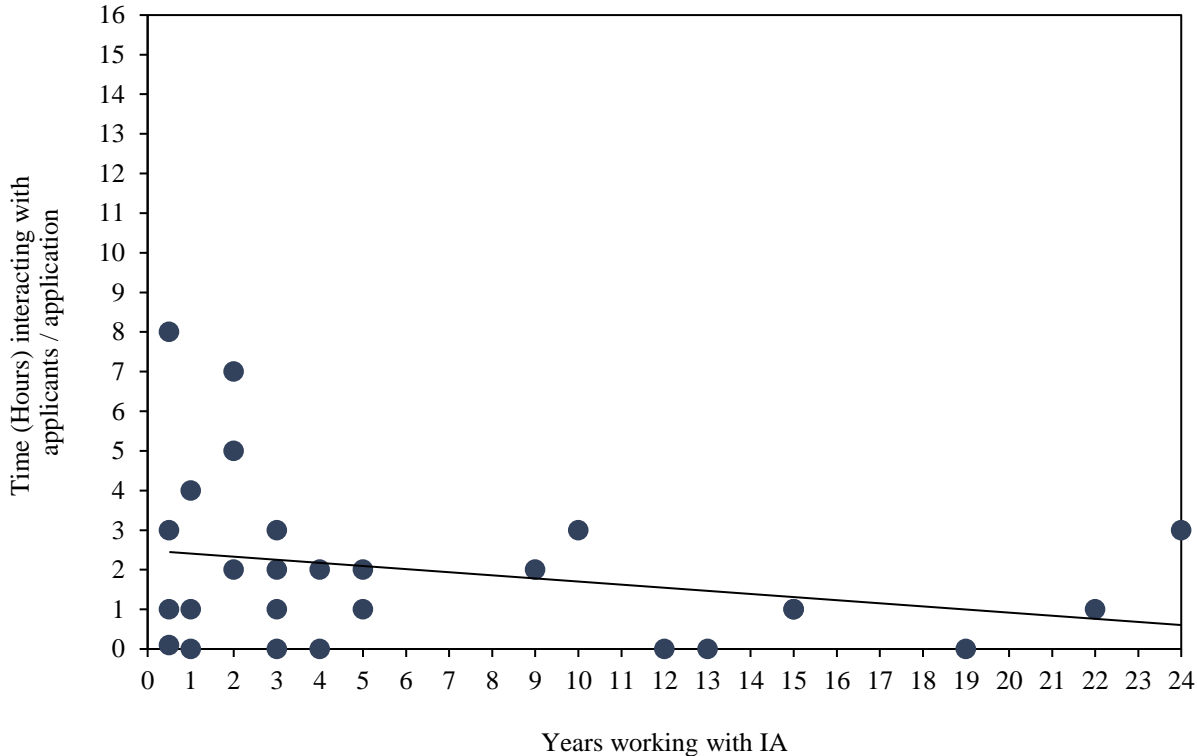


Longer-tenured DMA employees seem to interact less frequently with applicants and spend less interaction time

Years working with IA vs. Avg. # of interactions / app



Years working with IA vs. time interacting with applicant / app



Note: Applicants who have spent <1 year with IA are assumed to have spent 0.5 year for the analysis; The analysis uses 27 DMA team members
 Source: IA employee activity survey, March 2024



Prioritized recommendations



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Project Jaguar has produced 25 recommendations with value ranges and change implications across process, people, and tech

Recommendation name	Recommendation summary	Value	Change Area		
			Process	People	Tech
Decision framework	Create Delegation of Authority (DOA) structure and update RACI to streamline decisions	High			
Process transformation	Automate, streamline, or eliminate process steps from 89 steps in current state by 20-40%	High			
Improved prioritization	Value-based approach to permit approvals that gets rid of FIFO and "squeaky wheel" mentality	High			
360-degree applicant	Database that consolidates an applicant's multiple submissions into one place, using a unique account number/ID number	High			
Applicant data validation	Construct automated data validation and application process control to reduce iteration and increase throughput	High			
Culture	Shape how IA works and lives together; psychological safety and enhanced team dynamics utilizing DISC and the 5 behaviors tools/techniques	High			
Customer service	Support tickets that glue applicant outreach and create single management view, including automated customer service using Generative AI	High			
Decision-making dashboard	Decision-making dashboard for IA leaders to prioritize permits and teams' activities, requiring decision rights at each level	High			
Dynamic staffing model	Provide insights on current and future resourcing requirements; drives scenario planning to ensure clear sight on potential budgetary impacts	High			
Resourcing strategy	Identify additional or re-allocated capacity across teams where needed	High			
SOP management	Create document management system (DMS) for standard operating procedures (SOP) and develop as needed	High			
Value Realization Office	Aggregate and amplify the conservation value of IA through quarterly narratives, providing leadership support needed to justify funding	High			
Website revamp	Update and modernize the website to include easy access educational materials and improved applicant experience	High			
Employee engagement	Empower the IA workforce with regular and transparent feedback mechanisms to hear the "voice of the employee"	Med			
Applicant education	Develop applicant educational materials and push the link to applicants	Med			
Cross-functional comms	Establish cross-functional communication channels with frequent small team "gatherings" to exchange learnings	Med			
Fee recovery	Capture value leaving the organization as fee leakage that go uncollected from applicants	Med			
New hire training	Create customized and structured onboarding and training plans	Med			
Brand build	Advocate for funding with branding campaign on FWSIA as driver of US economy and trade	Med			
Continuous learning	Build training curriculum for employees around capabilities they will need in future state including new technologies and ways of working	Med			
Process playbook	Memorialize "playbook" of what each team member is responsible for to improve transparency and enable mobility, including review cadence	Med			
Budget controls	Establish clear roles and responsibilities of budget controls	Low			
Employee incentive policy	Create standard and clear policy for leaders to incentivize their people with travel, etc.	Low			
ePermit feedback	Use internal support tickets and training to upskill IA on ePermits	Low			
PD standardization	Create transparency and visibility across and into team responsibilities	Low			

Decision framework

Friction identified

Unnecessary process “loops” add time to the process and decrease employee satisfaction, e.g., approval process has multiple loops and is the main area where time is spent in the process. Teams will iterate five, six, seven times on a single approval or denial.

Team does not have proper authority to make key decisions.

Project Jaguar recommendation

Ensure clear accountability within the organization

- Execute Delegation of Authority
- Implement new Responsible, Accountable, Consulted, Informed (RACI) chart

Value

Enabler

- Robust accountability and authority supports the future state process

Investment

- 2 FTEs dedicated over 1 month,** including:
- Program manager
 - Process and implementation support

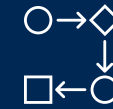
Risks and decisions

Implementing RACI and Delegation of Authority may restrict flexibility for future “special” cases

Accept: Flow through use cases to understand how frequently RACI can be applied and how to pivot when special cases occur

Change area

Process



Change in team authority, measurement and accountability needed to ensure proper use of new authority

People



Memorializing authority can result in some team members feeling loss of agency

Tech



Minimal change impact expected

Reduce unnecessary process “loops” by implementing a Delegation of Authority

Illustrative

Delegation of Authority

Dimensions to determine importance

Role	Organization Importance	Federal Permit	Permit Size	Recon- sideration	Simple, routine findings	Standard response	Exception Expectations
Automatic	Low	No	Small	No	Yes	Yes	None
Processor	Low	No	Small	No	No	No	None
Team Lead	Medium	Yes	Large	No	No	No	<10%
BoP Manager	High	Yes	Large	No	No	No	<10%
DMA Head	Very High	Yes	Large	Yes	No	No	N/a

Authority is delegated to approve permits and applications

Team members are delegated the authority to approve applications and permits when they meet specific, well-defined criteria

Clear definition of accountability in the IA permitting process driven by future state RACI

Person to role-based accountability

Process Steps	Applicant/ Permittee	Team Eagle Lead	Permits Biologist	Legal Instr. Examiner	Team Lead	BoP Manager	DMA Head	Biologist/ Botanist	Branch Manager	DSA Head
Submit Application	R A	I	--	--	--	--	--	--	--	--
Assign Team	--	R A	I	I	I	I	--	--	--	--
Assign Processor	--	I	I	I	R A	I	--	--	--	--
Review Application	--	--	C	C	R A	I	--	R – If finding	C	--
FR Notices	C	R	C	--	I	I	C A	--	--	--
Provide Permit Findings	--	--	R	--	A – if DMA finding	C	C	R	A – if DSA finding	C
Determine Permit Approval	--	--	C	--	R	A	I	I	I	I
Mail Letters to Applicants	I	--	R	--	I	A	I	--	--	--
Permit approval reconsideration	--	--	C	--	C	C	R A			

Commentary

- Accountability lives in the role not with the person
- Single Accountable Party for every process step
- Clear responsibilities
- Reduction of communication requirements
- Empower lead decision making



Process transformation

Friction identified

Process contains bottlenecks and non-value-added activities which slow the process down, and additional quality checks are not efficiently placed leading to unnecessary rework

Project Jaguar recommendation

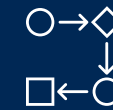
Automate, adjust, or eliminate process steps:

- Automate 17 process steps
- Adjust 11 steps to increase quality checks before key reviews and approval
- Eliminate 19 unnecessary process steps

Change area

Major “change and engage” implementation activity required

Process



People



Team member time to be allocated to recommendation, and resultant coverage required for existing permit workload

Tech



Automated routing of which permits go to which team, and how prioritized they are in the workflows

Value

Reduce processing time of permits and applications by 15-18% (105-130 days on average)

Investment

3 FTEs dedicated over 3 months, including:

- Program manager
- Process and implementation support
- ePermits technologist

Prioritization technology (Priority-based planning integration into enterprise resource planning (ERP) system, scheduling software, etc.)

Risks and decisions

Team member confusion and lack of buy-in could cause issues current with permits and applications

Mitigate: Staged implementation with user acceptance testing (UAT) and compliance monitoring

Reduce processing by 27 - 49 days on average permit by automating key process steps

#	Step	Action	Rationale	Impact
1	Electronically file or mail permit application	Promote electronic filing and consider mail-in fee	Time lost due to manual entry and errors	1 – 2 days
2	Was permit application received by mail?	Promote electronic filing and consider mail-in fee	Time lost due to manual entry and errors	1 – 2 days
3	Applicant information is entered into ePermits manually	Leverage ePermits to reduce manual entry through prioritization and stated processing times	Time lost waiting on manual entry and errors	0.5 - 1 day
4	Review new application from ePermits	Create checklist of review items and provide template	Delays driven by lack of clarity of permit requirements	1 – 2 days
6	Decide which team to assign to according to their specialty	Use priority-based planning technology to route permits and applications	Time lost due to reassignments, lack of priority and delay	2 – 3 days
7	Assign application in ePermits to one of five teams according to their specialty	Use priority-based planning technology to route permits and applications	Time lost due to reassignments, lack of priority and delays	2 – 5 days
12	Assign application to Processor in ePermits	The System automatically assigns processors by role	Deputy managers assign work without informing the team lead, Additionally team will go to previous team leads for support	2 – 3 days
14	Processor receives application assignments through ePermits	Use priority-based planning technology to route permits and applications	Time lost due to reassignments, lack of priority and delays	0.5 – 1 days
15	Review Application Documents	Utilize R:\ checklists in the process, create expectations and controls to ensure they are being used.	Delays driven by lack of clarity of permit requirements	2 – 3 days
17	Legal examiner reviews permits and applications	Enable team review and comments directly to permit legal examiners and biologists	Team adds complexity to the process and delays hand off due to legal hand off and review	0.5 – 1 day
19	Gather information	Enable DSA to route question through ePermits	Information gathering gets stuck due to DMA staffing changes and lack of accountability	7 – 14 days
20	Send to FWS	Automated notification of applicant action and activity provide to DMA and DSA	Team doesn't have visibility when applicant information is received leading to information getting stuck waiting for DMA review and routing to DSA	3 – 5 days
29	Is Federal Register Required for Publishing?	Setup rules to determine FR req. to reduce manual triage	Time spent on activities that could be automated by technology and processes	2– 3 days
30	Prepare for Federal Register Publishing	Leverage shared templates and version control	Time lost due to rework of repeat activities	0.5 – 1 day
31	Publish Federal Register Notice	Leverage shared templates and version control	Time lost due to rework of repeat activities	0.5 – 1 day
33	Denial Letters are Drafted by Biologist	Leverage shared templates and version control in R:\	Time lost due to rework of repeat activities	0.5 – 1 day
41	Setup Permit	Utilize past permits consistently in the process to speed up the set-up process	Time lost due to rework of repeat activities	0.5 – 1 day

Reduce processing by 14 - 33 days on average permit by adjusting process steps

#	Step	Action	Rationale	Impact
9	Permit Processor communicates with assigned team via email/Microsoft teams	This step is adjusted by automation steps	Routing and prioritization technology will send notifications to team members but additional communication will be sent as needed	2 - 5 days
11	Team Lead decides which processor to give application to DSA	This step will be adjusted by delegation of authority	Team needs to set rules around roles and responsibilities to ensure correct routing of applications to processors	1 - 3 days
13	Team lead communicates with processor	This step will be adjusted and reduced by automation . The processor will be responsible only for relaying information not provided by automated tasking in the future state.	Non-automated team lead communication is still crucial in future state	0.5 - 1 day
17	Does this require DSA finding?	Process controls and tracking needs to be put into place to ensure DSA reviews are triggered as early as possible, when needed.	Delayed communication has led to significant delays	1- 3 days
18	Does this require publication in federal register?	This step needs to happen earlier in the process	Delayed communication has led to significant delays	0.5 – 1 day
18	Receive request for additional information	This step will now come directly from ePermits managed by DMA vs. directly from DMA manually pulling information	Delayed communication has led to significant delays	5 – 8 days
19	Provide guidance and recommendations	This step will be adjusted by delegation of authority	This ensures that teams are getting the guidance they need when they need it and that it isn't a blocker or bottleneck to permit process	1 - 3 days
24	Permit Processor communicates with DSA	This step needs to happen earlier in the process	Delayed communication has led to significant delays	1 – 3 days
32	Processor recommends permit approval?	This step will be adjusted by delegation of authority to reduce the number of informal reviews that take place today	Current process lacks clear lines of authority	0.5 – 2 days
37	Update Denial and Approval Letters for Comments	This step will be facilitated through a delegation of authority and new process to prevent multiple informal reviews.	This ensures that teams are getting the guidance they need when they need it and that it isn't a blocker or bottleneck to permit process	0.5 – 1 day
48	Prepare Final Permit	Leverage shared templates and version control	Shared templates and documents will reduce time here	1 – 3 days

Reduce processing by 41 - 62 days on average permit by eliminating process steps

#	Step	Action	Rationale	Impact
8	Create spreadsheet with team assignments and save to R: drive	Use technology to track permits and applications, eliminate manual entry	Manual entry takes review time and leads to mistakes	1 – 3 days
10	Review emails and assignment in ePermits	This step will be eliminated through automation steps	Routing and prioritization technology will provide users with notification	1 – 2 days
17	Scientific Authority works with Processor to Obtain Additional information to Satisfy Criteria for Approval	Eliminate this by enabling DSA to view and use ePermits to ask information of applicants/permittees under the management of DMA (where applicable)	DMA is a key bottleneck for information gathering information from permittees and applicants, there have been cases where information was not routed for over 30+ days	10 – 14 days
21	Prepare for Scientific Authority	This step is unnecessary and is eliminated through steps taken in other steps	Time used to prepare information for DSA hub and spoke system is used vs. integrated team, DSA should receive all information in the form is it received	2 – 3 days
23	Decide if application should be reviewed by Scientific Authority	The need for DSA to review is often missed. This step should have controls in place to ensure it is completed accurate and at the correct time.	If DSA needs to be involved, we should inform, flag and queue that application with DSA as early as possible; however, application not routed until ready for review	6 – 10 days
27	Is additional information required?	Eliminate this step by requiring fields to be completed prior to submission, decline permits without the correction information	Significant time in the process is spent trying to find information that should be required for submission creating bottlenecks and challenges in the process	2 – 3 days
35	Review Denial Letter	This step is seen multiple times in the process and should be done once, clear delegation of authority will reduce iterations	Approval process has multiple loops and is the main area where time is spent in the process. Teams will iterate five, six, seven times on a single approval or denial	1 – 2 days
42	Review Permit Setup	Shared documents and DOA will eliminate need for multiple review	Standard permit setups should have accountability with exception review	1 - 2 days
51	Permits is Finalized	This step is seen multiple times in the process and should be done once, consolidate finalization to a single party. Only if edits recommended were not preformed or if the reviewer has noticed something that got past surname review	Multiple parties work to finalize permits, leading to confusion, permit discrepancies, and delays to team members not having a clear line of authority	1 – 3 day
52	Review Final Permit	This step is seen multiple times in the process and should be done once, clear delegation of authority will reduce iterations	Approval process has multiple loops and is the main area where time is spent in the process. Teams will iterate five, six, seven times on a single approval or denial	2 – 3 days
34/45/49, 36, 46/50	Is permit approved?, Is review required?, Send to Branch Manager (n=3), Provide Comments, Update for Comments (n=2)	This step is seen multiple times in the process and should be done once, clear delegation of authority will reduce iterations, oversight and grammar controls will need to be put in place to maintain permit quality for new staff and during transitional period	Approval process has multiple loops and is the main area where time is spent in the process. Teams will iterate five, six, seven times on a single approval or denial	14 – 17 days



Improved prioritization

Friction identified

Permits that may be more complex or critical are often deprioritized and visibility not provided for leadership. Real-time team and individual workload data is not easily accessible from ePermits.

Project Jaguar recommendation

Introduce systemized way to prioritize permits to reduce the influence of first-in, first-out (FIFO) and "squeaky wheel" mentality. Instead, permits are prioritized by automating several factors such as the urgency, importance, and finding type and complexity, while considering factors such as species welfare, breeding windows, etc.

Value

Enabler

- Results in better conservation outcomes by prioritizing facts such as species welfare
- Increases permit throughput by reducing divergent direction for processing

Investment

2 FTEs dedicated over 2 months, including:

- Program manager
- Process and implementation support

DMA (all teams) and DSA biologist support, as needed

Prioritization technology (Priority-based planning integration into ERP system, scheduling software, etc.)

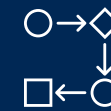
Risks and decisions

Prioritization technology can result in adverse results if not "tuned"

Use parallel prioritization with manual efforts to test efficacy of prioritization technology and adjust weightings and input factors accordingly

Change area

Process



Processors and team leads alike must trust the prioritization method for success – this will require looks “under the hood”

People



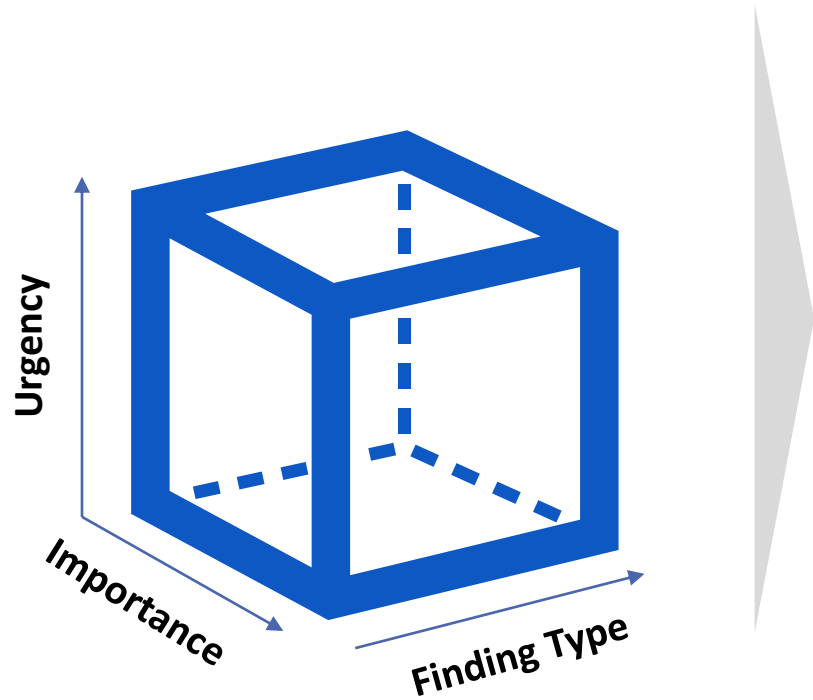
Minimal change impact expected

Tech



Training on prioritization technology will be required and incentives implemented to improve adoption

Process time is reduced by prioritizing against three dimensions of urgency, importance, and finding type



Applications and Permit Priorities

Eagle	Orca	Raptor	Panthera	Aloe	Meerkat
Priority 1	Priority 1	Priority 1	Priority 1	Priority 1	Priority 1
Priority 2	Priority 2	Priority 2	Priority 2	Priority 2	Priority 2
Priority 3	Priority 3	Priority 3	Priority 3	Priority 3	Priority 3
Priority 4	Priority 4	Priority 4	Priority 4	Priority 4	Priority 4
....

This recommendation provides faster assignments and clear communication of priorities by incorporating Team Eagle’s best practices and tacit knowledge into repeatable model

360-degree applicant

Friction identified

Applicants are frustrated with delayed or “lost” submissions, particularly as applications are converted to permits

Project Jaguar recommendation

Build database that consolidates an applicant's multiple submissions into one “single source of truth”, using a unique account/ID number. Teams can use the database to input notes regarding their managed application to provide transparency and awareness across multiple teams

Value

Enabler

- Provides complete transparency across an applicant’s submissions, tracking from end-to-end, for internal coordination
- Improve applicant experience and satisfaction

Investment

2 FTEs dedicated over TBD months, including:

- Program manager
- ePermits technologist

Applicant management system, similar to customer relationship management (CRM)

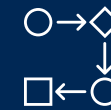
Risks and decisions

None

Change area

Minimal change impact expected

Process



People



Minimal change impact expected

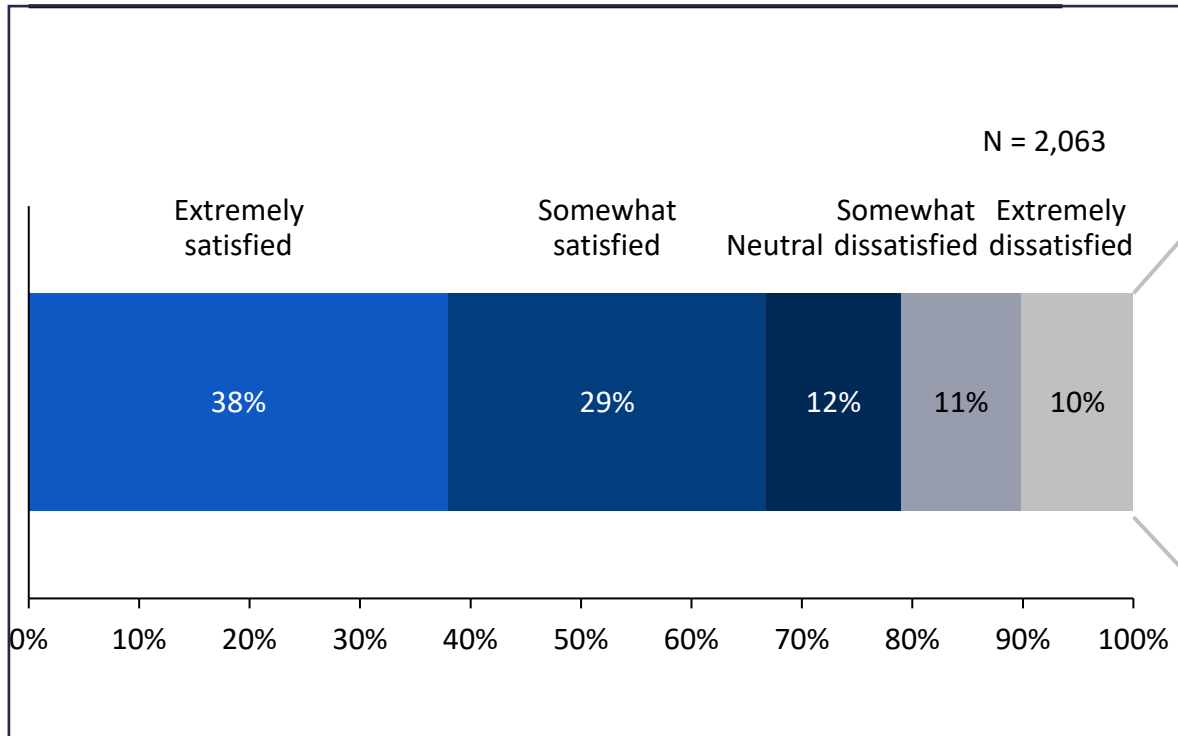
Tech



Requires end-to-end tracking of the application and permit, as well as improved data validation and rigor

Dissatisfied applicants – the vocal minority – often criticize application visibility and end-to-end tracking

Q: How satisfied are you with ePermits?



Source: ePermits customer satisfaction survey

Verbatims

- *"Applications that Conservation Force submits often disappear from the ePermits portal after submission, indicating a problem where application data is lost or not properly transitioned to the next stage in the permitting process."*
- *"The list of applications that are presented on the ePermits portal is unreliable and does not show a comprehensive list of all of our applications, suggesting that some application data may be lost or not correctly integrated into the user's account view."*
- *"When the FWS updates Conservation Force on issuing a CITES import permit, we would like them to provide an electronic copy for our records, while the client is mailed the original. This request implies that there may be issues with maintaining a consistent record of application data through to the issuance of permits."*
- *"Application and permit numbers being different makes navigating the site and permits confusing. After submitting for renewal, the permits office still never received our information, even though the site said it was pending for months. This indicates that application data submitted does not always correctly convert or progress to the permit stage."*

Application data validation

Friction identified

Incomplete and errant entries in applications cause non-value add time spent with rework, reassignments and unnecessary iterations with applicant

Project Jaguar recommendation

Introduce robust data validation and requirements, incorporating the lessons learned of incomplete data on the backend with improvements to the applicant interface and experience

Value

1-5k employee hours annually by reducing the interactions between IA and applicants

Investment

2 FTEs dedicated over 3 month, including:

- Program manager
- Process and implementation support

User testing support, as needed

Risks and decisions

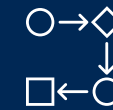
Restricting applicant entry can lead to frustration and potentially lower applicant satisfaction

Mitigate: Collect applicant feedback on which fields are most useful / most used before adjusting

Change area

Expect to reduce the amount of upfront process loops

Process



People



Employees expected to spend significantly less time interacting with applicants – can feel “cold”

Tech



Data validation and guardrails must be constructed within the frontend of ePermits and flow through functionality on the backend

Culture

Friction identified

Pockets of division- and team-based cultures within IA pose barriers for collaboration and psychological safety

Project Jaguar recommendation

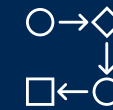
Embark on a culture discovery that begins with personal development profiles and assesses the current culture landscape and produces the future mindset North Star and activation roadmap to reach it

Note: TJG is an authorized partner for DiSC and The Five Behaviors training

Change area

Minimal change impact expected

Process



People



Culture is one of the most significant changes an organization can undergo for its people – but when done right, can elevate performance across tangible and intangible impact

Tech



Minimal change impact expected

Value

Enabler

- Decreased turnover
- Improved employee satisfaction and buy-in
- Enhanced collaboration and cross-team identity

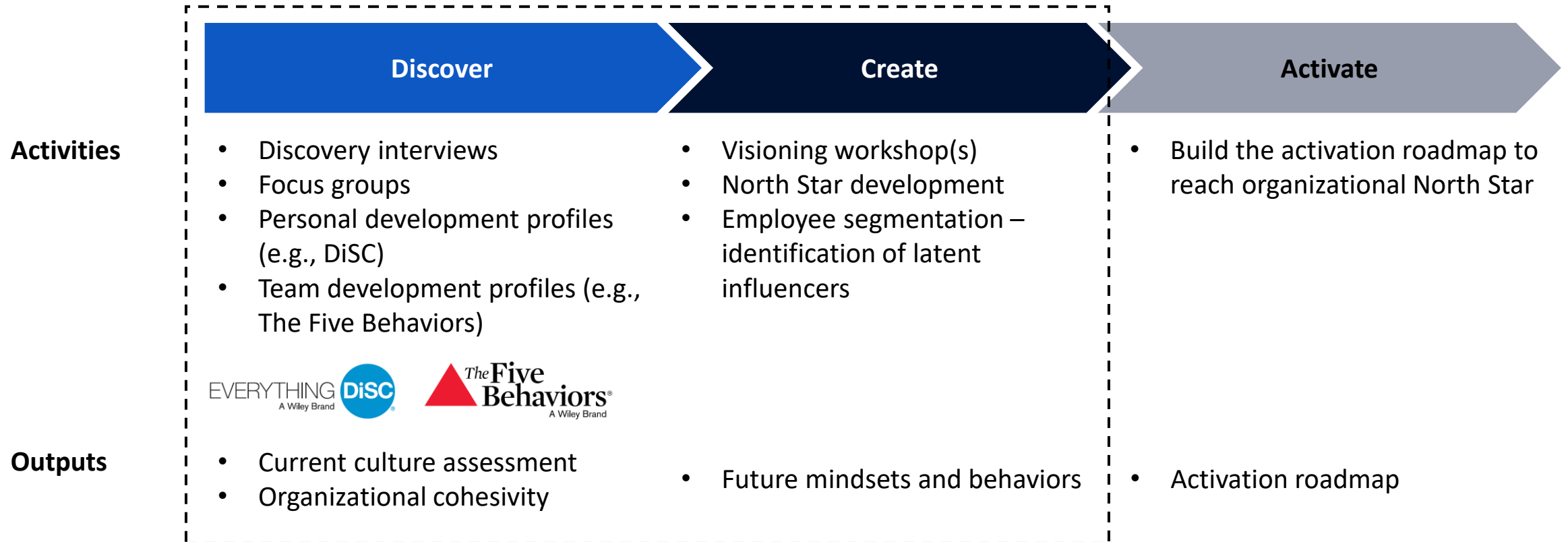
Investment

- **DiSC training and certification** for TBD IA leaders and support
- **The Five Behaviors training and certification** for TBD IA leaders and support

Risks and decisions

None

Personal and team development profiles provide foundation to create and activate culture



Note some activities in Discover and Create proposed to take place at 2024 retreat

Customer service

Friction identified

Primarily due to workload and capacity constraints, IA has lost the ability to remain “high touch” and focused on serving all its customers – the applicant, the species, and society

Project Jaguar recommendation

Implement standard off-the-shelf (OTS) software solution with capabilities like automated and AI-enabled chatbot to allow the IA to serve its customers at scale

Value

Enabler

- Improves applicant satisfaction

Investment

\$10-100k annual subscription for customer service technology (e.g., Zendesk), depending on capabilities and features deployed like generative AI (e.g., Ultimate.ai)

Risks and decisions

Chatbots do not always provide responses in the preferred “voice” of the agent (or biologist)

Mitigate: Use parallel customer service efforts to assess the “voice” of technology with pilot group before scaling up to organization

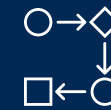
Change area

Removing some DMA interaction with applicants may see pushback

Steps can be automated or streamlined once the customer service solution is running

Training and onboarding of customer service technology will be required

Process



People

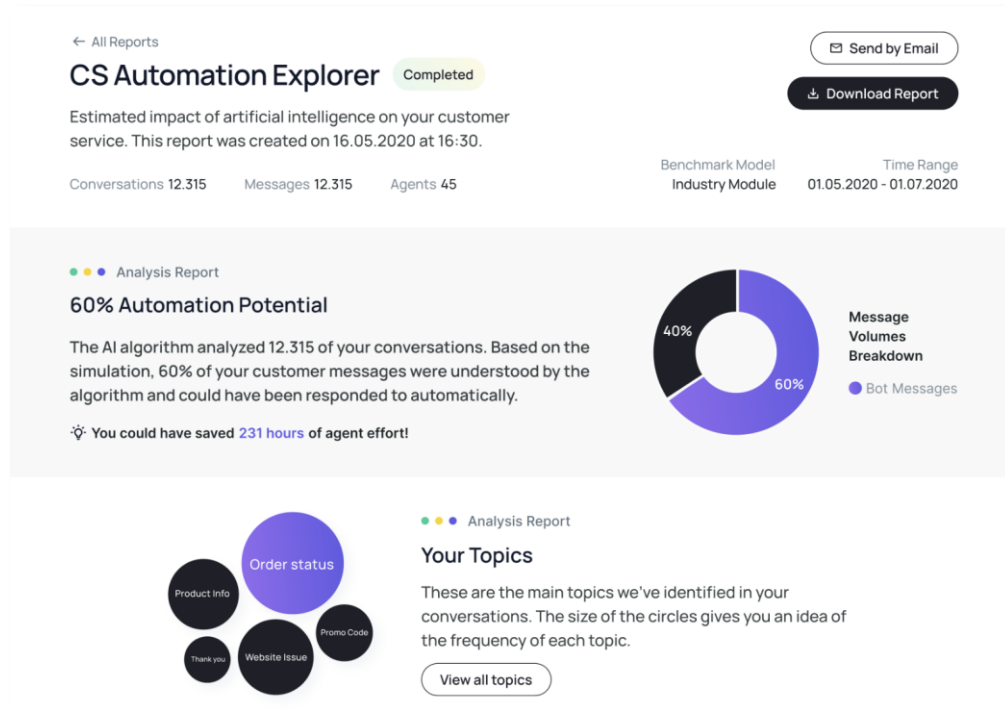


Tech



AI and automation technology can help maintain applicant experience while focusing effort on other value-add activities

Customer service automation report Illustrative example only



Source: Ultimate.ai, Zendesk

Commentary

- **Automate repeatable customer interactions** while providing high level of service
- **Use generative AI to produce relevant, customized messaging** for variety of use cases
- **Integrate AI and automation technology** with numerous other platforms/vendors, such as Zendesk, as applicable

Decision-making dashboard

Friction identified

Permits that may be more complex or critical are often deprioritized and visibility not provided for leadership. Real-time team and individual workload data is not easily accessible from ePermits

Project Jaguar recommendation

Build dashboard that provides leadership visibility into the current state of the permit process and performance

Value

Enabler

- Prevent permits from slipping through the cracks
- Visualize fee collection data, to enable collection
- Understand the rate of permits and applications entering and exiting the pipeline

Investment

Data visualization capability (e.g., PowerBI, Tableau, etc.) – note PowerBI is part of Microsoft Suite

Risks and decisions

Adopting new tools can result in slow/no change effort

Mitigate: Hold targeted training sessions and over-the-shoulder days to increase comfortability of team

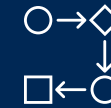
Change area

Dashboard to be the place where leaders go to drive decisions, likely requiring memorialized step in process

Allows leaders understanding of the current state of the permits and applications pipeline

New dashboard built and continually refined to meet the needs of the organization

Process



People

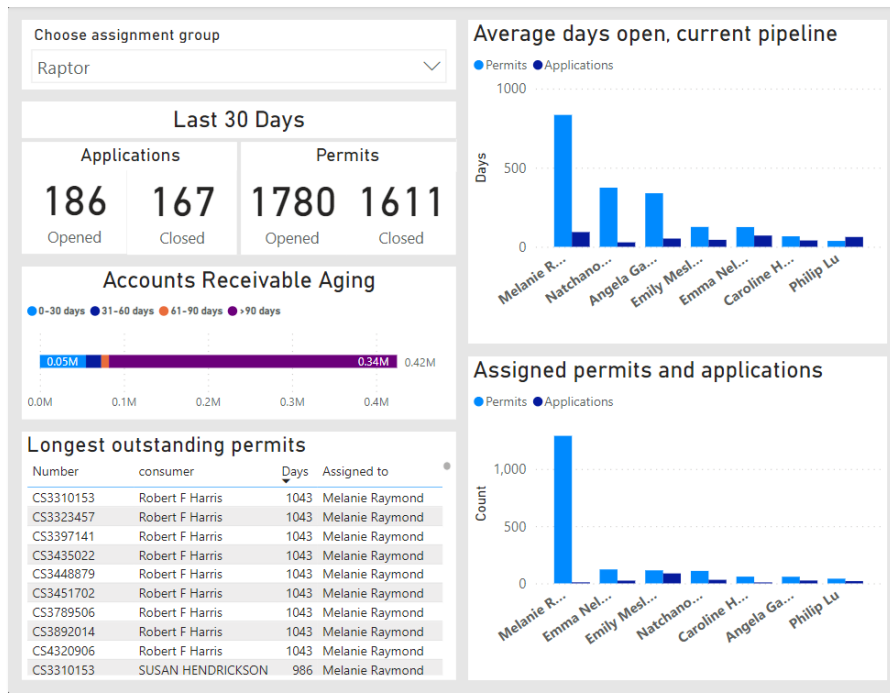


Tech



Dashboard enables leaders to leverage real-time data for better decision-making

Decision-making dashboard Illustrative example only



Source: ePermits

Commentary

Features

- **Real-time data sync:** Integrate with ePermits to reflect up-to-date information, ensuring that decisions are based on the latest data
- **Customizable views:** Tailor the dashboard to showcase metrics that align with strategic goals, such as application processing times, collection of fees, and workload distribution
- **Interactive elements:** Drill down into the specifics with interactive charts and filters, allowing for a granular analysis of data points such as the "Longest outstanding permits"
- **Performance tracking:** Visualize key metrics to provide better understanding of process efficiency

Benefits

- **Enhanced visibility:** Gain a comprehensive overview of DMA operations, preventing permits and applications from being overlooked
- **Increased efficiency:** Streamline permit processing by using data to prioritize critical tasks and allocate resources against them effectively
- **Improved accountability:** Set clear expectations and track individual and team performance against benchmarks
- **Strategic planning support:** Utilize historical and current data trends to forecast future needs and plan accordingly

Dynamic staffing model

Friction identified

Changing environment and regulatory landscape makes resource planning challenging

Project Jaguar recommendation

Introduce a staffing model that incorporates both controllable and dependent factors that is designed to:

- Provide insights on current and future resourcing requirements
- Drive scenario planning to ensure clear sight on potential budgetary impacts

Value

Enabler

- Improves year-over-year consistency and planning process for leadership

Investment

2 FTEs dedicated for 2 weeks

- quarterly, including:
- Program manager
 - Analyst

DMA and DSA Head support, as needed

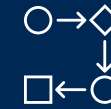
Risks and decisions

None

Change area

Minimal change impact expected

Process



People



Improved staffing projections can improve employee experience and enable mobility

Tech



Minimal change impact expected

Leverage dynamic staffing models to better predict changes in workload according to internal/external factors

Factors

Controllable factors

- Employees and headcount
- Budget allocation

External factors

- Labor indices
- Number of applications and permtis
- Policy

Analyses

Trend analysis

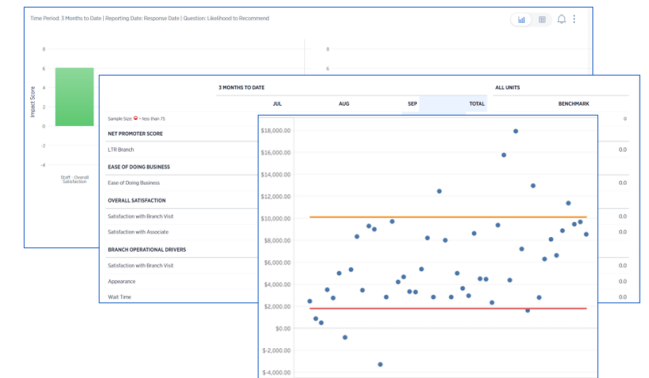
- Report robust trends in real-time to understand changes in results

Variance analysis

- Review of changes between periods to understand differences in categories

Statistical analysis

- Conduct Regression analysis
- Understand categorical metrics
- Utilize standard deviations and interquartile ranges



Resourcing strategy

Friction identified

Lack of staff capacity coupled with increasing inflow of permit applications have led to delayed processing of applications and overwhelmed IA team members

Project Jaguar recommendation

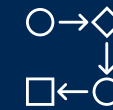
Strategically increase and manage resources to more efficiently process applications and permits while reducing strain on the existing teams

- Identify the needed additional capacity (team members) by level and title
- Examine the need to re-allocate team members across teams where needed and appropriate

Change area

Minimal change impact expected

Process



People



Increase visibility of each team member's workload and resultant implications for future state resourcing and organization

Tech



Minimal change impact expected

Value

Reduce avg processing time of permits and applications by 2-5% (20-40 days on average)

Improve employee satisfaction and reduce "burnout"

Investment

2 FTEs dedicated over 1 month, including:

- Program manager
- Organizational design specialist

DMA and DSA Head support, as needed

TBD FTEs to level capacity

Risks and decisions

Lack of qualified candidates may delay completion timeline

Accept: Explore untapped and diverse pipelines of talent

SOP management

Friction identified

More education and SOP rigor is requested to utilize ePermits effectively, and there is gap between required and actual and user competency

Project Jaguar recommendation

Create document management system (DMS) for standard operating procedures (SOP) and develop SOP as needed / to be evaluated

Value

Enabler

- Reduce time spent by more tenured employees on training and guiding new hires and transfers

Investment

2 FTEs dedicated for 3 months, including:

- Program manager
- ePermits specialist
- ePermits technologist

DMA (all teams) and DSA biologist support, as needed

Risks and decisions

Structured and prebuilt SOPs can result in loss of “tribal” knowledge

Accept: The benefit of institutionalizing knowledge outweigh maintaining with small group of more tenured employees

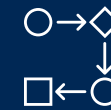
Change area

Route employees needing training to centralized system

Minimal change impact expected

Requirement to build and maintain DMS with robust taxonomy

Process



People



Tech



Value Realization Office

Friction identified

- Biologists are spending time writing conservation narratives versus making scientific findings
- Limited transparency to government on conservation value provided by IA, therefore hindering appropriation of funds

Project Jaguar recommendation

Aggregate and amplify the conservation value of IA through quarterly narratives

Value

- TBD**
- Enhanced visibility and articulation of conservation value

Investment

- 2 FTEs dedicated for 2 weeks** quarterly, including:
- Program manager
 - Communications specialist
- DMA and DSA Head support**, as needed

Risks and decisions

None

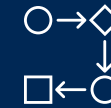
Change area

Examples of conservation need value need to be consistently and rigorously measured

Biologists able to spend less time writing narratives and more time making findings

Improvements to technology helpful tying to conservation value to secure additional funding

Process



People



Tech



Website revamp

Friction identified

External stakeholder interviews consistently identify the website as pain point on the applicant experience

Project Jaguar recommendation

Update and modernize the website to include easy access educational materials, guidance, etc. with best-in-class digital marketing content

Value

Enabler

- Enhance applicant experience

Investment

TBD web design specialist

Risks and decisions

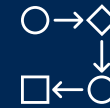
Modifying or moving access links around on the website can be jarring to experienced applicants

Accept: Benefits of improving website functionality outweigh maintaining existing structure

Change area

Minimal change impact expected

Process



People



Tech



Minimal change impact expected

The website requires best practice SEO, searchability, and digital content

Process playbook

Friction identified

Lack of process clarity drives key delays and team needs supporting information to make process more smooth

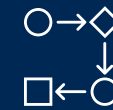
Project Jaguar recommendation

Create process playbook to enable process changes and enable speed an efficiency in the process

Change area

Major “change and engage” implementation activity required

Process



People



Minimal change impact expected

Tech



Minimal change impact expected

Value

Enablement of process opportunities above accounting for 25% - 30% reduction in processing time

Investment

1 FTEs, dedicated over 3 months for ~200 hours, incl.:

- Process and implementation support

Risks and decisions

Team member confusion and lack of buy-in could cause issues current with permits and applications

Mitigate: Staged implementation with user testing and compliance monitoring

Phase 2 initiatives



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The Project Jaguar Phase 2 initiatives are designed to deliver value for IA and its stakeholders

Employee value

- Improved employee satisfaction
- Reduced churn
- Enhanced collaboration and cross-team identity
- Better tracking of permits and applications
- More easily accessed procedures

Time value

- Reduced processing time of permits and applications
- Reduced number of reassignments
- Streamlined interactions with applicants



Conservation value

- More intentional prioritization on species welfare
- Improved consistency and rigor in planning process

Applicant value

- Improved applicant satisfaction
- Enhanced applicant experience
- Increased permit throughput
- More transparency into applications

The prioritized recommendations are driving the creation of five initiatives in Phase 2

Initiative	Recommendation name	Recommendation summary	Value
Process Improvement	Decision framework	Create Delegation of Authority (DOA) structure and update RACI to streamline decisions	High
Process Improvement	Process transformation	Automate, streamline, or eliminate process steps from 89 steps in current state by 20-40%	High
Decision-making Dashboard	Improved prioritization	Value-based approach to permit approvals that gets rid of FIFO and "squeaky wheel" mentality	High
Customer Centricity	360-degree applicant	Database that consolidates an applicant's multiple submissions into one place, using a unique account number/ID number	High
Customer Centricity	Applicant data validation	Construct automated data validation and application process control to reduce iteration and increase throughput	High
Culture	Culture	Shape how IA works and lives together; psychological safety and enhanced team dynamics utilizing DISC and the 5 behaviors tools/techniques	High
Customer Centricity	Customer service	Support tickets that glue applicant outreach and create single management view, including automated customer service using Generative AI	High
Decision-making Dashboard	Decision-making dashboard	Decision-making dashboard for IA leaders to prioritize permits and teams' activities, requiring decision rights at each level	High
Staffing Model Detailed Design	Dynamic staffing model	Provide insights on current and future resourcing requirements; drives scenario planning to ensure clear sight on potential budgetary impacts	High
Staffing Model Detailed Design	Resourcing strategy	Identify additional or re-allocated capacity across teams where needed	High
Process Improvement	SOP management	Create document management system (DMS) for standard operating procedures (SOP) and develop as needed	High
Customer Centricity	Value Realization Office	Aggregate and amplify the conservation value of IA through quarterly narratives, providing leadership support needed to justify funding	High
Customer Centricity	Website revamp	Update and modernize the website to include easy access educational materials and improved applicant experience	High
--	Employee engagement	Empower the IA workforce with regular and transparent feedback mechanisms to hear the "voice of the employee"	Med
--	Applicant education	Develop applicant educational materials and push the link to applicants	Med
--	Cross-functional comms	Establish cross-functional communication channels with frequent small team "gatherings" to exchange learnings	Med
--	Fee recovery	Capture value leaving the organization as fee leakage that go uncollected from applicants	Med
--	New hire training	Create customized and structured onboarding and training plans	Med
--	Brand build	Advocate for funding with branding campaign on FWSIA as driver of US economy and trade	Med
--	Continuous learning	Build training curriculum for employees around capabilities they will need in future state including new technologies and ways of working	Med
Process Improvement	Process playbook	Memorialize "playbook" of what each team member is responsible for to improve transparency and enable mobility, including review cadence	Med
--	Budget controls	Establish clear roles and responsibilities of budget controls	Low
--	Employee incentive policy	Create standard and clear policy for leaders to incentivize their people with travel, etc.	Low
--	ePermit feedback	Use internal support tickets and training to upskill IA on ePermits	Low
--	PD standardization	Create transparency and visibility across and into team responsibilities	Low

The prioritized recommendations are driving the creation of five initiatives in Phase 2

Phase 2 initiatives



Goal

Provide insights on current and future resourcing requirements

Shape how IA works and lives together

Optimize application and permitting processes

Become stewards of the external stakeholders including applicants, species, and society

Instill rigor in prioritization and measurement

Prioritized recommend.

- Dynamic staffing model
- Resourcing strategy

- Culture

- Decision framework
- Process transformation
- SOP management
- Process playbook

- 360-degree applicant
- Applicant data validation
- Customer service
- Website revamp
- Value Realization Office

- Improved prioritization
- Decision-making dashboard

Cross-Initiative: Program and Change Management

Deliverables, key questions, and metrics – Staffing Model

Detailed Design

Deliverables	Key questions	Metrics
Scenario-based staffing model	<ul style="list-style-type: none"> • What factors have impacted our staffing model, both internal and external? • How are those factors projected to change in the future? • What scenarios should we develop and plan for? • How can we systematically and dynamically update for future staffing? 	
Resource allocation methodology	<ul style="list-style-type: none"> • How should capacity and capabilities be allocated across the organization? • What are the appropriate levels of resourcing required? 	<ul style="list-style-type: none"> • Employee satisfaction • Permit processing time
Future capability framework	<ul style="list-style-type: none"> • What capabilities will IA require in the future? 	
Employee strategy and vision	<ul style="list-style-type: none"> • What is the employee value proposition of IA? 	

Activity and implementation plan – Staffing Model Detailed Design

Activity	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
Collect external and market data expected to impact future demand	█											
Evaluate internal data historically impacting demand	█											
Prepare and facilitate workshop on the future state of staffing and impact factors with IA team leads and leadership		█										
Forecast future demand and associated resourcing requirements (and metrics) based on historical/market data			█	█	█							
Develop future scenarios (demand and associated resourcing requirements) based on varying assumptions					█	█	█					
Build scenario-based staffing model						█	█	█				
Provide and standardize inputs into annual planning process							█	█				
Evaluate project impact factors where possible and adjust								█	█	█		
Hand over scenario-based staffing model to IA leadership											█	█
Meet with team leads to estimate gap between current and expected capacity, given constraints and desired workload	█	█										
Meet with team leads to estimate gap between current and expected capabilities	█	█										
Develop future capability framework using best practices from commercial and/or government organizations			█	█	█							
Consolidate findings and meet with leadership to evaluate overall resourcing capacity and capability gaps					█	█	█					
Overlay capacity constraints with expected demand growth							█	█	█			
Define resourcing strategy and allocation methodology, including cross-team solutions for capacity and capabilities								█	█	█		
Obtain alignment from team leads on proposed resourcing strategy and model											█	█

1
Future state of
staffing alignment

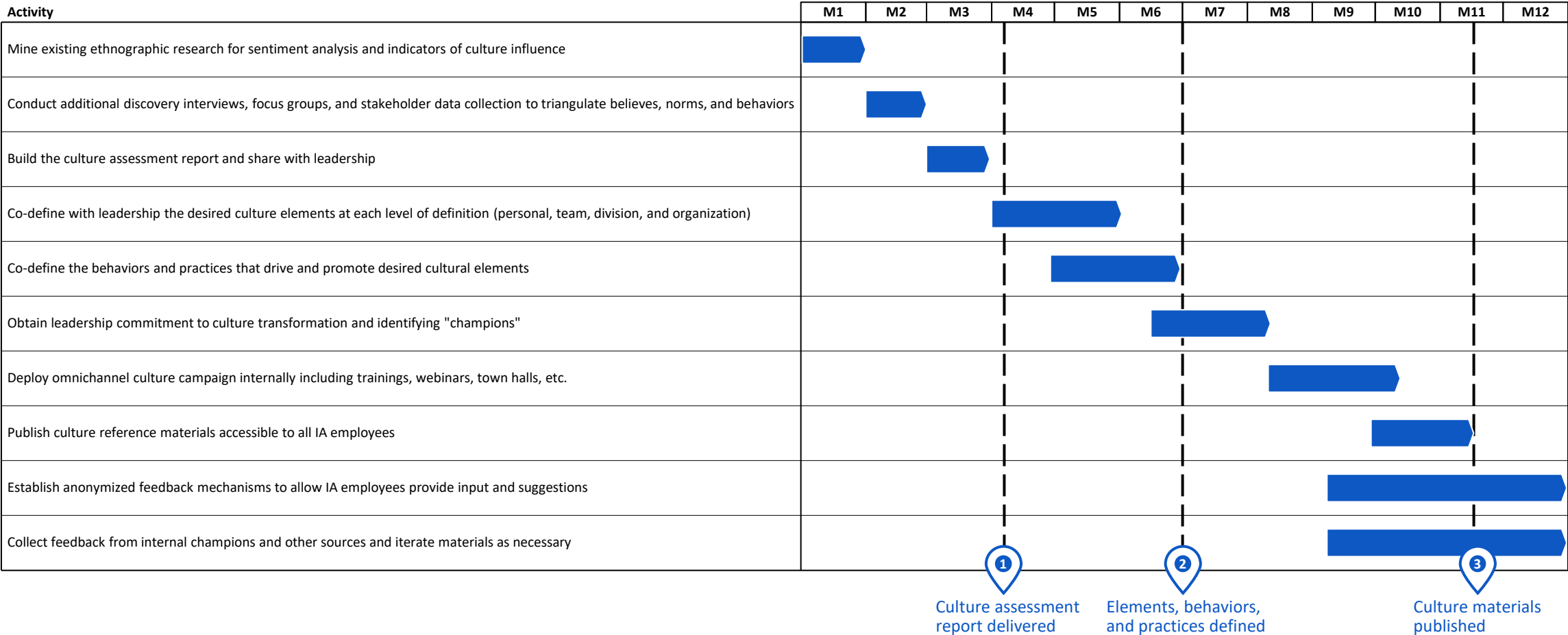
2
Scenario and
model review

3
Resourcing
strategy review

Deliverables, key questions, and metrics – Culture

Deliverables	Key questions	Metrics
Current state culture report	<ul style="list-style-type: none"> • What are the current micro-cultures existing in IA? How are they building on or conflicting with one another? • What is the perception of current culture? • What is the sentiment towards current culture? 	
Personal and organizational development assessment (DiSC, 5 Behaviors)	<ul style="list-style-type: none"> • What are each employee’s “primary emotions” and behavioral responses? • What are each team’s level of “cohesivity” and performance? 	<ul style="list-style-type: none"> • Employee churn • Employee satisfaction
Future state culture alignment and setting	<ul style="list-style-type: none"> • What are the desired culture elements (e.g., trust, collaboration, psychological safety) at each level of definition (i.e., individual, team, division, organization)? • What are the desired behaviors and practices to drive these elements? 	
Culture playbook	<ul style="list-style-type: none"> • How can we reinforce the future state culture going forward? 	

Activity and implementation plan – Culture

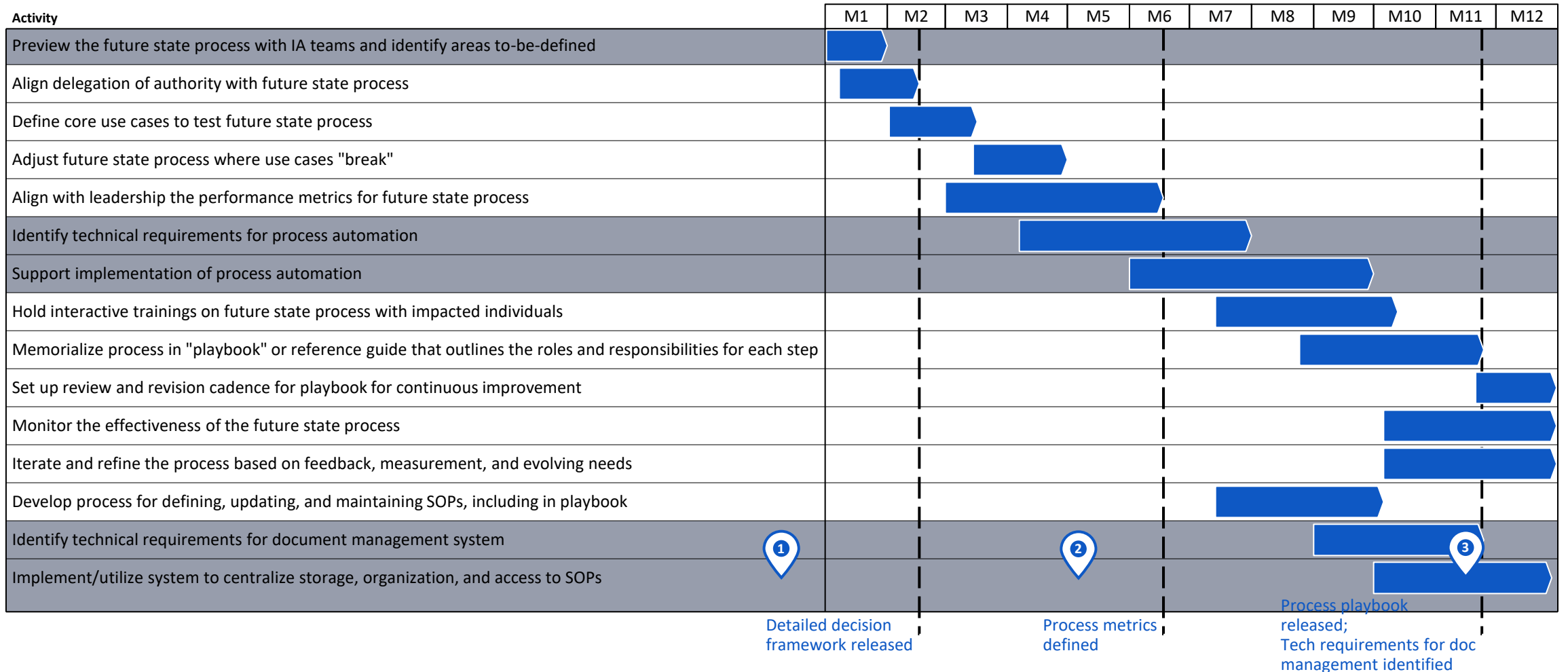


Deliverables, key questions, and metrics – Process Improvement

Deliverables	Key questions	Metrics
Detailed decision framework	<ul style="list-style-type: none"> Which team members are delegated authority to approve permits and applications, and under which criteria? What roles are defined to be Responsible, Accountable, Consulted, or only Informed in future state process? 	
Future process playbook	<ul style="list-style-type: none"> Where can employees find information on use cases, metrics, sub-processes, etc.? How can we reinforce the future state process going forward? 	<ul style="list-style-type: none"> Permit processing time Count of reassignments Employee satisfaction
SOP governance playbook	<ul style="list-style-type: none"> What is the process to identify, develop, and maintain SOPs? 	
Document management system requirements and deployment	<ul style="list-style-type: none"> What are the requirements for document management system for SOPs? 	

Activity and implementation plan – Process Improvement

Align or accelerate ePermits activity



Deliverables, key questions, and metrics – Customer Centricity

Deliverables	Key questions	Metrics
Applicant management system requirements and deployment	<ul style="list-style-type: none"> What are the requirements for applicant management system? 	
Customer service technology requirements and deployment	<ul style="list-style-type: none"> What are the requirements for customer service technology? 	<ul style="list-style-type: none"> Applicant satisfaction Application processing time Count of errant/ incomplete applications Count of conservation value narratives published Sentiment of conservation value narratives published
Website applicant experience assessment	<ul style="list-style-type: none"> How is the website (external and ePermits) content performing and serving the applicant experience? What enhancements are recommended? 	
Website applicant experience design	<ul style="list-style-type: none"> What is the desired applicant experience, and how can the website (external and ePermits) support? 	
Conservation value narratives	<ul style="list-style-type: none"> What value is being driven by IA? How can we systematically communicate that to all stakeholders? 	

Activity and implementation plan (1/2) – Customer Centricity

Align or accelerate ePermits activity

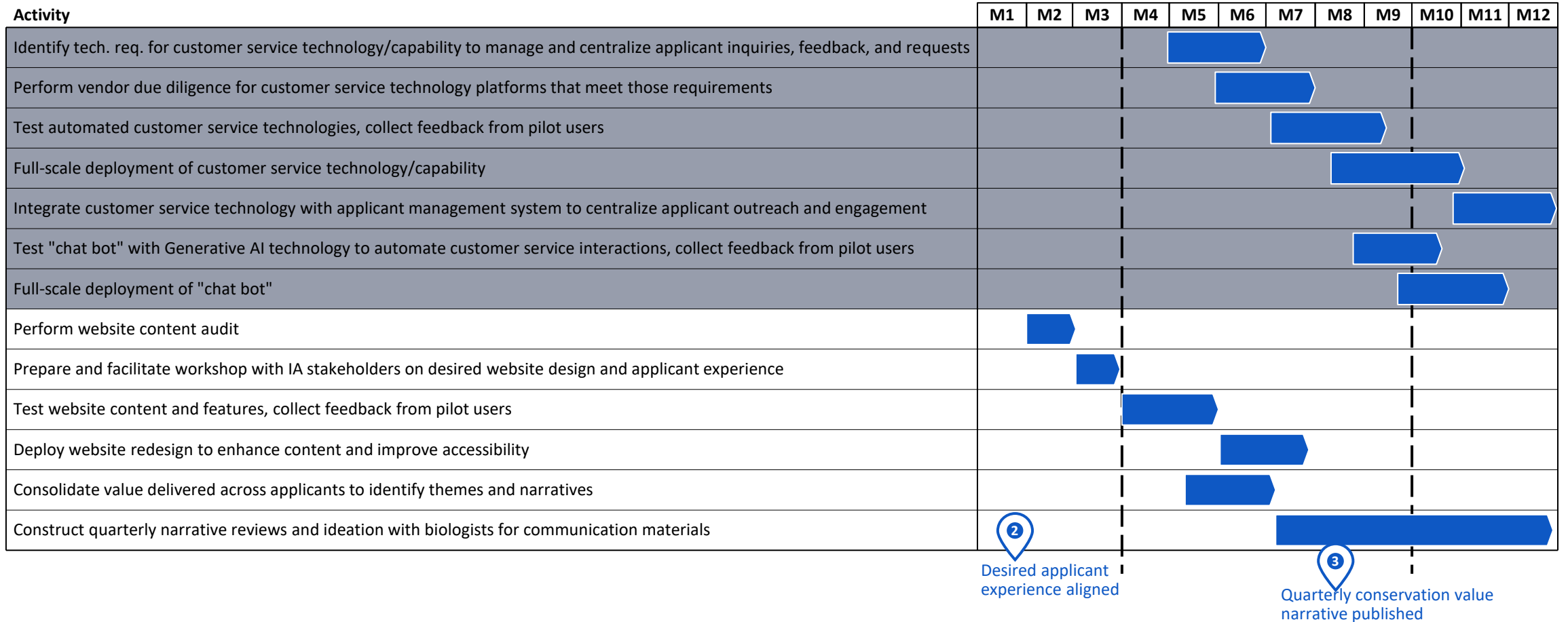
Activity	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
Perform audit of incomplete and errant applications to identify root causes in application system	▶											
Define business rules and validation criteria to address root causes		▶										
Test defined rules through use cases with core team members and application process experts			▶									
Establish automatic review to verify the accuracy, completeness, and consistency of applicant data			▶									
Outline applicant management process and benefits with single source of truth, including typical value delivered			▶									
Identify technical requirements for applicant management system				▶								
Perform vendor due diligence for applicant management system providers that meet those requirements					▶							
Test applicant management system, collect feedback from pilot users						▶						
Full-scale deployment of applicant management system								▶				



Applicant validation criteria defined

Activity and implementation plan (2/2) – Customer Centricity

Align or accelerate ePermits activity



Deliverables, key questions, and metrics – Decision-making Dashboard

Deliverables	Key questions	Metrics
Prioritization methodology	<ul style="list-style-type: none"> How should we prioritize applications and permits against urgency, importance, and type of finding? How can we ensure we maximize value of conservation, employee, and applicant through prioritization? 	<ul style="list-style-type: none"> Permit processing time Count of permits processed Employee (leadership) satisfaction Applicant satisfaction
Prioritization technology requirements and deployment	<ul style="list-style-type: none"> What are the requirements for prioritization technology? 	
Interactive leadership dashboard	<ul style="list-style-type: none"> How can leadership be empowered to make data-driven decisions in near-real-time? 	

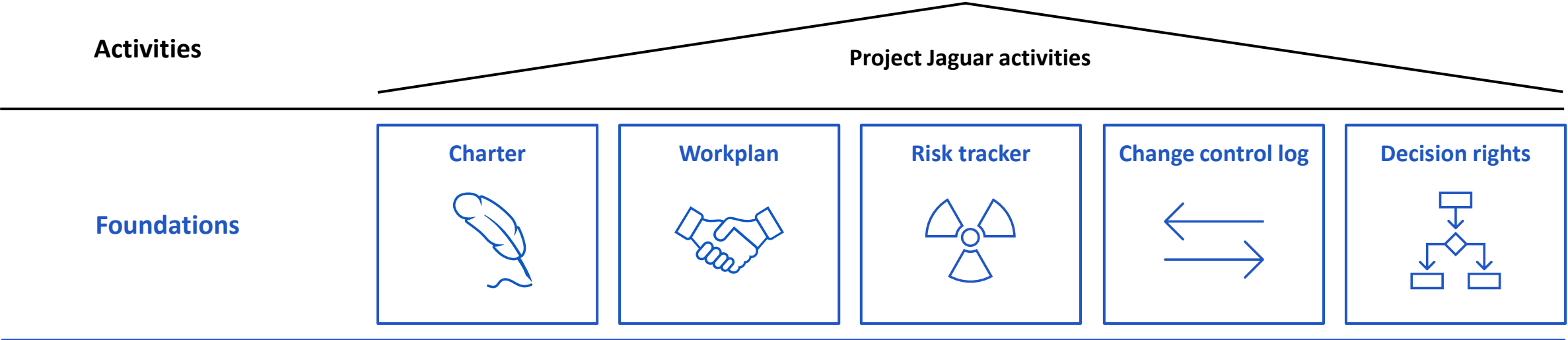
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The Project Management (PM) foundations are set to provide the infrastructure for Project Jaguar activities





The Jandor Group

A Service-Disabled Veteran-Owned Small Business

