



July 22, 2022

Ms. Debbie Pollart  
Public Works Director  
City of San Leandro  
14200 Chapman Road  
San Leandro, CA 94578

Dear Ms. Pollart:

We appreciate the opportunity to provide this proposal to conduct an organization assessment of San Leandro's Public Works Department. We understand the goal is to take a fresh look at the organizational structure and staffing, to ensure the department has the optimum structure to provide services to the community. As part of this project, we will analyze data in the department to identify potential future retirements, key positions where succession planning will be key, and succession planning tools.

The Public Works Department has about 93 full-time and 11 part-time employees who are responsible for operating, maintaining and treating a vast array of infrastructure and services through its four divisions:

- Administration Division, which includes the Storm Water Program, Sustainability, and Solid Waste and Recycling Sections.
- Facilities and Open Spaces Division, which includes the Equipment Maintenance, Building Maintenance, Park Maintenance, and Shoreline Operations sections.
- Street Maintenance Division, which includes the Street Services, Pavement Maintenance, and Traffic Maintenance sections.
- Water Pollution Control Division, which includes Plant Maintenance, Operations, Collection System Maintenance, Laboratory Services, and Environmental Services.

As you may know, 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.

### **Proposed Plan of Work**

Based on our experience with organization reviews and our understanding of the needs of the Public Works Department, we have prepared the plan of work below. It is amenable to refinement as necessary. We will include the following activities.

- Review the current organizational structure, staffing levels, and spans of control.

- Identify succession planning tools to help prepare for retirements and separations.
- Provide recommendations pertinent to the department's organizational structure and staffing levels.

Management Partners has extensive experience with similar work and is prepared to reach your goals for this project. We make a commitment to quality and timely performance with each client we serve.

### **Activity 1 – Start Project**

We will begin this project by meeting with you and others you designate to discuss the details of the project approach and execution. The project start-up activity forms the foundation of the relationship between Management Partners and your team. During this initial meeting, we will confirm deliverables and due dates to ensure the project is completed on time and on budget and that our proposed scope of work is aligned precisely to meet your goals. It will also be important to introduce this initiative to department managers and employees properly to ensure a good start. We will discuss communication protocols during this meeting as well.

We will have provided a data request prior to this meeting and will review the material provided in advance. This will likely include budgets, staffing, departmental strategic or business plans, prior studies, employee turnover data, as well as data on the full-time workforce in the department (e.g., age and length of service by position).

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.

### **Activity 2 – Gather Information**

Next, we will conduct a high-level analysis of the organizational structure, staffing and spans of control. We will conduct up to 20 interviews with you, the deputy director, and managers and supervisors in the Public Works Department to understand different perspectives about strengths and weaknesses, staffing levels, workload, training and promotional opportunities, and to hear ideas for improving efficiency and effectiveness. We plan on conducting most of the interviews onsite and some remotely, depending on the Pandemic.

To provide an opportunity for all employees to share feedback about the Public Works Department's structure and workload, we will design and administer an electronic survey for all department employees. We will develop a draft and review it with you before finalizing it. We want to ask their opinions about staffing, workload, training and professional development, and other issues that arise during the interviews. We will work with you to ensure that any employees who do not have access to a computer are able have access to a paper copy. 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 Public Works Department's structure and staffing.

### **Activity 3 – Analyze Organization Structure and Staffing Levels**

Using the information from interview and our review of data and documents, we will analyze the Public Works Department's structure, staffing, workload and spans of control, taking into account best practices in the industry as well as what is working well. We will examine each division and consider alternative structures, as warranted. Workload and priorities will be important as we consider any



changes to recommend. As we consider recommendations, we will also identify alternative service delivery models as appropriate.

#### **Activity 4 – Plan for Succession**

Given turnover rates in cities across the country and increasing retirements of managers in many organizations, succession planning is a critical element in every local government. A key element for any succession planning program is helping current staff understand what they need to do to prepare for advancement. Doing so helps contribute to employee retention. As part of this activity, we will do the following:

- Analyze data pertaining to potential retirements to identify key at-risk positions.
- Identify associated skills and competencies for up to ten key at-risk positions.
- Provide a knowledge transfer template to be used for succession planning purposes.
- Identify training and development activities that are currently available and those that might be needed to successfully prepare staff to fill senior positions as they become available.

#### **Activity 5 – Report Results**

During this activity, we will prepare our observations and preliminary recommendations and meet with you and others you designate to review them. This will be an opportunity to discuss what we learned and observed in our analysis, and to 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 report.

Once we have received feedback about the various recommendations and succession planning elements, we will prepare a draft report. It will include our analysis and recommendations about the organization structure, staffing, spans of control, and succession planning elements. We will present the draft for review and comment. At the conclusion of the review period, we will consider all changes and suggested revisions and prepare the final report.

Reports prepared by Management Partners are rich in detail, with recommendations supported by quality analysis. We take pains to ensure that our analysis and subsequent recommendations are organized in an easy-to-understand format and presented in a positive manner. Management Partners is 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 report will be prepared, peer reviewed, and then transmitted to you.

#### **Activity 6 – Support Implementation**

Management Partners has a strong bias for action. Our reports and resulting recommendations become tools for setting priorities, and for developing work plans. After completing the project report, we will prepare a draft Implementation Action Plan (IAP) incorporating each recommendation in the project report. 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 the director integrates the action steps into the work plan and develops dates for planned completion. The action plan offers an important management tool for actual implementation of the work reflected in the project report.



With most of our project reports, Management Partners takes another discrete step to improve communications and transparency within the organization, by sharing the final action plan with the chief executive of the local government, accompanied by an appropriate cover letter. This conveys the work planned and underway to improve efficiency and effectiveness, and elevates the entire organizational improvement process to the attention of top management within the local government. We have learned that this step builds support and understanding for the improvements outlined in the IAP.

## **Our Experience and Qualifications**

In addition to the references below, our website, [managementpartners.com](http://managementpartners.com), has information about our past clients, which include hundreds of jurisdictions in 44 states, and you are welcome to contact any of them about our performance.

### **City of Pacifica, California ⇒ Public Works Department Assessment**

Management Partners conducted a detailed review of Public Works Department operations to determine how to better integrate programs and staffing to provide more seamless services to the community. The department had been created in recent years by merging two previously separate functions: Engineering and Field Services, and Wastewater Services. Our work included extensive outreach to staff, including an employee survey, a gap analysis focused on managers and supervisors, multiple focus groups, and numerous employee interviews. We also compared Pacifica to peer agencies with an emphasis on the department's organization structure and the placement of its various programs. Our recommendations focused on providing unifying leadership and communicating the department's strategic direction clearly to all staff. Other focus areas involved internal communication, teambuilding, succession planning, performance measurement, training, and improved technology.

**Contact:** Kevin Woodhouse, City Manager  
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(650) 738-7409  
[woodhouse@ci.pacifica.ca.us](mailto:woodhouse@ci.pacifica.ca.us)

### **Woodland, California ⇒ Public Works Organizational Review**

Management Partners was retained by the City of Woodland to analyze the service delivery, staffing, and organizational structure of the Public Works Department. The department is responsible for maintenance of City streets, electrical, parks, facilities and fleet as well as managing environmental resources and utilities operations. Our approach included interviews, focus groups, an employee survey, peer benchmarking and best practice research. These contributed to recommendations that included a new organizational structure, several staffing changes, and improvements to internal processes, technology, and business systems.

**Contact:** Mr. Paul Navazio, Former City Manager of Woodland  
Director of Finance  
Incline Village General Improvement District  
893 Southwood Blvd.  
Incline Village, NV 89451  
Office: (775) 832-1365  
[pcn@ivgid.org](mailto:pcn@ivgid.org)



## City of Fort Lauderdale, Florida ⇒ Public Works Department Succession Planning

Management Partners was retained by the City of Fort Lauderdale's Public Works Department to design a succession planning program. The department anticipated a great deal of turnover in leadership and staff positions, with more than 27% of the workforce eligible for retirement during the upcoming two years from start of the project. We worked with a staff team throughout the project to get feedback and input through each step. We developed and deployed a core competencies survey for employees in the department. The Wastewater Division was used for a pilot project because there were 12 positions deemed as critical for succession planning. We conducted interviews with individuals in those positions and developed position profiles that include important components about getting the job done, training, historical knowledge, and contacts necessary for the job. The profiles serve as a repository of important information and a resource for prospective and incoming staff. Once the profiles were reviewed and completed, we conducted training on the tools and approaches of the succession planning program so the department had capacity to roll out the pilot program to all. This project was the subject of an article in the August 2017 issue of the American Public Works Associations' Reporter Magazine.

**Contact:** Mr. Paul Berg, Retired Fort Lauderdale Public Works Director  
(954) 870-3767  
[Pbjerga72@gmail.com](mailto:Pbjerga72@gmail.com)

## Our Team

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

### 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*.



### John Stufflebean, Special Advisor

- **More than 36 years of experience** in local government, including 24 years as a department head, **primarily in public works.**
- Served as **director of environmental services for the cities of Sunnyvale and San Jose**, California, overseeing wastewater collection and treatment, water supply, watershed protection, waste management, environmental policy, and the business administration of the utilities.
- Supervised a staff of **more than 500 employees in San Jose and an annual budget of \$250 million.** In Sunnyvale supervised a staff of 115 with an annual budget of \$125 million.
- Also served as **director of environmental management** for the City of Kansas City, Missouri; **director of solid waste management** in Maricopa County, Arizona; and solid waste manager in Pima County, Arizona.
- After retiring from the City of Sunnyvale in 2016, served as a **sustainability consultant** to four organizations in Australia. **Registered professional engineer.**



### 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; 21<sup>st</sup> 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**

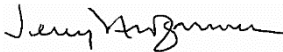
- Experienced in many facets of local government management, including budget preparation and analysis, process improvement, community engagement, and understanding the fiscal impacts of policy changes.
- Served as a budget analyst in the Finance Department of the City of Kansas City, Missouri and was 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 229 hours of our staff time to complete the plan of work described above. The total cost of this project is \$46,990, 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: \_\_\_\_\_

