

7.2.3.1 Identification of tasks to be performed;

The following is our proposed task plan to provide services to the City of Schertz in response to the issued RFP for a Staffing Level Study.

Task 1 | Develop an Understanding of the Operations, Organization and Management of Functions in the City of Schertz

It is important that the project team understand, in detail, how each department is staffed, organized, operated and managed in order to effectively assess efficiency, effectiveness and evaluate staffing allocations. Additionally, it is important that the project team understand basic service delivery targets; current service levels, and where there may be overlaps and gaps. To develop this understanding, we will accomplish the following work steps – among others:

Conduct individual interviews within each department to understand the existing plans of organization as well as key organizational issues facing each department/function.

Develop descriptions of the staffing and responsibilities for staff in each function. Document trends in staffing and identify gaps, if any, in key service areas/skills.

Develop an understanding of the scope of the programs and services for each function.

Document historical, current and projected workloads, costs, and service levels for each function.

Develop an understanding of key performance indicators for each department/function.

Develop an understanding of the major management systems to plan and schedule, monitor and adjust approaches to providing services.

Document the major software and technology employed throughout the City and develop an understanding of the current levels of utilization.

Review major documents to gain an understanding of the operational practices of the City and to understand the financial and legal constraints the City is operating under. These documents would include the current and recent budgets, policy documents, work rules and personnel manuals, job descriptions, regularly generated management reports, available operational statistics, mission statements and any available performance indicators.

A profile documenting the current service delivery approaches and staffing allocations would be developed at the end of this task.

TASK RESULT

A summary profile of each department’s organization, staffing and operations. These descriptive profiles would be structured to provide a baseline summary valuable for later analysis.

Task 2 | Conduct a Survey of Employee Attitudes Toward Current Staffing, Services, Organization and Management Issues.

It is critical for the project team to develop strong input regarding current operational and organizational issues from staff. The use of an employee survey would provide employees within the organization, beyond those interviewed, the opportunity to provide input into this process. It will also enable all staff an additional opportunity for input.

To provide a major avenue for employee input at the outset of the project, we plan to prepare a questionnaire, which would be designed to:

Document attitudes toward the types, levels and quality of services provided.

Document attitudes toward the balance of work and staffing.

Elicit attitudes toward organizational elements such as coordination of staff and services, internal management of operations, scheduling and deployment, and the like.

Document perceptions regarding key management issues such as planning of work to be performed, internal communications and the like.

Obtain employee views about opportunities to restructure services, reduce costs, etc.

Questionnaires would be structured to document the attitudes toward issues and systems, which are organization-wide, and also attitudes toward issues which are unique to each operating department. Questionnaires would be confidential and conducted via an online survey service.

TASK RESULT

The product of this task would be a narrative and analytical summary of response patterns on an organizational and departmental basis.

Task 3 | Conduct a "Best Management Practices" and Comparative Assessment of Organization, Staffing and Management.

In this task, our project team will utilize “best management practices” and a comparative

survey to evaluate staffing, select processes, use of technology, management planning, as well as many other dimensions of organizational performance for the functions under review. This will assist us in evaluating the appropriateness of staffing allocations and needs for the City of Schertz. To accomplish this, we would undertake the following activities:

Best Practices Comparative Assessment – The project team would develop a detailed list of "best management practices" for use in a diagnostic appraisal of staffing allocations for each service function. This diagnostic appraisal would additionally utilize recognized staffing benchmarks to assess current staffing allocations based upon recognized operational practices and staffing levels and consider the impact of technology and processes on staffing.

Comparative Survey – Additionally, we would compare organizational structure, staffing levels, and management performance indicators with five (5) comparable public entities. The comparative survey would benchmark the City against the comparable entities in Texas on factors including staffing, service levels, organization and management approaches.

A summary of the findings from these two efforts would be developed as an interim delivery and shared with the project steering committee.

TASK RESULT

An assessment outlining how the City's current staffing, service delivery, organization and staffing compare to best practices and comparable Texas cities and identifying gaps or deviations from expected levels.

Task 4 | Develop an Organization, Operational and Staffing Assessment of Current and Projected Services.

In this important work task, opportunities for improving the organizational structure, management, operations and staffing will be analyzed. This task will include such approaches and methodologies as the following:

Evaluate the organizational structure in each Department. We will evaluate organizational structure in terms of gaps or overlaps in function, spans of control and appropriate organizational location.

- Is the organization structure too "tiered" or too "flat" from the management staffing perspective?
- Are functions placed too high or too low in regard to their importance in meeting operating and service objectives?
- Are spans of control too broad or too limited?
- Are there any overlapping or duplicated functions?

Evaluate staff utilization and deployment compared to service levels and workload. This analysis will evaluate staff utilization by comparing staffing allocations against both current and desired service levels and existing and projected workload. This component will also assist us in developing the future staffing requirements and metrics needed to forecast potential future staffing requirements.

Evaluation of the adequacy of major work practices. The analysis will focus on identification of opportunities to streamline work practices to increase utilization levels and/or reduce staffing requirements. Through the analysis of major work practices, the consulting team will determine:

- The frequency of various work tasks now performed is unnecessary or can be reduced.
 - Some work tasks can be eliminated.
 - Skill mix for positions can be improved.
 - Effectiveness of the use of technology to simplify work activities and deliver services.
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Analyze the effectiveness of managing performance in the City: Departmental operations require effective management to ensure that staff are appropriately scheduled, deployed, utilized and held accountable for performance. The project team will evaluate this in terms of the following:

- How do managers plan, schedule and control the work to be done in each of the City's organizational units?
 - Do managers have accurate and timely measures of the performance of each unit?
 - How are goals, objectives and service level targets developed?
 - How is 'customer service' defined, promoted and supported?
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Analyze the overall organizational structure of the City: In this analysis, we will recommend any modifications to department structure (i.e. – reallocation of units or responsibilities) to increase service delivery or more effectively utilize staff resources.

Analysis of these components will result in the development of detailed recommendations regarding:

- Specific staffing required, given acceptable utilization levels, and an appropriate organizational structure for each department/office and the overall City organization.
- Staffing forecasts at a departmental level, showing potential staffing impacts based upon community growth, workload expansion or other factors that may drive staffing changes.
- Operational improvements or technology utilization that will increase staff efficiency or effectiveness and increase service to the public.
- Development of appropriate performance metrics for each service area/program.
- Specific steps that need to be taken to reach reasonable utilization levels, including
 - Specific changes in existing work methods and practices.
 - Adjustments in existing planning and scheduling techniques.
 - Where appropriate, specific steps that could be taken to adjust existing operating systems with positive impact on staff utilization.
 - Changes that warrant modification to employee job descriptions.
- Effect of the proposed staffing model on achieving the City's service goals, performance targets, and impacts on staff (productivity, retention and morale).

Develop recommendations to enhance operational practices, improve staff utilization, and best utilize existing financial resources based on current and projected workloads and service demands.

TASK RESULT

The result of this task would be a detailed analysis of the organizational, management and operational choices in service delivery, service levels and the staffing needs in each Department and the City overall.

Task 5 | Prepare a Draft and Final Report and Provide Implementation Plan.

Upon the conclusion of the assessment, we will prepare a detailed report which summarizes the results of each of the previous work tasks described above. This report includes the following:

A description of the methodology by which we conducted the study, including our approach, interviews, survey methodology, and the methods by which we obtained review and feedback from the City.

A detailed evaluation of department/office staffing and management with specific recommendations on current and projected staffing requirements tied to service levels.

A detailed analysis of major work processes, and recommendations for improvement in methods of service delivery to utilize staff and financial resources more efficiently and effectively.

Recommendations for specific performance metrics for each functional area to manage and measure performance.

Implementation plans covering all recommended improvements consisting of specific work steps; suggested responsibility for implementation; timing and sequencing for the accomplishment of each work step; as well as the cost and/or savings associated with implementation.

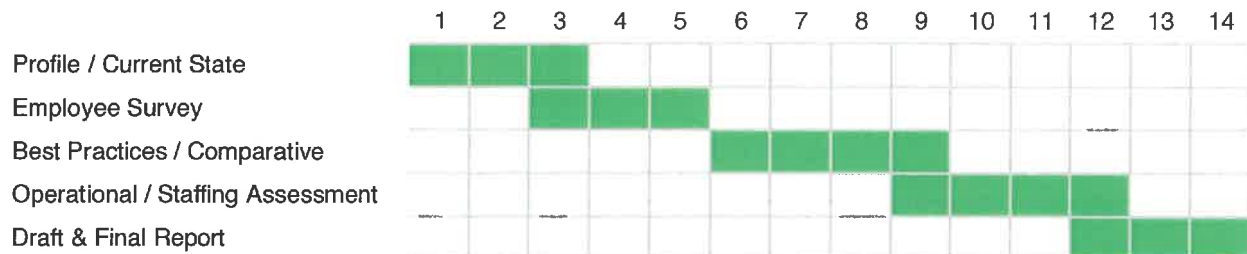
The analysis would be reviewed in draft form with staff. Once this review is completed, the project team will review all comments received, edit and finalize the report and present the final report to the City in a public meeting.

TASK RESULT

The result of this task would be the draft and final report and implementation plan together with all of the technical documents developed during the study process. We would present the final report to the City, as requested.

7.2.3.2. Time frames to perform the identified tasks;

The following is our proposed project schedule to conduct this engagement. As shown, we are proposing to complete the engagement over a fourteen (14) week schedule.



We are amenable to discussions on changes to the project schedule to best meet the City’s needs.

7.2.3.3. Project management methodology;

Our success is due in part to the effective formal project management techniques that we utilize in our studies. These techniques include:

- All project work activities are defined in advance and tied to each project team member, deliverables, the schedule and the budget.
- The project manager briefs each project team member on their roles and expectations. This is accomplished in writing and in person.
- The project manager and lead analysts develop general and project specific data collection plans and interview guides for all of our staff.
- Project team and client expectations and results are managed on a weekly basis by developing and utilizing formal project schedules and reporting tools.
- The project manager designs and personally reviews all interim and final products before they are delivered to the client.
- We have frequent client review meetings to discuss the quality and direction of the project through interim deliverables.

These project management approaches have resulted in all of our projects being delivered at a high level of quality, on time and on budget.

7.2.3.3. Project Change control procedures; and

Once we are under contract with a client, we utilize a formal project change management process should any changes be needed to the scope of work. If our client requests a change in project scope, we will discuss the impact to the project (specifically timeframe for completion, work level and effort, and pricing impact, if any) and develop a modification to the contract outlining all changes. Both parties will sign the change order modifying the original contract's scope of work, project schedule, or pricing – as applicable. In our experience providing services for over 17 years, less than 5% of projects have a formal change in scope during the engagement.

7.2.3.4. Implementation strategy.

As part of our final report, we provide as a section of the Executive Summary, a listing of key recommendations with details regarding when the implementation should occur (timing), the fiscal impact of the change (cost increase or reduction), the priority of the recommendation (in terms of impact on organizational performance), and responsible party (who should be responsible for implementation of the recommendation). Together this matrix provides a detailed implementation plan that can be utilized to guide and measure implementation progress after the study is completed and adopted. This implementation planning component is developed in conjunction with the client and reviewed prior to finalization.

- (d) Section 7.2.4: Proposer will describe the types of reports or other written documents Proposer will provide (if any) and the frequency of reporting, if more frequent than required in the RFP. Proposer will include samples of reports and documents if appropriate.**

We typically conduct periodic progress updates on a biweekly basis (unless desired more frequently by the client) during the engagement. These cover overall project status updates including: project schedule, a summary of work completed and work planned over the next several weeks, and any issues that have been encountered along with suggestion on how to address.

More formal and substantive reviews are conducted on the interim deliverables developed at the completion of each task as outlined in our proposed task plan for providing services. These interim deliverable reviews are critical to ensure our client is kept aware of the findings and issues we have identified and to discuss potential alternatives or tentative recommendations as they are being developed. These reviews have been important to helping us develop actionable, tailored and suitable recommendations for our clients. These review meetings typically occur a week or two following the completion of the interim document and its distribution to the client. This provides time for the client to thoroughly review the document prior to discussion.

3. Section 7.3: Miscellaneous.

- (a) Section 7.4.1: Proposer will provide a list of any additional services or benefits not otherwise identified in this RFP that Proposer would propose to provide to City.**

We are not proposing any additional services to provide to the City at this point. We believe our proposed task plan highlights the approaches necessary to comprehensively assess the staffing needs of the City of Schertz and that our extensive experience conducting these studies will provide the highest quality of services to the City on this engagement.

- (b) Section 7.4.2: Proposer will provide details describing any unique or special services or benefits offered or advantages to be gained by City from doing business with Proposer. Additional services or benefits must be directly related to the good and services solicited under this RFP.**

The unique benefit of working with the Matrix Consulting Group is that our firm is staffed with technical experts in all aspects of local government service and all individuals assigned to this engagement are full-time employees of the firm. We are not proposing the use of any subcontractors. This has significant benefits to our clients as they get a project team that has worked together on dozens of studies and have a consistent approach to work efforts, data analysis, issues identification, and report development.

- (c) Section 7.4.3: Does Proposer have a contingency plan or disaster recovery plan in the event of a disaster? If so, then Proposer will provide a copy of that plan.**

As a professional services consulting firm, the principal potential impact to our clients is the loss of our work product developed by our staff during the term of the engagement. Our corporate practices dictate that all staff routinely and frequently conduct backups of their computer systems to the cloud. This ensures that in the event of any event that results inoperability or loss of work laptops that staff have immediate access to critical work files through cloud storage. This approach eliminates the potential for any negative impact to our clients. Our staff receives annual training and reminders of this critical practice during training at our annual meeting.

3 Overview of Proposed System/Scope of Services

We understand that the City of Schertz is seeking to have a comprehensive assessment completed of its entire workforce of approximately 420 employees. The City is a full-service city providing the public with a range of services including administrative services, community development (planning, building, etc.), public safety and EMS, infrastructure management and maintenance, utility services and parks, recreational and cultural services. The overall goal is to develop an optimal staffing model based upon workload, effective performance, suitable service delivery levels, and community priorities.

The specific scope outlined by the City in the RFP includes the following key elements:

- Review of current state of City staffing.
- Assessment of the duties, responsibilities and expectations of job roles necessary to staff City programs and departments.
- Comparison of existing City departments to other like-situated municipalities.
- Identification of gaps and determine if desired outcomes are being met or if deficiencies in service are related to staffing challenges.
- Analysis of staff overtime and on-call usage causes and identification of alternative solutions.
- Identification of other staffing resources needed to ensure staff can sufficiently perform their required responsibilities.
- Recommendations to enhance efficiency and effectiveness of City staffing and operations from a system perspective.
- Forecast of the future needs of City taking into consideration both short-term and long-term objectives, community growth and any other factors that could change staffing requirements.
- Effect of staffing model on outcomes, productivity, retention and staff morale.

Our proposed task plan, detailed in other sections of our response, has been developed to specifically enable us to conduct a comprehensive assessment of the staffing needed by the City of Schertz.