



August 26, 2022

Ms. Sheila Marquises
Director of Engineering and Transportation
City of San Leandro
835 East 14th Street
San Leandro, CA 94577

Dear Ms. Marquises:

Management Partners is pleased to provide you with this proposal to examine the structure and operations of the Engineering and Transportation Department. The department is responsible for the administration of all engineering services for the City. As part of our review, we will revisit our 2016 Engineering and Transportation Organization Review and use this report as a steppingstone to advance our knowledge of the department and, as necessary, recommend further improvements and optimizations.

Proposed Plan of Work

Based on our experience with organization reviews and our understanding of your needs, we have prepared the following work plan.

Activity 1 – Start Project

Management Partners will begin the project by meeting with you and other appropriate staff. The project start-up activity forms the foundation of the relationship between Management Partners' team and San Leandro's team. During this initial meeting, we will confirm project deliverables and due dates to ensure the project is completed according to schedule and that our proposed scope of work is aligned to meet your goals.

We understand that the work associated with this review is in addition to the normal work of the organization. Our goal is to integrate our activities in a manner that is thoughtful and minimizes disruption to the department.

We will have provided a data request prior to this meeting and will review the material collected by staff to identify any other data needs.

Activity 2 – Gather Information

Next, Management Partners will gather information from staff in the Engineering and Transportation Department. This will allow them to become engaged and share their perspectives about issues in the department and opportunities to innovate and improve. We will learn about existing staffing, organizational structure, operations, policies and practices.

- **Review background material.** We will review the material requested in Activity 1 to begin to formulate an understanding of the department and prepare for our interviews and survey.
- **Review recommendations in Management Partners' 2016 Assessment.** We will review the status of the original 32 recommendations for improvements and determine their continued significance.
- **Conduct interviews.** Management Partners will interview up to 10 individuals to learn about the department's operations, understand different perspectives about strengths and weaknesses, and hear ideas for improving organizational effectiveness in delivering services for the community. We anticipate the interviews will include you, the City Manager, Assistant City Manager, and your division heads.
- **Conduct online survey.** We will use a confidential online survey to allow all staff in the department to provide input. Through the survey, we will learn about what is working well in the department and ideas for improvement.

At the conclusion of this activity, we will summarize results, develop themes, and identify any additional information gathering work that will round out our understanding of the department's operations.

Activity 3 – Conduct Analysis

Next, we will analyze the information collected previously. We will examine the results of our data gathering and assess the current state of the department, including the following:

- Organization structure and reporting relationships;
- Application of best practices; and
- Opportunities to increase efficiency, effectiveness and collaboration.

We will prepare our observations and preliminary recommendations and meet with you to review them. This will be an opportunity to discuss what we learned in our analysis and hear feedback about the opportunities for improvement we have identified. This discussion provides a preview of the issues and recommendations that will be addressed in the project memorandum (Activity 4).

Activity 4 – Report Results

Once we have received feedback on our initial observations and preliminary recommendations, we will prepare the final project memorandum. It will contain our analysis, observations, and recommendations to optimize the City's Engineering and Transportation Department. It will be organized in an easy-to-understand format and presented in a positive and productive manner.

We use a peer review process internally before providing the draft memo to you for feedback. Management Partners retains responsibility for its professional recommendations, but we expect that vetting the draft with key members of your team improves its utility. It also provides a second opportunity to identify implementation issues.

We are committed to recommending actions that result in meaningful operational improvements and can be implemented in the real world. Once comments have been received, the final project deliverable is prepared for you.



Activity 5 – Support Implementation

Management Partners has a strong bias for action. Our recommendations become tools for setting priorities, and for developing work plans. After completing the project deliverable, we will prepare a draft Implementation Action Plan incorporating each recommendation in the project deliverable. The draft action plan sets forth the steps required for implementation, assigns responsibility for action, and an assigned priority level (immediate, near or long term) for initiating each recommendation.

The action plan is prepared as a draft and becomes final once you integrate the action steps into the work plan and establish dates for planned completion. The action plan offers an important management tool for implementation of the work reflected in the project deliverable.

Our Experience and Qualifications

In addition to past organization reviews and assessments we have performed for the City of San Leandro, the following list shows California jurisdictions we have assisted in the past three years with similar work. In addition to the references below, our website, managementpartners.com, has information about our past clients, which includes hundreds of jurisdictions in 44 states, and you are welcome to contact any of them about our performance.

- Alameda County
- Alameda County Transportation Commission
- Albany
- Arcata
- Berkeley
- Beverly Hills
- Brea
- Brentwood
- Concord
- Cypress
- Fairfield
- Fremont
- Fullerton
- Hayward Area Recreation and Park District
- Huntington Beach
- Metropolitan Transportation Commission
- Milpitas
- Mission Viejo
- Monterey County
- Moorpark
- Napa
- National City
- North Coast County Water District
- Novato
- Orange County Employees Retirement System
- Orange County
- Pacifica
- Perris
- Pinole
- Pleasant Hill
- Pleasanton
- Riverside
- Sacramento
- San Bernardino County
- San Bruno
- San Francisco
- San Gabriel Valley COG
- San Joaquin County
- San Jose
- San Leandro
- San Marino
- San Mateo County
- Santa Clara County
- Santa Cruz Water Department
- Santa Rosa
- Scotts Valley
- Simi Valley
- Tracy
- Transbay Joint Powers
- Union City
- Vallejo
- Walnut Creek
- Westminster
- Woodland





Our Team

We have a strong project team that is well qualified to complete this work for the City's Engineering and Transportation Department. Amy Paul will serve as project manager and will be responsible for execution of the project. She will be supported by Dave Sykes, Teri Cable, and Jessica Oliphant. Brief qualifications of each are provided below. This assigned team is currently working with the City to review the City's Public Works Department.

Amy Cohen Paul, Corporate Vice President

- Has **more than 30 years of experience in local government management, performance measurement and strategic planning.**
- Has **assisted public-works departments** in Benicia, Burlingame, Huntington Beach, Long Beach, Pasadena, San Joaquin County, Vallejo and Woodland, California; South Miami and Fort Lauderdale, Florida; and Surprise, Arizona.
- Assists public agencies in **developing strategic and business plans**, conducting organization reviews, implementing organizational improvements, identifying alternative service delivery methods, and **designing and implementing performance management systems.**
- Was one of the **original management team of the International City/County Management Association's Center for Performance Measurement** and helped produce ICMA's training materials on outcome measurement. Editor of the book *Managing for Tomorrow: Global Change and Local Futures* and is the author of many articles in professional publications, including *The Municipal Year Book*.



Dave Sykes, Special Advisor

- Has **35 years of local government experience**, including service as a city manager, chief operating officer, **public works director**, city engineer, interim director of Planning Building and Code Enforcement, and a variety of other management positions.
- Served as **city manager of the City of San Jose**, leading a workforce of over 6,600 employees and overseeing a \$4.7 billion annual operating budget for America's 10th largest city.
- Extensive experience with **coaching and mentoring**, along with change and **process improvement**; expert in leading implementation on policy issues and **strategic administrative process improvements.**
- Has **led successful reorganization efforts**, managing change through extensive communication, sincere workforce engagement, and the **development of a realistic roadmap.**
- As city manager, **developed and focused on eight near-term priorities** for San Jose. They included emergency management and preparedness; housing creation and homelessness prevention; vibrant, safe and inclusive neighborhoods and public life; the future of downtown; private development services; 21st century infrastructure; strategic fiscal positioning and resources deployment; and creating a diverse, talented and engaged workforce.



Teri Cable, Senior Management Advisor

- Has decades of **analytical, budget, grants management and outsourcing experience**.
- Develops effective, long-term **private-sector partnerships** to provide quality public services in an efficient manner.
- Has consulted with government leaders with a variety of **organizational assessments** and projects, including Long Beach, Beverly Hills, Pasadena, Anaheim, Huntington Beach, Irvine, Newport Beach, Oxnard, San Mateo, Riverside, Pleasanton, Fullerton, Mission Viejo, Pacifica, South Gate, Seal Beach, Santa Clarita and San Bernardino.
- Served as administrative and enterprise services manager for the City of Santa Ana Public Works Agency, where she developed special expertise **negotiating and managing complex contracts for services** such as refuse hauling, landscape maintenance and street lighting.
- Directed the development and implementation of the agency's \$117 million annual budget, and managed operations of the Santa Ana Regional Transportation Center and various real property leases.
- Held management positions with the City of Orange and the Orange County Health Care Agency; has **policy-making experience** as an elected director of the East Orange County Water District.



Jessica Oliphant, Management Analyst

- Experienced in many facets of local government management, including budget preparation and analysis, process improvement, community engagement, and understanding the fiscal impacts of policy changes.
- Served as a budget analyst in the Finance Department of the City of Kansas City, Missouri and was a Cookingham-Noll City Management Fellow in Kansas City's City Manager's Office. Duties included analyzing large fiscal datasets, developing fixed cost rates, analyzing historical budget trends, and improving the process of applying to the City's Board and Commissions.
- Won an All-America City award based on her research of innovative programs in response to the Covid-19 pandemic.
- Also served in the AmeriCorps VISTA program, as a research assistant examining management techniques, and as an intern in the ACLU's Women's Rights Project.
- Received a master's degree in public administration from New York University's Wagner Graduate School of Public Service and a Bachelor of Arts degree in public policy, also from New York University.



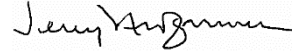
Hours and Cost

Management Partners anticipates devoting 234 hours of our staff time to complete the plan of work described above. The total cost of this project is \$39,900, 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.



Please let me know if we can provide any additional information.

Sincerely,



Jerry Newfarmer
President and CEO

Accepted for the City of San Leandro by:

Name: _____

Title: _____

Date: _____

