

Staffing and Support Services Transition Project Management Plan

2023

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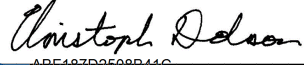
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1. Staffing and Support Services Transition Project Management Plan Approval

Category (check applicable):	<input type="checkbox"/> Policy <input type="checkbox"/> Process/Procedure <input type="checkbox"/> Program <input checked="" type="checkbox"/> Guidance		
Purpose:	The purpose of this Project Management Plan for the Staffing Services project is to establish and communicate the project schedule, scope, resources, and stakeholders for successful execution of the project.		
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Updates:	<i>Where this is an updated document, briefly describe the changes made in this version relative to the version immediately prior.</i>		

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2. Introduction

2.1 Purpose

The purpose of this Project Management Plan is to outline the project schedule, scope, resources, stakeholders, and decision-making process for successful execution of the project.

2.2 Project Description

The Districts sit at unprecedented crossroads, implementing a unique opportunity to better manage their labor, finances, and governance. By employing their own workforce, investing their own cash reserves, and implementing a legal merger, staff expects the combined District to emerge as a single, nimble, and efficient organization, able to provide even better value to its customers. The combined initiatives, together referred to as “One District,” are expected to result in many benefits.

The County of Sacramento currently provides labor and many services for the Districts. The County has a different scope of services and strategic direction, a separate financial situation, and its own unique set of challenges, all separate from the Districts.

This situation, unique to any other sanitation district in California, results in additional costs, a lack of control over quality of service, and has a profound impact on the Districts’ ability to cultivate an engaged workforce. The Districts have little control over labor negotiations, classification, compensation, and recruitment. Benchmarking indicates comparable sanitation districts with their own human resources functions can complete a host of HR transactions ten times faster than the County can provide the same service for the Districts.

3. The Project

3.1 Scope

The Staffing and Support Services Transition project scope is to bring staffing and certain County-provided services in-house. We plan to review all of the County-provided services and evaluate if they need to be transitioned:

- Human resources (labor relations, workers compensation, employee relations, salary study, benefits, administration, leaves, retirement, deferred compensation...)
- Fleet
- Risk management
- Real estate

- Legal counsel
- Environmental review and planning
- Construction management and inspection (CMID)
- DTech
- Consolidated Utilities Billing Services (CUBS)
- Clerk of the Board services
- Other- Any additional services that do not fall into a particular County Department (travel)

3.2 Objectives

The objective of the Staffing and Support Transition Services Project is to transition staffing and some services from County to the District as smoothly as possible. Some of the more specific objectives are as follows:

- Ensure a thorough review of each service so that all services are accounted for and analyzed
- Make a decision on service provider that is in the best interest of the District, but is also beneficial (or least not harmful) to the County
- Ensure a smooth transition for employees and the District, minimizing any disruptions in its business operations
- Maintain equal or better benefits for staff
- Meet established deadlines noted in the Project Schedule

3.3 Benefits

Regional San and SacSewer recognize the many benefits of employing its own staff. Bringing services in house will accomplish the following:

- Eliminate large indirect costs resulting in significant cost savings
- Enable the District to more clearly identify organizational culture, priorities, and mission independent from the County
- Allow specialized staff to be recruited in a more efficient manner to perform essential duties specific to the wastewater industry
- Enable the Districts to manage its full operations and future based upon policy decisions made by its Board
- Be able to attract and retain more qualified staff to perform essential duties specific to the wastewater industry
- Implement employment procedures that are reflective of business best practices and establishing a strong foundation to foster a more engaged and efficient workforce
- Eliminate confusion of identity among District staff that have to identify themselves as both District and county employees.

- Incorporate strategic HR practices managing HR in a way that supports our long-term business goals and outcomes. HR is not just focusing on the day-to-day but collecting and supplying data to our executive leadership to help formulate the appropriate actions which will best support our overall business objectives and goals

3.4 Project Impact

The Staffing and Support Services Transition Project will not affect sewer service to customers in the SacSewer and Regional San service areas. With the Staffing Services Project, the District will have the operational control and flexibility over its own workforce. The Staffing and Support Services Transition Project will impact the following stakeholders:

Stakeholder	Impacts
SacSewer and Regional San staff	Staff will have a new employer, possibly new classifications, compensation, labor representation
Contributing Agencies	No impacts expected
Regulatory Agencies	Potential changes to staff interacting with regulators.
Customers of SacSewer and Regional San	No impacts expected

4. Project Management

4.1 Project Resources

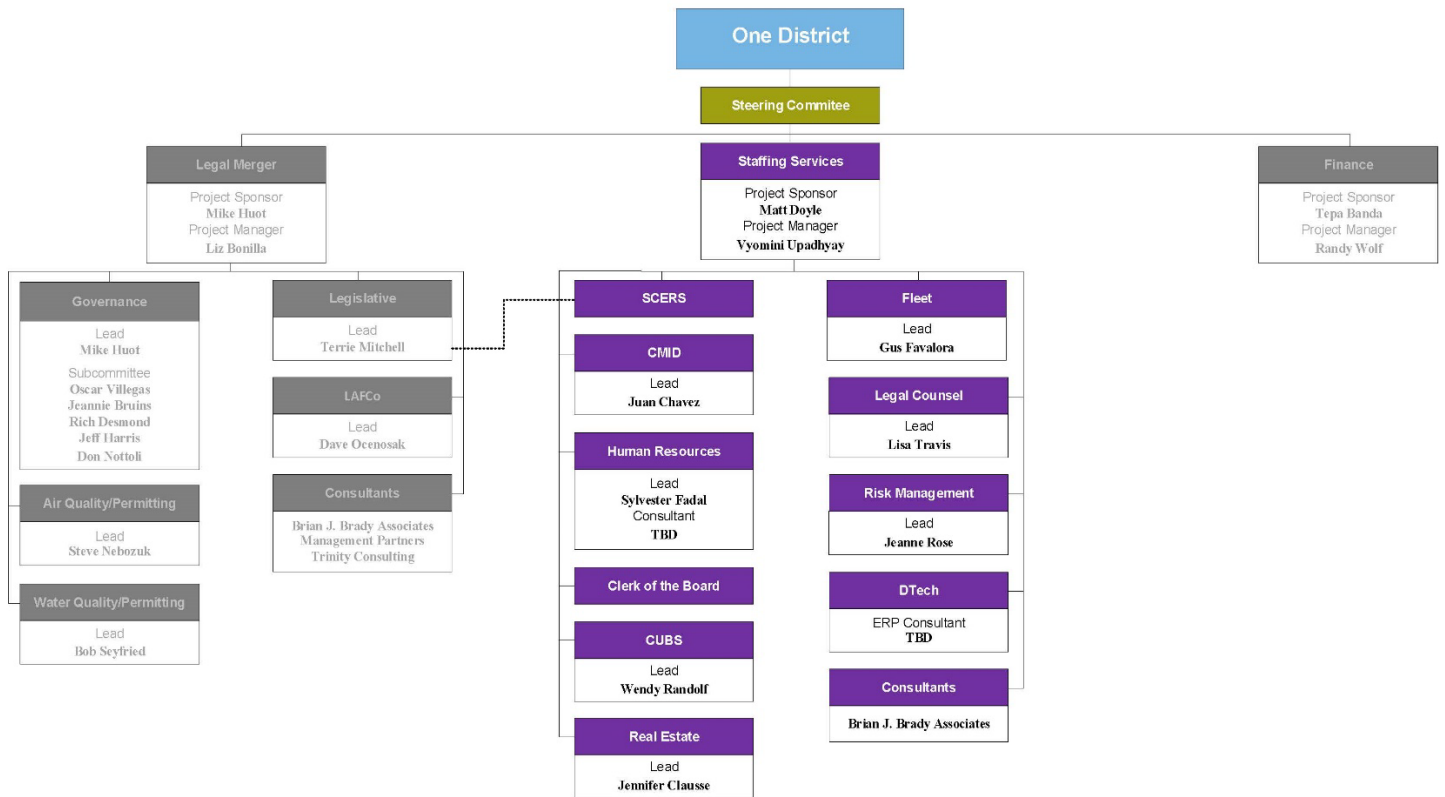
The following resources are assigned to the Staffing and Support Services Transition Project:

Role	Name and Title
Executive Project Sponsor	Matt Doyle, Director of Internal Services Department
Project Manager	Vyomini Upadhyay, Associate Civil Engineer
Project Staff	David Stoffel, Organizational Development Dave Ocenosak, Principal Engineer Candice Mabra, Human Resources Manager
Subject Matter Experts	Gus Favalora, Fleet Manager Juan Chavez, Construction Management and Inspection Division Lisa Travis, Legal Counsel Sylvester Fadal, Human Resources Jeanne Rose, Risk Management Jennifer Clause, Real Estate Wendy Randolph, CUBS Matt Connolly, Employee Labor Relations Sunny Kenner, Travel Services Alice Krueger, Benefits
Consultants	Brian J. Brady and Associates

	LCW (Labor Relations) HR Consultant (Not yet identified) Soft Resources (ERP) Other consultants specific to the services being transitioned
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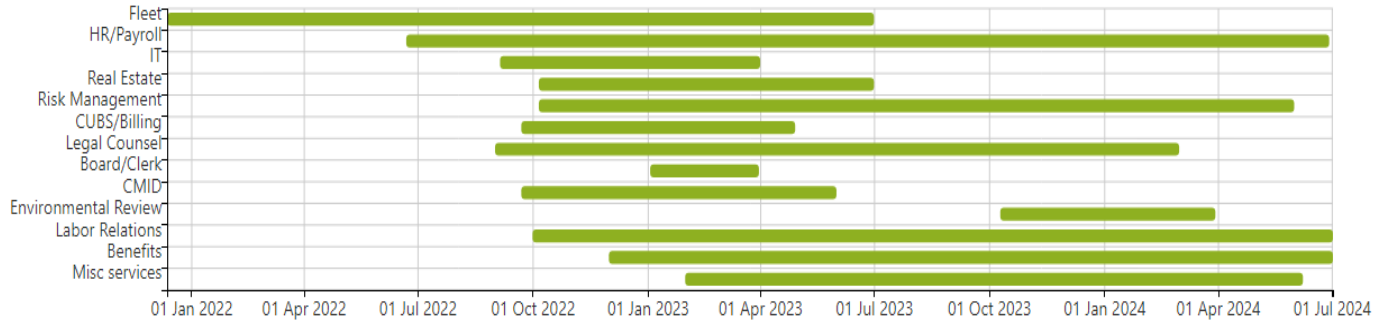
This effort is of utmost priority and resources have been assigned for each of the project described up above.

4.2 Project Organizational Chart



4.3 Project Milestones and Schedule

The high level project schedule for each of the services is included below.



4.4 Roles and Responsibilities

The following chart can be used to identify each role and its respective responsibilities to the project.

Project Team Role	Responsibilities
Executive Sponsor	<p>The individual who provides executive-level sponsorship and support for the project. Primary responsibilities are as follows:</p> <ul style="list-style-type: none"> • Champions the project across the organization • Assist the Project Sponsor in determining competing project priority across the organization • Communicate with the executive management, internal, and external stakeholders about the plans for the project • Understand the scope and its relationship to the organizations’ strategic plans • Oversees the establishment of governance processes and structures • Demonstrates commitment to the project
Project Sponsor	<p>The individual who has overall sponsorship and ownership for delivery of the project. Primary responsibilities are as follows:</p> <ul style="list-style-type: none"> • Champions the project across the organization • Determines competing project priority across the department • Provides project vision, objectives, goals, and scope • Provides guidance on decisions • Provides direct support to the Project Manager to ensure his/her success • Remove impediments/roadblocks from team to ensure project objectives can be met within the established timeframe

Project Team Role	Responsibilities
Departmental (or Section) Sponsor	<p>Primary responsibilities are:</p> <ul style="list-style-type: none"> • Assist in identifying other key stakeholders within the organization who may have future responsibilities for implementing any changes identified for the merger effort • Provide input and support to the Project Sponsor and Project Manager • Review and provide feedback on documents, provides information, resources, and support to complete tasks
Project Manager	<p>The individual responsible for the administration and coordination of the project team and schedule. Primary responsibilities are:</p> <ul style="list-style-type: none"> • Manages day-to-day project activities • Works with sponsors, stakeholders, and subject matter experts on various items to move project forward • Provides status updates to the Departmental (or Section) Sponsor, Project Sponsor, and other stakeholders • Leads weekly team meetings and documents key decisions
Subject Matter Experts	<p>This individual provides expertise on a specific subject area. Their primary responsibilities are as follows:</p> <ul style="list-style-type: none"> • Provide expertise in the functional and technical areas they are representing • Review team products and be the team's contact for questions related to their area of expertise • Seek out information from other staff in their functional area when needed

4.5 Project Meetings

Project meetings are ongoing since January 2022. Meetings with County Executives are quarterly to track the progress of transition of services. Meetings with subject matter experts for each of the services are scheduled out no longer than monthly and are dependent on the time to gather the appropriate data and evaluate to ensure the transition of the services is smooth and timely. Meetings between project manager and executive sponsor are bi-weekly to address immediate actions needed for transition of services. Meetings with consultants are scheduled on an as needed basis.

5. Decision Making and Approval Process

The entire Staffing and Support Services Transition Project is broken down into different services provided by the County. All staff currently assigned to the Sanitation Districts Agency,

plus Human Resources, would become District employees. A draft organizational chart is developed for the transitioned services and staff.

Staff, along with County subject matter experts, are evaluating each of the services. Subject matter experts are reviewing the scope of services, the level of effort and cost for those services, and ease of transition from County. Services may be performed by in-house staff, outside contractors, or by County through an agreement. Following the evaluation of the services, subject matter experts will make a recommendation, which will be carried to the Executive Team by the Executive Sponsor and or the Project Manager. Once the Executive Team makes a decision on the service provider, further assessments will be made on securing resources such as hiring staff, requesting consultant services, or developing an agreement with County. If hiring staff in-house, recommendations will be made on appropriate staffing level, classification, and positions in organizational chart.

5.1 Work Breakdown Structure with Deliverables

The work breakdown structure for the various services being transitioned is shown below. Since the services are still work in progress, the final deliverable is unknown for some of the tasks at this time. The table below will be updated frequently to reflect the updates in the transition process.

Services and Tasks	Lead	Deliverable	Current Status
<i>1. Human Resources (Admin)</i>	Matt Doyle		
1.1 Identify scope of services			Complete
1.2 Review/Select Service Provider			RFP Closes 1/18/23
1.3 Secure Resources			
A. Procure Consultants			In progress
B. Hire Human Resources Manager			Complete
<i>1. Human Resources (Benefits)</i>	Candice Mabra		In progress
1.1 Identify scope of services			
a. Compare and assess benefits options			In progress
1.2 Review/Select Service Provider			
a. Meet with County Benefits team to discuss and review options			In progress
b. Meet with and assess other benefits provider options			In progress
1.3 Secure Resources			
a. Secure benefits providers and associated contracts			
b. Develop and distribute communications campaign			

a. Develop policies, admin procedures, and service expectations			
b. Hire and train staff			
c. Obtain board approval of associated policies			
1.4 Transition Services			
<i>1. Human Resources (Employee Relations, EEO, & Disability Compliance)</i>	Candice Mabra		In progress
1.1 Identify scope of services			
a. Develop procedures, disciplinary and investigation resources, and service expectations			
b. Develop employee resources and resources for internet and intranet	Jeff Vail Candice Mabra		
c. Develop and implement employee relations tracking/documentation within ERP system			
1.2 Secure Resources			
a. Hire and train staff			
1.3 Transition Services		Hire Senior Personnel Analyst	
<i>1. Human Resources (Labor Relations)</i>	Matt Doyle		
1.1 Identify scope of services			In progress
1.2 Review/Select Service Provider			In progress
a. Procure Consultant			In progress
1.3 Secure Resources			
a. Develop Employee Employer Relations (EER) Resolution			
b. Review policies and assess MOUs to propose immediate policies for development or revision			
c. Execute the Competitive Election Process			
d. Contract negotiations			
e. Identify staffing needs			
f. Hire and train staff			
1.4 Transition Services			

<i>1. Human Resources (Medical Leaves & ADA)</i>	Candice Mabra		Pending future SRA position approvals
1.1 Identify scope of services and staffing needs			
1.2 Secure Resources			
a. Hire and train staff			
b. Develop and implement related activities within ERP system			
c. Develop policies, procedures, and service expectations			
d. Develop and implement employee and supervisory resources and related trainings			
1.4 Transition Services			
<i>1. Human Resources (Recruitment, Exams, and Hiring)</i>	Candice Mabra		Pending March SRA position approvals
1.1 Identify scope of services and staffing needs			
a. Explore/develop 'transfer' policy & process - to and/or from County			
1.2 Transition Services			
a. Pre-separation - agency specific classes only			
b. Collaborate with DPS Employment Services to establish process for use of lists post separation			
c. Post transition of staff to Sac Sewer employment			On hold per positions are subject to County CRS rules
d. Develop and implement ERP hiring process/data feed into ERP from applicant tracking system			
1.2 Review & Select HRIS applicant tracking system Provider			
a. Develop/configure system			
b. Import class and comp data and user information			
c. Develop user trainings			
d. Implementation and user training			
e. Develop HR/Admin staff procedures and service expectations			

1.3 Interview & Selection Process Development	Candice Mabra		
a. Develop and implement uniform practices and resources	Candice Mabra		
b. Implement trainings – for all leadership positions and staff who participate in panel interviews	Jennifer Weitz David Stoffel		
c. Develop and implement HR/Admin processes and services to support agency-wide support and compliance			
1.4 Secure Resources			
a. Procure applicant tracking vendor/HRIS application system			
b. Hire and train staff			
c. Develop policies, procedures, and service expectations			
<i>1. Human Resources (Class & Pay)</i>	Senior Personnel Analyst (TBD)		Pending future SRA position approvals
1.1 Identify scope of services and staffing needs			
a. Compile listing of urgent class and pay studies and the associated deadlines			
1.2 Secure Resources			
a. Develop procedures and service expectations			
b. Hire and train staff			
1.4 Transition Services			
a. Conduct class studies for urgent/priority classes			
b. Conduct compensation studies for urgent/priority classes			
c. Transition ‘in-process’ class and pay studies			
<i>1. Human Resources (Pre-Employment Activities & Onboarding)</i>			Pending future SRA position approvals
1.1 Identify scope of services and staffing needs	Candice Mabra		
a. Develop associated policies and service expectations	Candice Mabra		
b. Collaborate with Org. Development & Performance	David Stoffel Jennifer Weitz		

Team to create and/or incorporate onboarding practices			
1.2 Review/Select Service Providers	Candice Mabra		
a. Livescan/background provider(s)			
b. Medical and drug screening provider(s)			
1.3 Secure Resources			
a. Execute contracts with providers			
b. Collaborate with Admin to consolidate related services			
c. Hire and train staff			
1.4 Transition Services			
<i>1. Human Resources (Workers' Compensation)</i>			
1.1 Identify scope of services			
1.2. Review/Select Service Provider(s)			
1.3 Secure Resources			
<i>1. Human Resources (Payroll)</i>			
1.1 Identify scope of services			
1.2 Review/Select Service Provider(s)			In Progress
1.3 Secure Resources			
<i>2. Fleet</i>	Gus Favalora		
2.1 Identify scope of services		MOU with County	In progress
2.2 Review/Select Service Provider			
2.3 Secure Resources			
A. Develop MOU for Fueling Stations			
<i>3. CMID</i>	Juan Chavez		
3.1 Identify scope of services		FTE from CMID	In progress
3.2 Review/Select Service Provider		Meeting with County	Mtg set in October 2022
3.3 Secure Resources		Meeting with SMEs	Mtg set for Nov 28, 2022
<i>4. CUBS</i>	Wendy Randolph		
4.1 Identify scope of services			In progress
4.2 Review /Select Service Provider			In progress

4.3 Secure Resources			
<i>5. Clerk of the Board</i>			Not Started
5.1 Identify scope of services			
5.2 Review/Select service provider			
5.3 Secure Resources			
<i>6. Real Estate</i>	Jennifer Clausse/Peter Hannan		
6.1 Identify scope of services			Completed Oct 2022
6.2 Review/Select service provider		Reviewed SLA	Completed Nov 2022
6.3 Secure Resources			
A. Develop/Revise MOU			To Be completed by Nov 2023
<i>7. Risk Management</i>	Jeanne Rose/Kirstin Usery		
7.1 Identify scope of services			Completed Oct 2022
7.2 Review/Select Service Provider			In progress
7.3 Discussion with Alliance			
7.4 Secure Resources			
<i>8. Legal Counsel</i>	Lisa Travis		
8.1 Identify scope of services and FTE		Spreadsheet with FTEs	
8.2 Discussion on FTE and scope of services			Met with mgmt. on September 19, 2022
8.3 Reaching out to other agencies			In progress
8.4 Select Service Provider			
<i>9. IT/DTech</i>			
9.1 Identify scope of services			
9.2 Review/select service provider			
9.3 Secure Resources			
<i>10. Environmental Review</i>			Not Started
10.1 Identify scope of services			
10.2 Review/select service provider			
10.3 Secure Resources			
<i>11. Miscellaneous Services (Travel)</i>	Sunny Kenner/ Sandy Burnett		
11.1 Identify scope of services			Mtg scheduled for January 10

11.2 Review/select service provider			
11.3 Secure Resources			

6. Communications

The Communications Department will work closely with the General Manager and project team to communicate projected timeframes, milestones, and decision points to staff. A number of different communications tactics will be utilized to ensure all staff have access to necessary information.

7. Change Management

Like the Communication section above, the Organization Development Team will work closely with the Project Managers, the Project Sponsors, and the General Manager to create and help the project team implement tactics and strategies that leads the people side of this change to achieve its desired outcome with as little resistance as possible.