

# Management Partners



February 6, 2018

Mr. Dave Chardavoyne  
General Manager  
Monterey County Water Resources Agency  
1441 Schilling Place  
Salinas, CA 93901

Dear Mr. Chardavoyne:

Management Partners is pleased to submit this proposal to conduct phase one of a comprehensive strategic planning process for the Monterey County Water Resources Agency. The first phase consists of a resources and organizational assessment, which will create a baseline for the strategic plan and accompanying business plan. Phase two will be the preparation of a multi-year strategic plan with an accompanying implementation business plan.

The first phase will result in clear objectives as well as cost information for Agency projects and programs, along with recommendations for methods of optimizing the efficiency and effectiveness of the Agency. Our project approach for phase one and descriptions of deliverables are provided below. Before describing our approach to this project, I'd like to tell you about our firm.

## **About Management Partners**

Management Partners was founded in 1994 with a specific mission to help local government leaders improve their service to the public. Since then we have worked with cities, counties, towns, and special districts of all sizes across the United States to help them work more effectively and run more efficiently. We offer a balance of perspectives with a practitioner's bias and a proven track record of successful consulting engagements. This experience gives us a sensitivity that produces positive outcomes. We are proud to say that as a result of our quality work, many of our clients ask us to complete subsequent assignments. Ask our clients and they'll tell you:

<b>We Know Local Government</b>	Our associates have served in local governments, so we have a deep understanding of the operating and political environments in which you work.
<b>We Take a Collaborative Approach</b>	We consider ourselves part of your team and strive to ensure our work supports your overall corporate strategy and goals.
<b>We Have Extensive Experience</b>	Each of our more than 80 associates is an expert in one or more service areas, and our firm has assisted hundreds of jurisdictions in 42 states.
<b>We Have Developed Proven Methodologies</b>	We understand the importance of a holistic approach to improving organizations, using field-tested techniques for each aspect of the work.
<b>Our Work Plan Is Tailored to Your Needs</b>	Each of our projects is individually tailored to our client's unique needs, starting with a careful learning process.
<b>We Take Pride in the Quality of Our Work</b>	Our internal processes ensure first-rate, complete staff work and adherence to the highest ethical standards in public service.
<b>We Are Focused on Implementation</b>	As practitioners, our recommendations make practical sense and are designed for implementation.

### ***Services to Support Local Government Leaders***

Management Partners' services include everything required to support local government leaders. The range of our services includes:

- » ***Strategic and Business Planning*** – Setting the direction for the enterprise and preparing business plans required to achieve desired outcomes.
- » ***Organization Assessments*** – Analyzing the organization (including structure, staffing, business processes, policies and resources) to identify improvements to an operation's efficiency and effectiveness.
- » ***Financial Planning, Budgeting and Analysis*** – Managing the financial affairs of the enterprise, performing multi-year financial planning, and developing a well-structured, transparent budgeting process supported by thorough analysis.
- » ***Organization Development*** – Developing organizational capacity, a key to high-performance organizations, through executive coaching, customer service training, employee and customer surveys, and conflict management workshops.
- » ***Performance Management*** – Systematically tracking the performance of the enterprise, including performance measurement, process management, performance budgeting, employee performance evaluation, and strategic and process benchmarking.



- » **Process Improvement** – Critically examining specific business processes through which internal or external customers are served to identify opportunities for improvement using process mapping, performance improvement workshops, and other quality tools.
- » **Sharing and Consolidation of Services** – Improving the cost-effectiveness and quality of service delivery by partnering with other units of government through sharing or consolidation.
- » **Management Services** – Assisting government leaders by providing executive staff during transitional periods. Our approach combines continuing services along with analyzing organizational effectiveness to provide a solid foundation for a new permanent employee.
- » **Executive Recruitment** – Identifying top quality leaders who are a good fit for your organization and your community.

## Our Understanding of the Engagement

The Monterey County Water Resources Agency is at a crossroads. During its most recent strategic planning retreat held in November 2017, the Board determined that a comprehensive, multi-year strategic plan is needed for the Agency.

The Agency's budget is approximately \$35 million, which is insufficient to meet its program and project needs. Revenue options are being examined by staff and the Board. Several vacant positions exist and the organization's authorized strength has been reduced over the past few years due to budgetary constraints. A partial list of key Agency programs, facilities and projects is shown in the table below.

Key Agency Programs, Facilities and Projects	
<ul style="list-style-type: none"> <li>» Groundwater, fish and flow monitoring</li> <li>» Floodplain management</li> <li>» Groundwater extractions</li> <li>» Salinas River Lagoon management and enhancement</li> <li>» Salinas River stream maintenance</li> <li>» Seawater intrusion monitoring</li> <li>» Water conservation</li> <li>» Quagga and Zebra mussel prevention</li> </ul>	<ul style="list-style-type: none"> <li>» Nacimiento and San Antonio Reservoirs</li> <li>» Salinas Valley Water Project</li> <li>» Nacimiento hydroelectric plant</li> <li>» Salinas River diversion facility (SRDF)</li> <li>» Granite Ridge regional water supply</li> <li>» Castroville Seawater Intrusion Project (CSIP)</li> <li>» Salinas Valley Reclamation Project (CSRP)</li> <li>» Land use, construction and well permit application review</li> </ul>

Within the past two years, the Agency refined its vision and mission statements, as follow.

- » **Vision:** *To become a recognized and respected leader in the community we serve through demonstrated knowledge, integrity and the quality of our actions.*
- » **Mission:** *The Water Resources Agency manages, protects, stores and conserves water resources in Monterey County for beneficial and environmental use, while minimizing damage from flooding to create a safe and sustainable water supply for present and future generations.*



The Agency is now beginning the process of quantifying what it will need to carry out its mission and achieve its vision. Staff's resource analysis work over the past few years make clear that available funding will be inadequate to support current programs and projects, much less for any new or expanded scopes of work.

Through the comprehensive strategic planning process being initiated now, clearly establishing a baseline of information about current and projected program and project costs and staffing needs will be essential. Following that, the task of identifying financial strategies will be incorporated into the strategic plan.

Agency leaders desire recommendations for an optimal organizational structure and staffing plan, along with changes to policies and management systems that would increase its efficiency and effectiveness. Through the assessment, Agency leaders also wish to identify ways to streamline procedures and processes, technology improvements, staffing requirements, and staff development and succession planning needs, consistent with industry best-management practices.

The Agency intends that the first phase, resource and organizational assessment, be completed by August 2018, so a comprehensive strategic planning process can begin in the fall. Phase two, the comprehensive strategic plan and business plan, will be completed in 2019.

### ***Phase One Results – Resource and Organization Assessment***

The deliverables for phase one will include the following components:

1. Inventory of Agency programs and projects, with the following information for each program and project:
  - » Description, objective(s), success measures, timeline and key milestones;
  - » Cost estimate, funding sources, projected available funds and gap; and
  - » Current and projected staffing needs.
2. Definitions of terminology so Agency staff and the Board of Directors will have a consistent language for the strategic plan, starting with the phase one work.
3. Summary of results of confidential online employee survey.
4. Summary of gap analysis and input on strategic challenges facing the Agency, including those pertaining to the Groundwater Sustainability Agency and other challenges that will be identified through the phase one input process.
5. Results of benchmarking with peer agencies on staffing, organization structure, budgets and other data points.
6. Recommendations for changes to the organizational structure, staffing, employee development and succession planning, management systems and technology, policies and procedures, Board of Directors/staff effectiveness, performance evaluation process for the General Manager, and alternative service delivery options.
7. Description of methods to address deferred maintenance, including best practices for funding and staffing different levels of maintenance: preventive, predictive and a capital



asset management program (CAMP) for upgrades, repairs and replacements of all capital facilities, with annual reserve funds for sustaining the CAMP.

8. Recommendations for further analyses needed to inform the strategic plan and implementation business plan.

### ***Phase Two Results – Strategic Plan and Implementation Business Plan***

*Note: This is a draft list, to be refined upon completion of phase one and a detailed scoping of phase two.*

1. Summary of input from constituents regarding strategic challenges and expectations of the Agency.
2. Updated program and project inventory based on input from constituents about expectations of the scope of work for the Agency, Groundwater Sustainability Agency and other programs and projects to be identified through the phase two input process.
3. Strategic plan that contains a vision, mission, values, long-term goals and strategies for achieving the goals.
4. Implementation business plan that includes a financial plan, staffing plan, timelines, milestones, success measures, methods to report on progress, and schedule for updating the strategic plan.
5. Recommendation for communicating the strategic plan and implementation business plan.
6. Analysis of alternative service delivery options that may have been identified in phase one.
7. Other elements to be included once the scope of work for phase two is prepared.

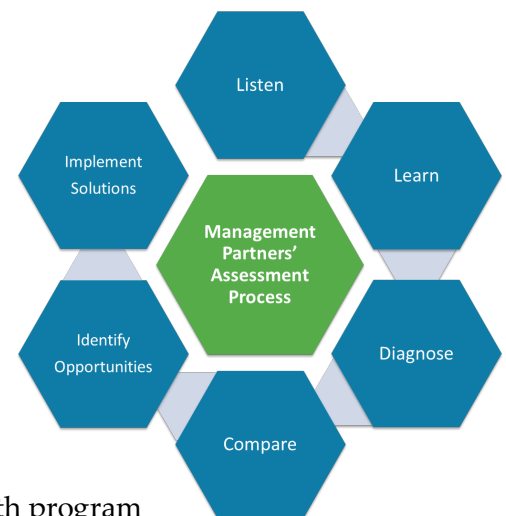
## **Proposed Work Plan**

Based on our experience with organization reviews and our understanding of the needs of the Monterey County Water Resources Agency, we have prepared the plan of work below. This framework is amenable to refinements, based on your input. Our assessment process involves the elements shown in this graphic.

### ***Activity 1 – Start Project and Conduct Kickoff Meeting***

We will begin this project by meeting with Agency staff and members of the Board's Planning Committee to discuss the details of the project approach and execution. The start-up meeting is the occasion to refine the plan of work to ensure matters of interest are included in the review and that the project schedule is reasonable and melds well with other staff commitments. This activity will form the basis of the partnership between Management Partners and the Agency.

It will also be important to introduce this initiative to Agency staff properly to ensure a good start. We suggest a meeting with program



managers to discuss the purpose of the study and the approach we will use as well as to hear their questions about the study.

### ***Activity 2 – Gather Information and Prepare Detailed Materials***

Next, we will gather information and prepare a variety of detailed materials in the following six tasks.

1. ***Obtain Agency information.*** We will request a variety of information that includes the following, as available:
  - » Agency budget;
  - » Staffing details (including current vacancies and five years of authorized positions);
  - » Organization chart(s);
  - » Written plans for technology improvements;
  - » Written policies and procedures, tracking and workflow documents;
  - » Written procedure for current performance evaluation process for General Manager; and,
  - » Other information that will be helpful in providing background context for the phase one resource and organizational assessment.
2. ***Conduct interviews.*** We will conduct approximately 12 interviews. These will be with you, the Board Chair and Planning Committee members, the deputy general managers and senior Agency staff. The interviews will be important in gaining an understanding of the operations, challenges, and capacity to meet service level expectations, and opportunities for improvement.
3. ***Refine program and project inventories with clear objectives and milestones.*** This task will build on the significant work done by staff in preparation for the November 2017 strategic planning retreat, which documented the Agency's programs and projects. Through that work, Agency staff members listed approximately 40 projects and programs.

Management Partners will allocate significant time to working closely with Agency staff in creating a program and project inventory, which will include the following components:

- » Document the programs and projects that are funded and those that should be carried out but are not funded.
- » Document the staffing needed for these funded and unfunded programs and projects.
- » Prepare program or project descriptions, measurable objective statements, milestones and success indicators.
- » Review and refine the budgetary projections, including shortfalls and potential funding sources.





Management Partners understands that the level of effort for the November 2017 document was significant and this next iteration will also be time-intensive, which is challenging in a lean staffing environment.

Our work plan calls for our consulting team members to meet individually with program managers as we prepare these inventories with Agency staff's expertise in their programs and projects. We will carry out the following steps:

- » *Prepare materials.* Create a workbook containing guidelines, terminology, forms/spreadsheets to be used in refining the inventories of Agency programs and projects prepared by staff for the November 2017 retreat.
  - » *Convene meeting.* Meet with senior staff and program managers to explain the desired outcome of this exercise, review the workbook and guidelines, and answer questions.
  - » *Meet individually with staff.* Assist Agency managers in developing descriptions, measurable objectives, success indicators and milestones for each program and project. Meet with each program manager to aid in completing this task. We are estimating 40 programs and projects will be defined through this inventory task. Each will require individual attention to develop objective statements, milestones, success indicators, staffing, and estimated cost.
  - » *Prepare drafts.* Prepare a draft of the program and project inventory for each program manager to review for accuracy. Revise based on input and present updated draft to senior staff to review.
  - » *Finalize inventory.* Finalize the program and project inventory based on senior management feedback.
4. *Administer gap analysis questionnaire.* We will design and administer a gap analysis questionnaire. This will be a structured method for managers to provide information, such as the following:
- » Strengths of the organization,
  - » Unmet needs,
  - » What the Agency should be doing that it cannot do now,
  - » Desired changes and improvements,
  - » Technology and training that would be beneficial to staff and operations, and
  - » Other observations that would position the Agency well for the future.

We will send the questionnaires to each program manager and then review the completed questionnaires with each program manager to ask clarifying questions and to provide assistance in completing them, as needed.

5. *Design and Administer Confidential Online Employee Survey.* We will design and administer a confidential online survey to all Agency staff. Management Partners finds that this is a meaningful way to engage all employees in offering their best ideas and perspectives that can be helpful in developing improvements and goals for the future.



Through the survey, employees will be invited to share feedback about Agency strengths, needs, challenges and suggestions for change and improvement. Key tasks will be carried out with the survey, as follows:

- » *Prepare draft survey.* Management Partners has conducted many employee surveys and we have questions we can use as a starting point, informed by our interviews and knowledge of the Agency.
  - » *Finalize survey based on feedback from senior staff.* We will seek input from Agency leaders about the survey to ensure that the questions cover the topics of interest. We will then finalize the survey once we incorporate any changes needed.
  - » *Send survey link to the Agency to send to all employees.* We will draft an email to be modified as needed by the General Manager to send to employees along with the link to the survey, encouraging all employees to participate. Survey responses will be sent directly to Management Partners.
  - » *Analyze responses.* Management Partners will analyze the survey responses and incorporate the information learned into our overall analyses as described below in Activity 3.
  - » *Create summary.* We will summarize the results and review them with the General Manager and/or designee.
6. **Conduct Benchmarking.** We will conduct benchmarking to compare the Agency's organization, budgets, programs and projects, and staffing with peer agencies. We will collaborate with you to determine which agencies are most comparable and to determine the data points to collect. This effort would involve collecting the following information from five or six relevant peer agencies.
- » Mission and key responsibilities,
  - » Budgets,
  - » Organizational structure, and
  - » Number of employees.

We will prepare and disseminate peer surveys and review publicly available data and survey responses. We will ask the Agency to reach out to colleagues in the peer organizations to ask for assistance completing the surveys. That is the most reliable way of ensuring the data are accurate. We will summarize the results of our benchmarking and include it in our analysis in Activity 3.

### **Activity 3 – Conduct Analysis**

Next, we will conduct our analysis, which will cover the following ten areas:

1. **Organizational structure.** We will analyze reporting relationships, work flow, spans of control, and identify options for improving efficiency and effectiveness. We will prepare optional organization charts for discussion with the Agency.





2. ***Staffing, Employee Development and Succession Planning.*** We will analyze staffing needs and identify what is needed to carry out the Agency's mission. This will involve assessing succession planning, staff development and the methods in place to sustain a well-trained and engaged workforce well into the future.
3. ***Policies, planning and management systems.*** We will analyze key policies, planning mechanisms, management systems, workflow and tracking systems that guide the operations of the Agency. We will identify opportunities to optimize efficient and effective implementation of the Agency's mission.
4. ***Administrative services and use of technology.*** We will assess the Agency's administrative strengths and use of technology to identify functions and responsibilities that require additional support and planning.
5. ***Alternative service delivery opportunities.*** We will ascertain whether there are alternative methods of delivering some functions that would increase the efficient operations of the Agency. As alternatives are identified, we will assess what will be needed to fully develop the feasibility of such methods, which would occur at a later time, as the Agency determines.
6. ***Board of Directors/staff effectiveness.*** We will identify opportunities to enhance the effectiveness of the Board/staff relationship so that roles and expectations are clear.
7. ***General Manager performance evaluation process.*** We will review the Agency's existing performance evaluation process for the General Manager and provide recommendations for structuring a process for optimum value to both the Board of Directors and General Manager.
8. ***Deferred maintenance.*** We will identify methods of the Agency providing for the proper maintenance of its facilities. We will describe methods the Agency can use to establish, fund and staff preventive and predictive maintenance for current facilities; and creating a Capital Assets Management Program (CAMP) for upgrades, repairs and replacement of all capital facilities, which would include an annual reserve funds for sustaining the CAMP.
9. ***Compare with other agencies.*** We will analyze the data received through benchmarking and compare the Monterey County Water Resources Agency with its peer agencies on staffing, budgets, organization structure and other indicators for which data has been gathered.
10. ***Other needs.*** We will analyze other needs that may have surfaced as a result of the gap analysis, interviews, and employee survey.



We will prepare an outline of observations and preliminary recommendations for discussion with you, senior staff and Planning Committee members. Our outline will include the results of our analysis of the areas listed above, and any others that we have identified during the course of our assessment.

#### **Activity 4 – Report Results**

Next, we will prepare a draft report that includes our analysis and recommendations. It will contain the following elements (to be refined as we conduct our assessment).

- » Background information;
- » Inventory of Agency programs and projects;
- » Definitions of terminology;
- » Summary of results of confidential online employee survey;
- » Summary of gap analysis and input on strategic challenges facing the Agency;
- » Results of benchmarking with peer agencies;
- » Recommendations for changes to the organizational structure, staffing, employee development and succession, management systems and technology, policies and procedures, Board of Directors/staff effectiveness, performance evaluation process for the General Manager, and alternative service delivery options;
- » Description of methods of addressing deferred maintenance, including *preventive*, *predictive* and a *capital assets management program (CAMP)*;
- » Recommendations for further analyses needed to inform the strategic plan and implementation business plan; and
- » Description of recommended phase two strategic planning and development of an implementation business plan.

We will present the draft for review and comment to you, other senior staff you designate and the Planning Committee. At the conclusion of the review period we will consider all changes and suggested revisions and prepare the final report. Management Partners will present the report to the full Board of Directors, if desired.

Reports prepared by Management Partners are rich in detail, with recommendations supported by quality analysis. We take pains to ensure our analysis is clearly written with a logical flow, with recommendations immediately following the analysis that gives rise to them. If there are implementation considerations or suggestions pertinent to a specific recommendation, those comments immediately follow the recommendation to which they are related.

#### **Activity 5 – Support Implementation**

Management Partners has a strong bias for action. Our reports and resulting recommendations become tools for organization improvement, strategic planning, setting priorities and developing work plans.

After completing the project report, we will prepare a draft Implementation Action Plan for phase one, incorporating each recommendation in the project report. The draft action plan will



set forth the steps required for implementation, assign responsibility for action, and an assigned priority level (immediate, near or long term) for initiating each recommendation.

The action plan will be prepared as a draft and it becomes final once you and your staff integrate the action steps into the work plan and develop dates for planned completion. The action plan offers an important management tool to implement the work in the project report.

## Our Experience and References

In addition to the past work we have done for the Monterey County Water Resources Agency, the following list shows jurisdictions we have assisted in the recent past with organization reviews of municipal public works departments. We have conducted reviews of entire governments and individual departments, and reviews of public works departments are one of our most frequent assignments. In addition to the references below, our website, [managementpartners.com](http://managementpartners.com), has information about our past clients, which includes hundreds of jurisdictions in 42 states, and you are welcome to contact any of them about our performance.

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|-----------------------------|----------------------------|
| » Benicia, California       | » Pittsburg, California    |
| » Boulder, Colorado         | » Raleigh, North Carolina  |
| » Burlingame, California    | » Redwood City, California |
| » Daly City, California     | » San Carlos, California   |
| » Davis, California         | » San Leandro, California  |
| » Dublin, California        | » Santa Cruz, California   |
| » Glendora, California      | » Sarasota County, Florida |
| » Harrisburg, Pennsylvania  | » Shawnee, Kansas          |
| » Hillsborough, California  | » Stephenville, Texas      |
| » Hopkinsville, Kentucky    | » Surprise, Arizona        |
| » Irvine, California        | » Tamarac, Florida         |
| » Lantana, Florida          | » Tolland, Connecticut     |
| » Long Beach, California    | » Washoe County, Nevada    |
| » North Las Vegas, Nevada   | » Woodland, California     |
| » Orange County, California | » Yuba City, California    |
| » Pasadena, California      |                            |

## References

### Zone 7 Water Agency, California – Economic and Operations Analysis

Management Partners was retained by the Zone 7 Water Agency to complete a comprehensive economic and operations analysis to determine how Zone 7's support services could be provided in the most efficient and effective manner possible. The study considered the impact on rate payers and addressed the agency's concern about the estimated time it takes to conduct routine business operations. Management Partners analyzed the support services of human resources, finance, benefit administration, risk management, information technology, and related services. The focus was on optimizing Zone 7 operations for ratepayers and



stakeholders, and was not an evaluation of the effectiveness of the County's support services. Management Partners' report included 24 recommendations that addressed how the support services could be transitioned from the County to Zone 7 to reduce costs and streamline services. The estimated cost savings to the Zone 7 with the full implementation of all recommendations was approximately \$355,000 per year.

Client Contact: Ms. Jill Duerig, General Manager  
Zone 7 Water Agency  
100 North Canyons Parkway  
Livermore, CA 94551  
(925) 454-5016

### **Santa Clara Valley Water District, California – Organization Review**

Management Partners assisted the Water District with an organization review that examined the use of unclassified employees throughout the organization. The project included analyzing the number, responsibilities and span of control of each unclassified employee. In addition, we conducted a benchmarking study to examine salaries, benefits and utilization of unclassified employees in similar organizations to determine if the use and compensation was in line with like operations.

Following the District's review of our report, the District underwent a reorganization which resulted in eliminating or reassigning certain unclassified staff to other positions. Following that, the Water District retained Management Partners to provide an update to the earlier report, which included updating benchmarking data as well as benchmarking private sector water companies. In addition, we provided recommendations to modify the classification and compensation structure for unclassified staff, to allow the District to meet its recruiting and retention goals in a market-oriented and flexible manner, adapting to changing local labor conditions. Recommendations included developing a compaction policy, reviewing and modifying the Y-rating policy, and reclassifying some position classifications.

Client Contact: Mr. Jesus Nava, Assistant City Manager of Oxnard  
(former Chief Administrative Officer of Santa Clara Valley Water District)  
300 West Third Street, 4<sup>th</sup> Floor  
Oxnard, CA 93030  
(805) 385-7430                      [jesus.nava@oxnard.org](mailto:jesus.nava@oxnard.org)

### **Tri-Valley Utilities, California – Coordination and Integration Study of Six Agencies**

Management Partners was engaged to conduct a coordination and integration study of six public agencies. The Tri-Valley utilities group is comprised of the Zone 7 Water Agency, the Dublin San Ramon Services District; and the cities of Livermore, Pleasanton, San Ramon and Dublin. The six agencies initiated a study to identify potential opportunities for cooperation and integration of functions between the agencies. The study was initiated due to a Local Agency Formation Commission discussion. The result was a report that outlined opportunities for



operational and support integration, possibilities for major integration at the institutional level, seven governance models, and the many factors that should be considered when pursuing service integration. Four case studies were developed from other agencies that had gone through consolidations. These case studies provided valuable lessons learned.

**Client Contact:** Mr. Daniel McIntyre, PE, General Manager  
Dublin San Ramon Services District  
7051 Dublin Blvd  
Dublin, CA 94568  
(925) 875-2200      mcintyre@dsrsd.com

### **San Bernardino, California – High-Level Assessment of Public Works Department**

As part of the City of San Bernardino's emergence from bankruptcy, Management Partners conducted a high-level assessment of the functional organization structure, staffing levels, and core services provided by the Public Works Department. As a result of a lack of investment in infrastructure maintenance, the City's infrastructure and asset maintenance had declined significantly over the last 15 to 20 years. In addition, there had been little investment in management and information systems. Management Partners provided a framework to stabilize the department so it could begin to provide a disciplined path to address a substantial set of citywide infrastructure maintenance and asset deficiencies.

**Client Contact:** Ms. Andrea Miller, City Manager  
290 North "D" Street,  
San Bernardino, CA 92401  
(909) 384-5122      miller\_an@sbcity.org

### **Benicia, California – Public Works and Parks Maintenance Review**

Management Partners conducted an organization review of the maintenance and engineering functions for the City of Benicia. The engineering functions include planning, design and construction of infrastructure, along with traffic engineering and associated responsibilities. The maintenance functions include streets, parks and buildings. Management Partners analyzed the organizational structure, staffing configuration, and roles and responsibilities. We conducted interviews and focus groups, reviewed documents, reports and operating procedures, and conducted peer benchmarking. We also provided performance measurement training to staff and developed outcome-based performance measures for each program. In addition to performance measures, we provided recommendations for an organizational structure and staffing model to support the City's business, programs, services, and operational objectives for engineering and maintenance. Specific recommendations included revisions to policies, employee training and succession planning, consolidating several functions and other improvements to increase efficiency and effectiveness.



Client Contact: Mr. Brad Kilger, City Manager  
City of Martinez (former Benicia City Manager)  
525 Henrietta Street  
Martinez, CA 94553  
(925) 372-3505      bkilger@cityofmartinez.org

**Irvine, California – Capital Improvement Program and Project Delivery Study**

Management Partners was retained by the City of Irvine to analyze the business processes and organizational structure of the Project Management Division of the Public Works Department. The division is responsible for engineering design, construction management and inspection of infrastructure and facility projects. The objective of this study was to identify improvements to the current system. Our analysis and recommendations included creating a new organizational unit, making several staffing changes and changes to internal processes, technology and business systems.

Client Contact: Ms. Jacki Scott, PE, TE, City Traffic Engineer  
City of Orange  
(formerly Manager of Engineering in Irvine)  
300 E. Chapman Avenue  
Orange, CA 92866  
(714) 744-5534      pwinfo@cityoforange.org

**San Leandro, California – Engineering and Transportation Department Organization Review**

Management Partners was retained by the City of San Leandro to analyze the organizational structure, staffing, and operations of the Engineering and Transportation Department. This department is responsible for a broad range of services, including capital improvement project development, land development, public right of way encroachment inspection and management, traffic and transportation (operations, design and planning), construction inspection, real estate and administrative functions. Our approach included interviews, peer benchmarking, an employee survey, a review of the City's Capital Improvement Plan, and best practice research. These contributed to recommendations that included a new division, revisions to the existing reporting structure, several staffing changes, and improvements to internal processes, technology, and communications.

Client Contact: Mr. Keith Cooke, Engineering and Transportation Department Director  
835 E. 14th Street  
San Leandro, CA 94577  
(510) 577-3428      kcooke@sanleandro.org



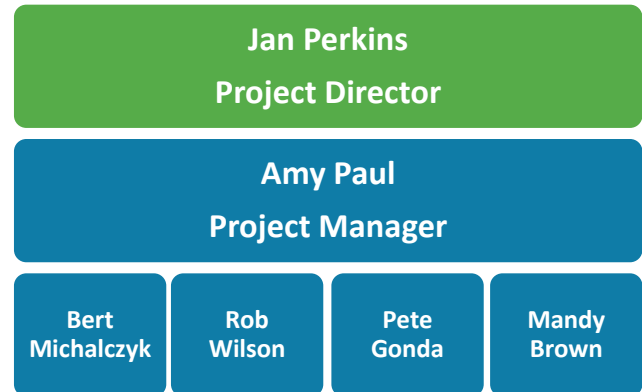


## Our Project Team

Management Partners has a strong project team that is well qualified to complete this work for the Monterey County Water Resources Agency.

This project will be a top priority for Management Partners and our team members will be available in whatever capacity and with whatever availability will contribute to the success of the project. The individuals on the team have experience with municipal water utilities, many consulting assignments in the public works area, strategic planning and performance measurement. Jan Perkins will serve as project director and will oversee the substantive work of

the project. Amy Paul will serve as project manager and be responsible for execution of the project. They will be supported by Bert Michalczyk, Rob Wilson, Pete Gonda and Mandy Brown. Brief qualifications of each team member are provided below. Other Management Partners team members will be available as needed.



### Jan Perkins, Senior Partner

Jan Perkins has 30 years of management experience in local government. Before joining Management Partners in 2005 she served in several California and Michigan jurisdictions, including as city manager in Fremont and Morgan Hill, California. She also served the cities of Santa Ana, California; Grand Rapids, Michigan; and Adrian, Michigan. She provides assistance to government leaders in organizational analysis, leadership development, facilitation, strategic planning, teambuilding, executive performance evaluation, and policy board/staff effectiveness. Jan is a frequent speaker at conferences and has authored a number of articles.

### Amy Cohen Paul, Corporate Vice President

Amy has more than 30 years of experience in local government management, performance measurement and strategic planning. She assists public agencies in conducting organization reviews, implementing operational improvements, identifying alternative service delivery methods, designing and implementing performance management systems, and developing strategic and business plans. She also is a skilled facilitator and trainer. Amy was part of the original management team of the International City/County Management Association's Center for Performance Measurement and she helped produce ICMA's training materials on outcome measurement. She has been the project manager for several public works projects, including the California cities of Pasadena, Benicia, Burlingame, San Leandro, and Woodland, and Surprise, Arizona.

### Bert Michalczyk, Special Advisor

Bert is a civil engineer who spent more than 25 years with the Dublin San Ramon Services District (DSRSD), including 15 years as the District's general manager. In that role, he had overall responsibility for all aspects of staffing, budgeting, operations and engineering. During



this period DSRSD steadily grew to its current size of about 20,000 water accounts, 10.5 mgd of wastewater treatment flows and almost 2,500 acre feet of recycled water. The DSRSD's credit rating steadily improved during his tenure to AA+ and has over \$145 million of financial reserves under management earmarked for future capital projects to support a \$75 million combined capital and operating budget. Bert has practiced civil engineering in the State of California since 1979. He holds a bachelor of science in civil engineering degree from the University of Toledo and a master of science in civil engineering degree from Purdue University. He is a Registered Civil Engineer (C 33332) in the State of California.

### **Rob Wilson, P.E., Special Advisor**

Rob has had a successful career in local government over a 32-year period. In addition to his experiences as director of the Public Works Department in Pleasanton, and city engineer in Fremont, his work experience includes leading both the Planning and Building Divisions in Fremont. Early in his career he also worked for the City of Millbrae. In addition to his highly developed problem solving and leadership skills, Rob has been trained as a facilitator, and developed an expertise in the community engagement process. He has made presentations at League of California conferences on community engagement and engineering technical matters and co-wrote an article for Western City Magazine on the use of technology to save time and money by Pleasanton's Public Works Department. He has also led and implemented strategic planning processes in his departments with measurable results. Rob is a member of the American Public Works Association and the American Water Works Association.

### **Pete Gonda, Senior Management Advisor**

Pete has more than 20 years of experience in municipal government, with an emphasis on analytics, budgeting, procurement management, contracts and performance measurement. He served as purchasing officer for the City of Sunnyvale, California for nine years, where he managed an award-winning centralized purchasing division with \$42 million in annual operational spending. In this role, Pete bid and awarded \$80 million in capital projects under a federally funded local economic stimulus program at a 30% savings, and implemented continuous process improvements for a variety of services. He also served as a senior management analyst in Sunnyvale's Finance Department, where his responsibilities included intergovernmental relations, policy analysis and revenue/expense management, including cost of service studies and related activities. Pete has also worked in Sunnyvale's Department of Public Safety, the City of San Jose's Office of Economic Development, and the City of Saratoga's City Manager's Office.

### **Mandy Brown, Management Analyst**

Mandy is responsible for conducting financial and operational analyses to support many types of client projects including organization reviews, process improvement, financial planning, and budgeting studies. She has a background in urban planning and statistics with significant community engagement and project management experience. Her analytic training includes inferential statistics, linear and logistic regression, and survey research and design. She is



experienced in collecting data and using analysis and modeling tools for forecasting, policy analysis, and the design of projects and plans.

## Project Hours and Fee

Management Partners anticipates devoting 552 hours of our staff time to complete the plan of work described above in Activities 1 through 5. The total cost of those activities is \$94,900 which includes all fees and expenses. The ultimate test of a quality project is that the client is pleased with the results, and we are committed to achieving that goal.

Activity	Hours	Fee
<b>1 – Start Project and Conduct Kickoff Meeting</b>	29	\$4,900
<b>2 – Gather Information and Prepare Detailed Materials</b>	240	\$39,900
<b>3 – Conduct Analysis</b>	167	\$29,700
<b>4 – Report Results</b>	99	\$18,400
<b>5 – Support Implementation</b>	17	\$2,000
<b>TOTALS</b>	<b>552</b>	<b>\$94,900</b>

## Timeline

Our estimated timeline for this phase one engagement is shown in the schedule below with week one being March 12 and week 28 being September 30. With this schedule, we plan to present our report to the Planning Committee and Agency staff in August 2018. We will begin mobilizing the project in early March, with a kickoff meeting in late March or early April, depending on availability of Agency staff. If the Agency desires to pursue phase two, that work could begin in September 2018.

Activity	Weeks 1 – 2	Weeks 3 – 4	Weeks 5 – 8	Weeks 9 – 12	Weeks 13 – 14	Weeks 15 – 16	Weeks 17 – 18	Weeks 19 – 20	Weeks 21 – 22	Weeks 23 – 24	Weeks 25 – 28
1 – Start Project/ Conduct Kickoff Meeting											
2 – Gather Information and Prepare Materials											
3 – Conduct Analysis											
4 – Report Results											
5 – Support Implementation											



## Conclusion

We would be pleased to assist the Monterey County Water Resources Agency with this important project. Please let either Jan Perkins at 949-202-8870 or me know if we can provide any additional information.

Sincerely,



Gerald E. Newfarmer  
President and CEO

Accepted for the Monterey County Water Resources Agency by:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

