

City of Corpus Christi  
**Citywide Work Management Program**



**Project Plan – Version 3.4**

*April 5, 2004*



# Table of Contents

**PROJECT DESCRIPTION.....4**

**SCOPE OF WORK - INTRODUCTION.....4**

Scope Section 1. Utility and Solid Waste Pilot .....5

Phase 1. Program Initiation .....5

Phase 2. O.N. Stevens.....6

Phase 3. Wastewater Treatment Plants.....8

Phase 4. Water Distribution and Wastewater Collection.....10

Phase 4a. Process Analysis and Reinforcement of New Practices .....12

Phase 5. Expand Technology Access .....12

Phase 6. Warehouse, Utility Billing, and PeopleSoft and HTE Interfaces .....13

Phase 7a. CQM (City Manager’s Office), Restaurant Inspections, and Fire Hydrants .....15

Phase 7b. Solid Waste - Collection .....16

Phase 13. Streets.....17

Phase 7c. Solid Waste - Landfill .....19

Phase 8. Stormwater .....21

Phase 8a. Process Analysis and Reinforcement of New Practices .....22

Phase 9. Gas .....23

Phase 10. SCADA Integration and Field Unit Pilot .....25

Phase 11. Broad Field Unit Deployment.....26

Phase 12a. Process Analysis and Reinforcement of New Practices .....26

Scope Section 2. Citywide Extension.....26

Phase 12b. Facilities Maintenance.....27

Phase 12c. Park and Recreation.....28

Phase 12d. Health .....30

Phase 14a. Airport – Software Only.....31

Phase 14b. Airport Reengineering.....32

Phase 15. Police and Fire.....33

Phase 16. Extension of Field Unit Program .....35

Phase 16a. Process Analysis and Reinforcement of New Practices .....35

Phase 17. Housing and Community Development, Museum, Library, Convention Center, MIS, Planning, and Fleet Interface.....36

Phase 18a. Customer Service Call Center Procedures and Start-up .....38

Phase 18b. Customer Service Call Center Work Management Roll-out .....39

Scope for FY 2002-2003 .....39

**PROJECT TEAM .....41**

**DETAILED SCHEDULE OF REMAINING MEETINGS .....43**

**GENERAL PROGRAM SCHEDULE .....52**

**2004 PROJECT ACTIVITIES – STREETS AND SOLID WASTE.....53**

**2004 PROJECT ACTIVITIES – STREETS AND SOLID WASTE (CONTINUED).....54**

**2004 PROJECT ACTIVITIES – PARK AND REC / FACILITY MAINTENANCE.....55**

**2004 PROJECT ACTIVITIES – CALL CENTER .....56**

**2004 PROJECT ACTIVITIES – SCADA INTEGRATION, FIELD UNIT PILOT, REINFORCEMENT .....57**

**2004 PROJECT ACTIVITIES – HTE / UBO / MISC. ....58**

## Project Description

As part of an ongoing re-engineering initiative, the City of Corpus Christi is implementing a work management program. This program will combine state-of-the-art maintenance practices with modern technology.

The mission of the Work Management Program is to manage our work and infrastructure effectively and efficiently through improvements in work processes, organizational coordination, and automation.

The City has piloted the program in its Water, Wastewater Storm Water, and Gas utilities. It is now extending the program to General Fund departments, including Streets and Solid Waste (Collection), Park and Recreation, and Facility Maintenance.

## Scope of Work – Introduction

This scope of services is divided into two sections:

- Utility and Solid Waste Pilot
- Citywide Extension

Each section is further divided into phases. Each phase concludes with observable milestones, which usually include reports produced by and reflecting the new business practices and technology. This scope of work assumes that the City has designated the following individuals:

- **City Program Coordinator**, who works full time on program implementation, monitors implementation progress and maintenance productivity, and provides ongoing, internal consulting services to ensure that the City continues to enforce the reengineered practices and improve productivity. This individual is also responsible for managing a communications plan related to the program. **The City has designated Steve Klepper.**
- **City System Administrator**, who manages the software and, with assistance from other MIS personnel, manages the servers and databases that support the work management program. **The City has designated Amber Johnson.**
- **Department Project Leaders**, who spearhead the implementation process within their departments, ensure that all data collection and job plan development work are completed on schedule, and communicate regularly with all department personnel about the new business practices, technology, and program schedule.

This scope of services identifies activities performed by City team members as well as the activities performed by EMA. When EMA obtains technology as part of this program, the purchase will be executed on behalf of the City, and the City will be the licensed owner of the technology.

This scope of services represents multiple years of work. Each fiscal year, the City will identify a subset of phases (or specific tasks) that the City wishes to complete under the contract for that fiscal year. During the course of the fiscal year, the City Program Coordinator and EMA may concur that it is advisable to pursue different phases or tasks than originally anticipated. These decisions may reflect a desire to coordinate with other City projects, or they may reflect technical requirements of the City's other information systems. In these events, the City and EMA will agree on the percentage of the total phase cost attributable to the subject task(s), and this percentage will be documented in the notice to proceed.

Completed tasks and phases are shown in **plum**. Scope that is anticipated for the current year is displayed in **dark blue**. All remaining scope (for future years) is in ordinary black text.

***Scope Section 1. Utility and Solid Waste Pilot***

***Phase 1. Program Initiation***

(ALL PHASE 1 TASKS WERE COMPLETED UNDER PROJECT 8380, FY 2001-02)

This phase establishes the implementation teams, introduces general work management process, and sets City standards. It also installs hardware and software to support the first few phases.

**Task 1.1 Establish Teams and Communication Plan**

City will designate the Program Coordinator, System Administrator, and the Departmental Project Leaders for the pilot (O.N. Stevens, Wastewater Treatment Plants, Water Distribution, Wastewater Collection, Storm Water, Gas, Solid Waste, CQM, Health (restaurant inspections), Fire (hydrant maintenance), Utility Billing, and Warehouse). Consultant will conduct a kick-off meeting to explain the scope and schedule, discuss the roles of all participants, and establish a general communications plan to be managed by the City Program Coordinator. This communications plan will address regular communication with City leaders and will provide a framework for the departmental communication plans needed in the ensuing program phases.

**Task 1.2 Detailed Calendar of Activities**

Consultant will work with the Program Coordinator, System Administrator, and Departmental Project Leaders to prepare a detailed calendar of activities for the pilot phases.

**Task 1.3 Standards Workshops**

Consultant will conduct a series of workshops to introduce general work management concepts and establish standards for the City program. Consultant will suggest two or three viable options for each standard, and the City team will determine and refine the final standard. These standards will guide the configuration of the Work Management System. Workshop topics and standards include:

- Review best maintenance practices and asset life cycle management;
- Review work order life cycle and establish high-level work flow and roles;
- Establish standard backlog and cost reporting requirements
  
- Set standard work priorities
- Set standard asset and part criticality levels
- Set standard asset condition ratings
- Set standard work order statuses
- Set standard work types
- Set standard performance criteria
- Set standard City asset hierarchy
- Set standard location specification templates

- Set standard asset types and specification templates
- Review location and asset data collection procedures
- Review problem type definition procedures and data collection templates

#### Task 1.4 Prepare Development and Training Environment

Consultant will purchase the necessary technology and will work with the City's System Administrator and supporting MIS personnel to install database and application servers, the development and training database instances, and the server work management software. The City will identify development and training facilities (office/classroom space and networked computers), and Consultant will work with the City System Administrator to load client work management software on development and training PCs. Consultant will provide minimum PC standards for end users, and City MIS staff will work with departments to define and schedule any needed PC upgrades. City MIS staff will provide the following digital files from existing City databases: List of employees with their departments/divisions and their hourly rates; list of items stocked by City warehouse and their average costs; list of valid street names and addresses; list of service addresses from billing system; chart of accounts; and other lists as may be needed to complete the specification templates. Consultant will load the digital data into the development and training databases.

#### Phase 1 Milestone

Report of City Work and Asset Management Standards, including:

- Standard work priorities
- Standard asset and part criticality levels
- Standard asset condition ratings
- Standard work order statuses
- Standard work types
- Standard performance criteria
- Skeletal City asset hierarchy (major categories)
- Standard asset and location specification templates

#### *Phase 2. O.N. Stevens*

(ALL PHASE 2 TASKS WERE COMPLETED UNDER PROJECT 8380, FY 2001-02)

This phase introduces the work management practices and technology to the O.N. Stevens Water Treatment Plant.

#### Task 2.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Lead to identify the business unit's planner/schedulers. Consultant will conduct a workshop with all planner/schedulers to introduce the work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and

will refine the detailed schedule for business unit implementation. Representatives from other business units will be invited to observe the workshop.

#### Task 2.2 Data Collection

The City Program Coordinator and Departmental Project Lead will assemble a Data Collection Team of representatives from the business unit. This team will be responsible for the data collection effort, which will be coordinated by the Departmental Project Leader. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and data collection support. The City Business Unit Team will gather all location, asset, and problem data, and Consultant will review data and load it into the development and training databases.

#### Task 2.3 Practices Modeling

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers and workers to refine the business unit's work/maintenance practices. Consultant will conduct a series of workshops with this team to capture current procedures for work/maintenance activities and reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structure. Representatives from other business units will be invited to observe the workshop.

#### Task 2.4 Skills Inventory

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshop.

#### Task 2.5 Software Configuration

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and job plan development support. The business unit team will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. The City System Administrator will load client software. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment. Consultant will work with the System Administrator to establish interim procedures for refreshing data on employees, stock items, and the chart of accounts.

#### Task 2.6 Testing and Training

Consultant will provide a template Manual of Practices for the business unit and will coach the City Program Coordinator and Departmental Project Leader in customizing the manual for the business unit. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant.

- Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manual of Practices to test the software configuration.
- Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for “going live” with the new practices and tools.
- Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

#### Task 2.7 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the “go live” date.

Consultant will coach planner/schedulers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

#### Phase 2 Milestone

System-generated Weekly Work Backlog and Actual Cost Reports for the O.N. Stevens Treatment Plant, showing results of using the new practices and technology

### ***Phase 3. Wastewater Treatment Plants***

(ALL PHASE 3 TASKS WERE COMPLETED UNDER PROJECT 8380, FY 2001-02)

This phase introduces the work management practices and technology to Wastewater Treatment Plants.

#### Task 3.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Lead to identify the business unit’s planner/schedulers. Consultant will conduct a workshop with all planner/schedulers to introduce the work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation. Representatives from other business units will be invited to observe the workshop.

### Task 3.2 Data Collection

The City Program Coordinator and Departmental Project Lead will assemble a Data Collection Team of representatives from the business unit. This team will be responsible for the data collection effort, which will be coordinated by the Departmental Project Leader. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and data collection support. The City Business Unit Team will gather all location, asset, and problem data, and Consultant will review data and load it into the development and training databases.

### Task 3.3 Practices Modeling

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers and workers to refine the business unit's work/maintenance practices. Consultant will conduct a series of workshops with this team to capture current procedures for work/maintenance activities and reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structure. Representatives from other business units will be invited to observe the workshop.

### Task 3.4 Skills Inventory

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshop.

### Task 3.5 Software Configuration

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and job plan development support. The business unit team will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. The City System Administrator will load client software. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment.

#### Task 3.6 Testing and Training

Consultant will provide a template Manual of Practices for the business unit and will coach the City Program Coordinator and Departmental Project Leader in customizing the manual for the business unit. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant.

- Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manual of Practices to test the software configuration.
- Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for “going live” with the new practices and tools.
- Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

#### Task 3.7 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the “go live” date.

Consultant will coach planner/schedulers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

#### Phase 3 Milestone

System-generated Weekly Work Backlog and Actual Cost Reports for the Wastewater Treatment Plants, showing results of using the new practices and technology

### ***Phase 4. Water Distribution and Wastewater Collection***

(ALL PHASE 4 TASKS WERE COMPLETED UNDER PROJECT 8380, FY 2002-03)

This phase introduces the work management practices and technology to the Water Distribution Division and Wastewater Collection Division.

#### Task 4.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Lead to identify the business units’ planner/schedulers and call takers. Consultant will conduct a workshop with all planner/schedulers and call takers to introduce the work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation. Representatives from other business units will be invited to observe the workshop.

#### Task 4.2 Data Collection

Consultant will work with the City System Administrator and other City MIS personnel to link the GIS base map and the distribution and collection infrastructure from the GIS with the work management system and to establish procedures for data maintenance and coordination.

The City Program Coordinator and Departmental Project Lead will gather problem data, and Consultant will review the data and load it into the development and training databases.

#### Task 4.3 Practices Modeling

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers, call takers, and workers to refine the business units' work/maintenance practices. Consultant will conduct a series of workshops with this team to capture current procedures for work/maintenance activities and reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structure. Representatives from other business units will be invited to observe the workshop.

#### Task 4.4 Skills Inventory (THIS TASK WAS COMPLETED UNDER PROJECT 8380, FY 2001-02)

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshop.

#### Task 4.5 Software Configuration

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and job plan development support. The business unit team will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment. Consultant will obtain additional software as needed, and the City System Administrator will load client software.

Task 4.6 Testing and Training

Consultant will provide a template Manual of Practices for the business unit and will coach the City Program Coordinator and Departmental Project Leader in customizing the manual for the business unit. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manual of Practices to test the software configuration.

Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for “going live” with the new practices and tools. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

Task 4.7 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the “go live” date. Consultant will coach planner/schedulers, call takers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

Phase 4 Milestone

System-generated Weekly Work Backlog and Actual Cost Reports for the Distribution and Collection groups, showing results of using the new practices and technology

***Phase 4a. Process Analysis and Reinforcement of New Practices***

(ALL PHASE 4A TASKS WERE COMPLETED UNDER PROJECT 8380, FY 2002-03)

Consultant will consult with the City Program Coordinator and Departmental Project Leaders to identify any requirements for additional training and coaching or process analysis and refinement. If no such needs exist, this phase will be skipped.

Task 4a.1 Detailed Process Analysis and Reinforcement Plan

Consultant will work with the City Program Coordinator and Departmental Project Leaders to establish a detailed plan and schedule for analyzing and refining specific processes and for providing additional training and coaching to specific employees. Additional hardware and software needs will also be identified.

Task 4a.2 Process Analysis and Reinforcement

Consultant will provide additional process analysis, training, and coaching pursuant to the detailed plan. Consultant will also provide additional hardware and software if needed.

Phase 4a Milestone

Checklist of Completed Reinforcement Activities (Enumerated in Task 4a.1)

***Phase 5. Expand Technology Access***

(ALL PHASE 5 TASKS WERE COMPLETED UNDER PROJECT 8380, FY 2002-03)

This phase will provide additional software licenses to support upcoming phases.

Task 5.1 Install additional licenses

Consultant will provide additional software and will assist the System Administrator in installing these tools on various client machines.

Phase 5 Milestone

Additional Software Licenses Delivered

***Phase 6. Warehouse, Utility Billing, and PeopleSoft and HTE Interfaces***

(ALL PHASE 6 TASKS WILL BE COMPLETED UNDER PROJECT 8380, FY 2002-03)

This phase extends the work management program to the Utility Billing Office, provides interfaces to the customer information and financial systems, extends the program to the City Warehouse, and introduces parts reservation functions to the Water and Wastewater Utilities.

Task 6.1 Business Unit Team Alignment and Practices Modeling

Consultant will work with the City Program Coordinator and Departmental Project Leader to identify the business units' planner/schedulers, call takers, and warehouse personnel. Consultant will conduct workshops with planner/schedulers, call takers, and warehouse personnel to introduce the work and parts management concepts and standards. The Team will model current practices and reengineer them to support the City's work management vision. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation. Representatives from other business units will be invited to observe the workshop.

Task 6.2 Data Collection

The City Program Coordinator and Departmental Project Lead will gather problem data, and Consultant will review the data and load it into the development and training databases. If possible, the City System Administrator will provide a digital file of work histories from HTE, and Consultant will load these into the development and training environment.

Task 6.3 Skills Inventory for Utility Billing

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to

provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshop.

#### Task 6.4 Software Configuration

Consultant will work with the City Program Coordinator, System Administrator, and Departmental Project Leaders to define requirements for the Peoplesoft and HTE interfaces. Consultant will obtain or develop, install, and test these interfaces to Peoplesoft and HTE.

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers from Utility Billing to create standard job plans and programmed maintenance work orders. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and job plan development support. The business unit team will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress.

Consultant will enhance standard screens and reports as necessary to support City standards and the business units' specific performance criteria and work procedures. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment.

#### Task 6.5 Testing and Training

Consultant will provide a template Manual of Practices for the business units and will coach the City Program Coordinator and Departmental Project Leaders in customizing the manual for the business units. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant. Consultant will coach the City Program Coordinator in modifying the Water and Wastewater Manuals of Practices to reflect new business processes enabled by the interfaces. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manuals of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for “going live” with the new practices and tools, including the new business processes in the Water and Wastewater utilities as well as the Warehouse and Utility Billing. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

#### Task 6.6 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the “go live” date. Consultant will coach planner/schedulers, call takers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leaders in providing additional coaching and support.

#### Phase 6 Milestones

- System-generated Weekly Work Request, Work Backlog, and Actual Cost Reports for and Utility Billing, showing results of using the new practices and technology

- System-generated Inventory Status Report showing quantities reserved using new business practices

***Phase 7a. CQM (City Manager’s Office), Restaurant Inspections, and Fire Hydrants***

(ALL PHASE 7A TASKS WILL BE COMPLETED UNDER PROJECT 8380, FY 2002-03)

This phase extends the program to offices that support the Water and Wastewater utilities: CQM (City Manager’s Office) for call tracking, the restaurant inspection section of Health, and the hydrant maintenance group within the Fire Department.

**Task 7a.1 CQM Implementation**

Consultant will work with the City Program Coordinator and Departmental Project Leader to develop a Manual of Practices for CQM (City Manager’s Office) based on the call taking practices already developed and including an interim process for dealing with departments not yet using the City work management system. Consultant will work with the team to identify special reporting needs and will configure screens and reports as necessary. The City System Administrator will load client software, and Consultant and the City Program Coordinator will provide one-on-one training for CQM staff.

**Task 7a.2 Health Department Restaurant Inspection Implementation**

Consultant will work with the City Program Coordinator and Departmental Project Leader to develop a Manual of Practices and standard problem codes, job plans, and programmed maintenance rules for restaurant inspection. Consultant will work with the team to identify special reporting needs and will configure screens and reports as necessary. The City System Administrator will load client software, and Consultant and the City Program Coordinator will provide one-on-one training for restaurant inspection staff.

**Task 7a.3 Fire Department Hydrant Maintenance Implementation**

Consultant will work with the City Program Coordinator and Departmental Project Leader to develop a Manual of Practices and standard problem codes, job plans, and programmed maintenance rules for hydrant maintenance. Consultant will work with the team to identify special reporting needs and will configure screens and reports as necessary. The City System Administrator will load client software, and Consultant and the City Program Coordinator will provide one-on-one training for restaurant inspection staff.

**Phase 7a Milestones**

- System-generated Work Request Report for City Manager’s Office, showing results of using the new practices and technology
- System-generated Restaurant Inspection Work Backlog and Actual Cost Reports (for Health Department), showing results of using the new practices and technology
- System-generated Hydrant Maintenance Work Backlog and Actual Cost Reports (for Fire Department), showing results of using the new practices and technology

*Phase 7b. Solid Waste - Collection*

This phase extends the work management system to the Solid Waste Collection operations of the Solid Waste and Street Department. This phase will proceed in conjunction with Phase 13 – Streets.

Task 7b.1 Business Unit Team Alignment for Solid Waste - Collection

Consultant will work with the City Program Coordinator and Departmental Project Leader to identify the business unit's planner/schedulers and call takers. Consultant will conduct a workshop with all planner/schedulers and call takers to introduce the work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation. Representatives from other business units will be invited to observe the workshop.

Task 7b.2 Data Collection for Solid Waste - Collection

The City Program Coordinator and Departmental Project Leader will gather asset, location, and problem data, and Consultant will review the data and load it into the development and training databases.

Task 7b.3 Practices Alignment for Solid Waste - Collection

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers, call takers, and workers to refine the business unit's work/maintenance practices. Consultant will conduct a series of workshops with this team to reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structure. Representatives from other business units will be invited to observe the workshop.

Task 7b.4 Skills Inventory for Solid Waste (THIS TASK WAS COMPLETED UNDER PROJECT 8380, FY 2001-02)

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshop.

Task 7b.5 Software Configuration - Collection

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and job plan development support. The business unit team will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. The City System Administrator will load client software. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment.

Task 7b.6 Testing and Training for Solid Waste - Collection

Consultant will provide a template Manual of Practices for the business unit and will coach the City Program Coordinator and Departmental Project Leader in customizing the manual for the business unit. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manual of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for "going live" with the new practices and tools. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

Task 7b.7 Implementation and Coaching - Collection

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the "go live" date. Consultant will coach planner/schedulers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

Phase 7b Milestone

- System-generated Work Backlog and Actual Cost Reports for the Solid Waste Department Collection operation, showing results of using the new practices and technology

***Phase 13. Streets***

This phase introduces the work management practices and technology to the Streets Division of the Street and Solid Waste Department. This phase will proceed in conjunction with Phase 7b – Solid Waste Collection.

Task 13.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Leaders to identify the business unit's planner/schedulers, call takers, and workers. Consultant will conduct a workshop to introduce business unit personnel to the work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation. Representatives from other business units will be invited to observe the workshop.

#### Task 13.2 Data Collection

Consultant will work with the City System Administrator and other City MIS personnel to link any additional GIS street infrastructure with the work management system and to establish procedures for data maintenance and coordination. If possible, Consultant will also work with the City System Administrator to load work histories from the Department's existing work management systems. The City Program Coordinator and Departmental Project Leader will gather asset, location, and problem data, and Consultant will review the data and load it into the development and training databases.

#### Task 13.3 Practices Modeling

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers, call takers, and workers to refine the business unit's work/maintenance practices. Consultant will conduct a series of workshops with this team to capture current procedures for work/maintenance activities and reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structure. Representatives from other business units will be invited to observe the workshop.

#### Task 13.4 Skills Inventory Skills Inventory (THIS TASK WAS COMPLETED UNDER PROJECT 8380, FY 2001-02)

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshop.

#### Task 13.5 Software Configuration

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant and the City Program Coordinator will coach all team members. The business unit team will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment. Consultant will obtain additional software as needed, and the City System Administrator will load client software.

#### Task 13.6 Testing and Training

Consultant will provide a template Manual of Practices for the business unit and will coach the City Program Coordinator and Departmental Project Leader in customizing the manual for the business unit. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manual of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for “going live” with the new practices and tools. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

#### Task 13.7 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the “go live” date. Consultant will coach planner/schedulers, call takers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

#### Phase 13 Milestone

System-generated Weekly Work Backlog and Actual Cost Reports for the Streets Department, showing results of using the new practices and technology

### ***Phase 7c. Solid Waste - Landfill***

This phase extends the work management system to the Solid Waste Landfill operations of the Solid Waste Department.

#### Task 7c.1 Business Unit Team Alignment for Solid Waste - Landfill

Consultant will work with the City Program Coordinator and Departmental Project Leader to identify the business unit’s planner/schedulers. Consultant will conduct a workshop with all planner/schedulers and call takers to introduce the work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel.

#### Task 7c.2 Data Collection for Solid Waste - Landfill

The City Program Coordinator and Departmental Project Leader will gather asset, location, and problem data, and Consultant will review the data and load it into the development and training databases.

#### Task 7c.3 Practices Alignment for Solid Waste - Collection

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers, call takers, and workers to refine the business unit’s work/maintenance practices. Consultant will conduct a series of workshops with this team to reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices;

Consultant will consult with business unit leadership to finalize the refined organizational structure. Representatives from other business units will be invited to observe the workshop.

**Task 7c.4 Skills Inventory for Solid Waste (THIS TASK WAS COMPLETED UNDER PROJECT 8380, FY 2001-02)**

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshop.

**Task 7c.5 Software Configuration - Landfill**

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and job plan development support. The business unit team will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. The City System Administrator will load client software. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment.

**Task 7c.6 Testing and Training for Solid Waste - Landfill**

Consultant will provide a template Manual of Practices for the business unit and will coach the City Program Coordinator and Departmental Project Leader in customizing the manual for the business unit. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manual of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for "going live" with the new practices and tools. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

**Task 7c.7 Implementation and Coaching - Landfill**

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the "go live" date. Consultant will coach planner/schedulers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

Phase 7c Milestone

- System-generated Work Backlog and Actual Cost Reports for the Solid Waste Department Landfill operation, showing results of using the new practices and technology

*Phase 8. Stormwater*

(ALL PHASE 8 TASKS WERE COMPLETED UNDER PROJECT 8380, FY 2002-03)

This phase introduces the work management practices and technology to the Storm Water Department.

Task 8.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Lead to identify the business units' planner/schedulers and call takers. Consultant will conduct a workshop with all planner/schedulers and call takers to introduce the work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation. Representatives from other business units will be invited to observe the workshop.

Task 8.2 Data Collection

Consultant will work with the City System Administrator and other City MIS personnel to link the stormwater infrastructure from the GIS with the work management system and to establish procedures for data maintenance and coordination. The City Program Coordinator and Departmental Project Lead will gather asset, location, and problem data, and Consultant will review the data and load it into the development and training databases.

Task 8.3 Practices Modeling

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers, call takers, and workers to refine the business units' work/maintenance practices. Consultant will conduct a series of workshops with this team to capture current procedures for work/maintenance activities and reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structure. Representatives from other business units will be invited to observe the workshop.

Task 8.4 Skills Inventory (THIS TASK WAS COMPLETED UNDER PROJECT 8380, FY 2001-02)

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an

inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshop.

#### Task 8.5 Software Configuration

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and job plan development support. The business unit team will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment. Consultant will obtain additional software as needed, and the City System Administrator will load client software.

#### Task 8.6 Testing and Training

Consultant will provide a template Manual of Practices for the business unit and will coach the City Program Coordinator and Departmental Project Leader in customizing the manual for the business unit. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manual of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for "going live" with the new practices and tools. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

#### Task 8.7 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the "go live" date. Consultant will coach planner/schedulers, call takers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

#### Phase 8 Milestone

System-generated Weekly Work Backlog and Actual Cost Reports for the Storm Water Department, showing results of using the new practices and technology

#### ***Phase 8a. Process Analysis and Reinforcement of New Practices***

Consultant will consult with the City Program Coordinator and Departmental Project Leaders to identify any requirements for additional training and coaching or process analysis and refinement. Additional hardware and software needs will also be identified. If no such needs exist, this phase will be skipped.

Task 8a.1 Detailed Process Analysis and Reinforcement Plan

Consultant will work with the City Program Coordinator and Departmental Project Leaders to establish a detailed plan and schedule for analyzing and refining specific processes and for providing additional training and coaching to specific employees.

Task 8a.2 Process Analysis and Reinforcement

Consultant will provide additional process analysis, training, and coaching pursuant to the detailed plan. Consultant will also provide additional hardware and software if needed.

Phase 8a Milestone

Checklist of Completed Reinforcement Activities (Enumerated in Task 8a.1)

**Phase 9. Gas**

(ALL PHASE 9 TASKS WERE COMPLETED UNDER PROJECT 8380, FY 2002-03)

This phase introduces the work management practices and technology to the Gas Department.

Task 9.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Leader to identify the business units' planner/schedulers and call takers. Consultant will conduct a workshop with all planner/schedulers and call takers to introduce the work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation. Representatives from other business units will be invited to observe the workshop.

Task 9.2 Data Collection

Consultant will work with the City System Administrator and other City MIS personnel to link the gas infrastructure from the GIS with the work management system and to establish procedures for data maintenance and coordination. The City Program Coordinator and Departmental Project Lead will gather asset, location, and problem data, and Consultant will review the data and load it into the development and training databases.

Task 9.3 Practices Modeling

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers, call takers, and workers to refine the business units' work/maintenance practices. Consultant will conduct a series of workshops with this team to capture current procedures for work/maintenance activities and reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structure. Representatives from other business units will be invited to observe the workshop.

Task 9.4 Skills Inventory (THIS TASK WAS COMPLETED UNDER PROJECT 8380, FY 2001-02)

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshop.

Task 9.5 Software Configuration

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant will coach all team members and will assist the City Program Coordinator in providing additional coaching and job plan development support. The business unit team will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment. Consultant will obtain additional software as needed, and the City System Administrator will load client software.

Task 9.6 Testing and Training

Consultant will provide a template Manual of Practices for the business unit and will coach the City Program Coordinator and Departmental Project Leader in customizing the manual for the business unit. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manual of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for "going live" with the new practices and tools. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

Task 9.7 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the "go live" date. Consultant will coach planner/schedulers, call takers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

Phase 9 Milestone

System-generated Weekly Work Backlog and Actual Cost Reports for the Gas Department, showing results of using the new practices and technology

### *Phase 10. SCADA Integration and Field Unit Pilot*

This phase links the utility SCADA systems to the work management system to automatically trigger run-time based preventive maintenance. This phase also pilots the use of field PCs linked to the work management system.

#### Task 10.1 Water SCADA Interface

Consultant will build a link between the Water Utility's standard SCADA system and the work management system to provide runtime data for preventive maintenance. Consultant will test this link and will provide coaching to Water personnel on minor changes in business practices related to the new link. Consultant will work with the City System Administrator and SCADA support personnel to establish procedures for coordinating future SCADA upgrades or modifications.

#### Task 10.2 Wastewater SCADA Interface

Consultant will build a link between the Wastewater Utility's standard SCADA system and the work management system to provide runtime data for preventive maintenance. Consultant will test this link and will provide coaching to Water personnel on minor changes in business practices related to the new link. Consultant will work with the City System Administrator and SCADA support personnel to establish procedures for coordinating future SCADA upgrades or modifications.

#### Task 10.3 Gas SCADA Interface

Consultant will build a link between the Gas Utility's standard SCADA system and the work management system to provide runtime data for preventive maintenance. Consultant will test this link and will provide coaching to Water personnel on minor changes in business practices related to the new link. Consultant will work with the City System Administrator and SCADA support personnel to establish procedures for coordinating future SCADA upgrades or modifications.

#### Task 10.4 Field Unit Pilot

Consultant will work with the City Program Coordinator and various Departmental Project Leaders to identify candidates for the field unit pilot. Consultant will obtain a small number of field units and will conduct a workshop with pilot users to establish the new work management business processes supported by the field units. Consultant will modify the work management system as needed to support the field units, and the City Program Coordinator will make any necessary modifications to the affected Manuals of Practices. Consultant will work with City MIS staff to identify one or more data communication methods to use in the pilot. Consultant will conduct formal training for the pilot users and will coach these users in the field. Consultant will also assist the City Program Coordinator in providing additional coaching and support of the pilot users. Consultant will conduct a pilot closure workshop with all pilot users and technical staff to determine what modifications may be needed prior to broad field unit deployment.

#### Phase 10 Milestones

- Demonstration of Utility SCADA Systems Linked to the Work Management System
- Field Unit Pilot Closure Workshop Report, including list of any items to be addressed as part of the broad field unit deployment

***Phase 11. Broad Field Unit Deployment***

This phase extends the use of field units to all business units using the work management system.

Task 11.1 Field Unit Preparation

Consultant will modify the work management as needed based on the findings of the Phase 10 pilot and will work with the City Program Coordinator and various Departmental Project Leaders to identify the remaining field unit users. Consultant will obtain the remaining field units, and the City Program Coordinator will modify the Manuals of Practices as needed.

Task 11.2 Field Unit Deployment

Consultant will conduct formal training and will coach field unit users. The City Program Coordinator and pilot field unit users will also provide one-on-one coaching.

Phase 11 Milestone

System-generated Weekly Work Backlog and Actual Cost Reports, showing data created with the field unit practices and technology

***Phase 12a. Process Analysis and Reinforcement of New Practices***

Consultant will consult with the City Program Coordinator and Departmental Project Leaders to identify any requirements for additional training and coaching or process analysis and refinement. Additional hardware and software needs will also be identified. If no such needs exist, this phase will be skipped.

Task 12a.1 Detailed Process Analysis and Reinforcement Plan

Consultant will work with the City Program Coordinator and Departmental Project Leaders to establish a detailed plan and schedule for analyzing and refining specific processes and for providing additional training and coaching to specific employees.

Task 12a.2 Process Analysis and Reinforcement

Consultant will provide additional process analysis, training, and coaching pursuant to the detailed plan. Consultant will also provide additional hardware and software if needed.

Phase 12a Milestone

Checklist of Completed Reinforcement Activities (Enumerated in Task 12a.1)

***Scope Section 2. Citywide Extension***

After completing the implementation for Utilities and Public Works, the City will determine whether it wishes to extend the program to the remaining City departments. If the City proceeds with the Section 2 Citywide Extension, the City Program Coordinator will continue to administer the general communications plan and will work with the

remaining City departments to identify Department Project Leaders. The City Program Coordinator will administer the Section 2 phases in the same manner as the Section 1 phases.

### ***Phase 12b. Facilities Maintenance***

This phase extends the program to the Facilities Maintenance Department.

#### **Task 12b.1 Business Unit Team Alignment**

Consultant will work with the City Program Coordinator and Departmental Project Leaders to identify the business units' planner/schedulers, call takers, and workers. Consultant will conduct workshops to introduce business unit personnel to the work and asset management concepts and standards. The Teams will agree on business unit-specific performance measures and goals. The Teams will develop plans for communication with all business unit personnel.

#### **Task 12b.2 Data Collection**

The City Program Coordinator and Departmental Project Leaders will assemble Data Collection Teams of representatives from the business units. These teams will be responsible for the data collection effort, which will be coordinated by the Departmental Project Leaders. Consultant and the City Program Coordinator will coach all team members. The City Business Unit Teams will gather all location, asset, and problem data, and Consultant will review data and load it into the development and training databases. Consultant will also link additional GIS infrastructure to the work management system as needed.

#### **Task 12b.3 Practices Modeling**

The City Program Coordinator and Departmental Project Leaders will assemble teams of representative planner/schedulers, call takers, and workers to refine the business units' work/maintenance practices. Consultant will conduct a series of workshops with these teams to reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business units. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structures.

#### **Task 12b.4 Skills Inventory (THIS TASK WAS COMPLETED UNDER PROJECT 8380, FY 2001-02)**

Consultant will work with the City Program Coordinator, Departmental Project Leaders, and City Human Resources personnel to assemble preliminary lists of skills and certifications required to perform work within the business units. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leaders will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshops.

#### Task 12b.5 Software Configuration

The City Program Coordinator and Departmental Project Leaders will assemble teams of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant and the City Program Coordinator will coach team members. The business unit teams will develop all job plans and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business units' specific performance criteria and work procedures. The City System Administrator will load client software. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment.

#### Task 12b.6 Testing and Training

Consultant will provide a template Manual of Practices for the business units and will coach the City Program Coordinator and Departmental Project Leaders in customizing the manuals for the business units. The City Program Coordinator and Departmental Project Leaders will complete the manuals and review them with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manuals of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leaders in completing detailed schedules for formal training and plans and dates for "going live" with the new practices and tools in each business unit. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

#### Task 12b.7 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the "go live" date. Consultant will coach planner/schedulers, workers, call taker, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

#### Phase 12b Milestone

- System-generated Work Backlog and Actual Cost Reports for the Facilities Maintenance Department, showing results of using the new practices and technology

### ***Phase 12c. Park and Recreation***

This phase extends the program to the Park and Recreation Department.

#### Task 12c.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Leaders to identify the business units' planner/schedulers, call takers, and workers. Consultant will conduct workshops to introduce business unit personnel to the work and asset management concepts and standards. The Teams will agree on business unit-specific performance measures and goals. The Teams will develop plans for communication with all business unit personnel.

#### Task 12c.2 Data Collection

The City Program Coordinator and Departmental Project Leaders will assemble Data Collection Teams of representatives from the business units. These teams will be responsible for the data collection effort, which will be coordinated by the Departmental Project Leaders. Consultant and the City Program Coordinator will coach all team members. The City Business Unit Teams will gather all location, asset, and problem data, and Consultant will review data and load it into the development and training databases. Consultant will also link additional GIS infrastructure to the work management system as needed.

#### Task 12c.3 Practices Modeling

The City Program Coordinator and Departmental Project Leaders will assemble teams of representative planner/schedulers, call takers, and workers to refine the business units' work/maintenance practices. Consultant will conduct a series of workshops with these teams to reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business units. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structures. Representatives from other business units will be invited to observe the workshops.

#### Task 12c.4 Skills Inventory (THIS TASK WAS COMPLETED UNDER PROJECT 8380, FY 2001-02)

Consultant will work with the City Program Coordinator, Departmental Project Leaders, and City Human Resources personnel to assemble preliminary lists of skills and certifications required to perform work within the business units. Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leaders will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study. Representatives from other business units will be invited to observe the workshops.

#### Task 12c.5 Software Configuration

The City Program Coordinator and Departmental Project Leaders will assemble teams of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant and the City Program Coordinator will coach team members. The business unit teams will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business units' specific performance criteria and work procedures. The City System Administrator will load client software. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment.

#### Task 12c.6 Testing and Training

Consultant will provide a template Manual of Practices for the business units and will coach the City Program Coordinator and Departmental Project Leaders in customizing the manuals for the business units. The City Program Coordinator and Departmental Project Leaders will complete the manuals and review

them with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manuals of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leaders in completing detailed schedules for formal training and plans and dates for “going live” with the new practices and tools in each business unit. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

#### Task 12c.7 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the “go live” date. Consultant will coach planner/schedulers, workers, call taker, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

#### Phase 12c Milestone

- System-generated Work Backlog and Actual Cost Reports for the Park and Recreation Department, showing results of using the new practices and technology

### ***Phase 12d. Health***

This phase extends the remainder of the Health Department (other than restaurant inspections).

#### Task 12d.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Leaders to identify the business units’ planner/schedulers, call takers, and workers. Consultant will conduct workshops to introduce business unit personnel to the work and asset management concepts and standards. The Teams will agree on business unit-specific performance measures and goals. The Teams will develop plans for communication with all business unit personnel.

#### Task 12d.2 Data Collection

The City Program Coordinator and Departmental Project Leaders will assemble Data Collection Teams of representatives from the business units. These teams will be responsible for the data collection effort, which will be coordinated by the Departmental Project Leaders. Consultant and the City Program Coordinator will coach all team members. The City Business Unit Teams will gather all location, asset, and problem data, and Consultant will review data and load it into the development and training databases. Consultant will also link additional GIS infrastructure to the work management system as needed.

#### Task 12d.3 Practices Modeling

The City Program Coordinator and Departmental Project Leaders will assemble teams of representative planner/schedulers, call takers, and workers to refine the business units’ work/maintenance practices. Consultant will conduct a series of workshops with these teams to reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business units. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structures. Representatives from other business units will be invited to observe the workshops.

## Task 12d.4 Software Configuration

The City Program Coordinator and Departmental Project Leaders will assemble teams of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant and the City Program Coordinator will coach team members. The business unit teams will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business units' specific performance criteria and work procedures. The City System Administrator will load client software. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment.

## Task 12d.5 Testing and Training

Consultant will provide a template Manual of Practices for the business units and will coach the City Program Coordinator and Departmental Project Leaders in customizing the manuals for the business units. The City Program Coordinator and Departmental Project Leaders will complete the manuals and review them with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manuals of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leaders in completing detailed schedules for formal training and plans and dates for “going live” with the new practices and tools in each business unit. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

## Task 12d.6 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the “go live” date. Consultant will coach planner/schedulers, workers, call taker, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

## Phase 12d Milestone

- System-generated Work Backlog and Actual Cost Reports for the Health Department, showing results of using the new practices and technology

*Phase 14a. Airport – Software Only*

(ALL PHASE 14a TASKS WERE COMPLETED UNDER PROJECT 8380, FY 2002-03)

This phase introduces the work management technology to the Airport.

## Task 14a.1 (formerly 14.2) Data Collection

Consultant will work with the City System Administrator to load work histories from the Department's existing work management system. The City Program Coordinator and Departmental Project Leader will

gather asset, location, and problem data, and Consultant will review the data and load it into the development and training databases.

#### Task 14a.2 (formerly 14.5) Software Configuration

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant and the City Program Coordinator will coach all team members. The business unit team will develop all job plans and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment. Consultant will obtain additional software as needed, and the City System Administrator will load client software.

#### Phase 14a Milestone

System-generated Work Backlog and Actual Cost Reports for the Airport

### ***Phase 14b. Airport Reengineering***

This phase introduces the work management practices and organizational alignment to the Airport.

#### Task 14a.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Leaders to identify the business unit's planner/schedulers, call takers, and workers. Consultant will conduct a workshop to introduce business unit personnel to the work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation.

#### Task 14a.2 Practices Modeling

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers, call takers, and workers to refine the business unit's work/maintenance practices. Consultant will conduct a series of workshops with this team to capture current procedures for work/maintenance activities and reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Another outcome may be modifications to organizational reporting rules or structures to better support the new work practices; Consultant will consult with business unit leadership to finalize the refined organizational structure. Representatives from other business units will be invited to observe the workshop.

#### Task 14a.3 Skills Inventory

Consultant will work with the City Program Coordinator, Departmental Project Leader, and City Human Resources personnel to assemble a preliminary list of skills and certifications required to perform work within the business unit. Consultant will conduct a workshop with business unit representatives to refine

this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Consultant will coordinate with Human Resources personnel to provide a list of skills for incorporation in the ongoing classification and compensation study.

#### Task 14a.4 Testing and Training

Consultant will provide a template Manual of Practices for the business unit and will coach the City Program Coordinator and Departmental Project Leader in customizing the manual for the business unit. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manual of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for “going live” with the new practices (including extension of work management technology). Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

#### Task 14a.5 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the “go live” date. Consultant will coach planner/schedulers, call takers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

#### Phase 14a Milestone

System-generated Work Backlog and Actual Cost Reports for the Airport, showing results of using the new maintenance practices

### ***Phase 15. Police and Fire***

This phase introduces the work management practices and technology to the Police Department and the remainder of the Fire Department

#### Task 15.1 Business Unit Team Alignment

Consultant will work with the City Program Coordinator and Departmental Project Leaders to identify the business units’ non-emergency planner/schedulers, call takers, and workers. Consultant will conduct a workshop to introduce business unit personnel to non-emergency work and asset management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Team will develop a plan for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation. Representatives from other business units will be invited to observe the workshop.

#### Task 15.2 Data Collection

The City Program Coordinator and Departmental Project Leaders will gather asset and problem data, and Consultant will review the data and load it into the development and training databases.

### Task 15.3 Practices Modeling

The City Program Coordinator and Departmental Project Leader will assemble a team of representative planner/schedulers, call takers, and workers to refine the business units' non-emergency work/maintenance practices. Consultant will conduct a series of workshops with this team to capture current procedures for work/maintenance activities and reengineer these practices to be consistent with the City work management vision. Among the outcomes of the workshops will be a preliminary list of all programmed and routine reactive work performed within the business unit. Representatives from other business units will be invited to observe the workshop.

### Task 15.4 Skills Inventory

Consultant will work with the City Program Coordinator, Departmental Project Leaders, and City Human Resources personnel to determine whether there are any skills or certifications required to perform non-emergency work within the business units. If so, Consultant will conduct a workshop with business unit representatives to refine this list, and Consultant will prepare a skills inventory form to be completed by business unit employees. The skills information will be used in system configuration and also to identify longer term training requirements. The City Program Coordinator and Departmental Project Leader will ensure that an inventory is completed for each employee. Representatives from other business units will be invited to observe the workshop.

### Task 15.5 Software Configuration

The City Program Coordinator and Departmental Project Leaders will assemble teams of representative planner/schedulers to create standard job plans and programmed maintenance work orders. Consultant and the City Program Coordinator will coach all team members. The business unit teams will develop all safety plans, job plans, and preventive maintenance rules, and Consultant will review the results and monitor progress. Consultant will enhance standard screens and reports as necessary to support City standards and the business unit's specific performance criteria and work procedures. Consultant will assist the System Administrator in identifying business unit users and setting up accounts for the production environment. Consultant will obtain additional software as needed, and the City System Administrator will load client software.

### Task 15.6 Testing and Training

Consultant will provide a template Manual of Practices for the business units and will coach the City Program Coordinator and Departmental Project Leaders in customizing the manuals for the business units. The City Program Coordinator and Departmental Project Leader will complete the manual and review it with Consultant. Consultant, the City Program Coordinator, Departmental Project Leader, and System Administrator will use the Manuals of Practices to test the software configuration. Consultant will assist the City Program Coordinator and Departmental Project Leader in completing a detailed schedule for formal training and a plan and date for "going live" with the new practices and tools. Consultant will conduct formal classes with business unit personnel to present the new tools and practices.

### Task 15.7 Implementation and Coaching

Consultant will assist the City System Administrator in setting up the production database environment. Consultant will load and test the production database prior to the "go live" date. Consultant will coach

planner/schedulers, call takers, workers, and managers in the new tools and practices and will assist the City Program Coordinator and Departmental Project Leader in providing additional coaching and support.

#### Phase 15 Milestones

- System-generated Weekly Non-emergency Work Backlog and Actual Cost Reports for the Police Department, showing results of using the new practices and technology
- System-generated Weekly Non-emergency Work Backlog and Actual Cost Reports for the Fire Department, showing results of using the new practices and technology

#### ***Phase 16. Extension of Field Unit Program***

This phase extends the use of field units to all City business units using the work management system.

##### Task 16.1 Field Unit Preparation

Consultant will work with the City Program Coordinator and various Departmental Project Leaders to identify the remaining field unit users. Consultant will obtain the remaining field units, and the City Program Coordinator will modify the Manuals of Practices as needed.

##### Task 16.2 Field Unit Deployment

Consultant will conduct formal training and will coach field unit users. The City Program Coordinator will also provide one-on-one coaching.

#### Phase 16 Milestone

System-generated Weekly Work Backlog and Actual Cost Reports, showing data created with new field practices and technology in the non-utility departments that have been reengineered

#### ***Phase 16a. Process Analysis and Reinforcement of New Practices***

Consultant will consult with the City Program Coordinator and Departmental Project Leaders to identify any requirements for additional training and coaching or process analysis and refinement. Additional hardware and software needs will also be identified. If no such needs exist, this phase will be skipped.

##### Task 16a.1 Detailed Process Analysis and Reinforcement Plan

Consultant will work with the City Program Coordinator and Departmental Project Leaders to establish a detailed plan and schedule for analyzing and refining specific processes and for providing additional training and coaching to specific employees.

##### Task 16a.2 Process Analysis and Reinforcement

Consultant will provide additional process analysis, training, and coaching pursuant to the detailed plan. Consultant will also provide additional hardware and software if needed.

Phase 16a Milestone

Checklist of Completed Reinforcement Activities (Enumerated in Task 16a.1)

***Phase 17. Housing and Community Development, Museum, Library, Convention Center, MIS, Planning, and Fleet Interface***

This phase extends the program a variety of City departments and establishes an interface to the fleet management system to coordinate the preventive and corrective work orders in the two systems.

Task 17.1 Housing and Community Development

Consultant will work with the City Program Coordinator and Departmental Project Leaders to identify the business unit's planner/schedulers, call takers, and workers. Consultant will conduct workshops to introduce business unit personnel to the work management concepts and standards. The Team will agree on business unit-specific performance measures and goals. The Teams will develop plans for communication with all business unit personnel. Consultant will document the communication action plan and responsibilities and will refine the detailed schedule for business unit implementation. Consultant will conduct a workshop for the Team to model existing business practices and reengineer them to support the City's work management vision. The City Program Coordinator will work with the Departmental Project Leader to gather all asset and problem data, develop job plans and preventive maintenance rules, and produce a Manual of Practices. Consultant will load data into the work management system and make any modifications needed to support the business unit's performance measures or business practices. Consultant will work with the City Program Coordinator and Departmental Project Leader to test the system using the Manual of Practices and to develop a detailed schedule for training and implementation. The City System Administrator will load any software needed, and Consultant will conduct formal classes. The City Program Coordinator, with assistance from Consultant, will coach the call takers, planner/schedulers, and workers in the business unit.

Task 17.2 Museum

Consultant will work with the City Program Coordinator and Departmental Project Leader to establish business unit-specific performance measures and goals, model existing business practices, and reengineer them to support the City's work management vision. The City Program Coordinator will work with the Departmental Project Leader to gather all asset and problem data, develop job plans and preventive maintenance rules, and produce a Manual of Practices. Consultant will load data into the work management system and make any modifications needed to support the business unit's performance measures or business practices. Consultant will work with the City Program Coordinator and Departmental Project Leader to test the system using the Manual of Practices and to develop a detailed schedule for training and implementation. The City System Administrator will load any software needed, and Consultant will conduct formal classes. The City Program Coordinator, with assistance from Consultant, will coach the call takers, planner/schedulers, and workers in the business unit.

Task 17.3 Library

Consultant will work with the City Program Coordinator and Departmental Project Leader to establish business unit-specific performance measures and goals, model existing business practices, and reengineer them to support the City's work management vision. The City Program Coordinator will work with the

Departmental Project Leader to gather all asset and problem data, develop job plans and preventive maintenance rules, and produce a Manual of Practices. Consultant will load data into the work management system and make any modifications needed to support the business unit's performance measures or business practices. Consultant will work with the City Program Coordinator and Departmental Project Leader to test the system using the Manual of Practices and to develop a detailed schedule for training and implementation. The City System Administrator will load any software needed, and Consultant will conduct formal classes. The City Program Coordinator, with assistance from Consultant, will coach the call takers, planner/schedulers, and workers in the business unit.

**Task 17.4 Convention Center**

Consultant will work with the City Program Coordinator and Departmental Project Leader to establish business unit-specific performance measures and goals, model existing business practices, and reengineer them to support the City's work management vision. The City Program Coordinator will work with the Departmental Project Leader to gather all asset and problem data, develop job plans and preventive maintenance rules, and produce a Manual of Practices. Consultant will load data into the work management system and make any modifications needed to support the business unit's performance measures or business practices. Consultant will work with the City Program Coordinator and Departmental Project Leader to test the system using the Manual of Practices and to develop a detailed schedule for training and implementation. The City System Administrator will load any software needed, and Consultant will conduct formal classes. The City Program Coordinator, with assistance from Consultant, will coach the call takers, planner/schedulers, and workers in the business unit.

**Task 17.5 MIS**

Consultant will work with the City Program Coordinator and Departmental Project Leader to establish business unit-specific performance measures and goals, model existing business practices, and reengineer them to support the City's work management vision. The City Program Coordinator will work with the Departmental Project Leader to gather all asset and problem data, develop job plans and preventive maintenance rules, and produce a Manual of Practices. Consultant will load data into the work management system and make any modifications needed to support the business unit's performance measures or business practices. Consultant will work with the City Program Coordinator and Departmental Project Leader to test the system using the Manual of Practices and to develop a detailed schedule for training and implementation. The City System Administrator will load any software needed, and Consultant will conduct formal classes. The City Program Coordinator, with assistance from Consultant, will coach the call takers, planner/schedulers, and workers in the business unit.

**Task 17.6 Planning and Other City Departments**

Consultant will work with the City Program Coordinator to identify any program needs in the Planning Department or other City Departments. Consultant will coach the City Program Coordinator and System Administrator in working with up to three of these groups or individuals to establish performance measures, reengineer business practices, collect data, and implement the work management program.

**Task 17.7 Fleet Interface**

Consultant will work with the City Program Coordinator, Departmental Project Leaders, and City System Administrator to identify functional and technical requirements for the fleet interface. Consultant will

develop this interface, and the City Program Coordinator will make any necessary adjustments to departmental Manuals of Practices. Consultant will test the interface and conduct formal training on the changes in business practices associated with the new interface. Consultant and the City Program Coordinator will coach City personnel on the new business practices.

#### Phase 17 Milestones

- System-generated Weekly Work Backlog and Actual Cost Reports for the Housing and Community; Development Department, showing results of using the new practices and technology;
- System-generated Weekly Work Backlog and Actual Cost Reports for the Museum, showing results of using the new practices and technology;
- System-generated Weekly Work Backlog and Actual Cost Reports for the Libraries, showing results of using the new practices and technology;
- System-generated Weekly Work Backlog and Actual Cost Reports for the Convention Center, showing results of using the new practices and technology;
- System-generated Weekly Work Backlog and Actual Cost Reports for the MIS Department, showing results of using the new practices and technology;
- System-generated Weekly Work Backlog and Actual Cost Reports for the Planning Department, showing results of using the new practices and technology; and
- System-generated Weekly Work Backlog Report, showing results of link to fleet maintenance system.

#### *Phase 18a. Customer Service Call Center Procedures and Start-up*

This phase of the project extends the work management program to a City-wide customer service call center and provides general consulting support for the call center, consistent with the vision and strategies in the City's Master Plan for Citywide Customer Service Program (October, 2002).

##### Task 18a.1 Call Management Procedures and Training Requirements

Consultant will work with the City's Customer Service Call Center Manager to analyze and refine standard operating procedures for call management and for creating work requests for all departments, including those not yet using the work management system. Consultant will assist the City's Customer Service Call Center Manager to analyze and refine training requirements for Call Center staff.

##### Task 18a.2 Software Configuration and Reports

Consultant will work with the City's Customer Service Call Center Manager and departmental representatives to identify customer service performance measures and reports that can be generated from the work management system. Consultant will modify the system as necessary and assist the City's System Administrator in developing the reports.

### Task 18a.3 Implementation Support

Consultant will assist the City's Work Management Program Coordinator, Work Management System Administrator, and Customer Service Call Center Manager to train and coach call center staff in use of the work management system for call management.

#### Phase 18.a Milestone

- System-generated Work Management Reports showing status of work generated by the call center

### ***Phase 18b. Customer Service Call Center Work Management Roll-out***

This phase of the project modifies departmental work management procedures to provide for centralized call handling (at the Customer Service Call Center). It provides ongoing coaching and process reinforcement for the Call Center staff.

#### Task 18b.1 Departmental Work Management Procedures

Consultant will work with the City's Work Management Program Coordinator, departmental leadership, Work Coordinators, and dispatchers to refine practices to accommodate centralized call management. Consultant will facilitate work sessions between departmental representatives and the City's Customer Service Call Center Manager to identify opportunities for improving call center procedures.

#### Task 18b.2 Organizational Support

Consultant will work with the City Work Management Program Coordinator and Customer Service Call Center Manager to establish permanent teams and procedures for (1) balancing customer service with work management effectiveness and efficiency, and (2) ensuring clear communication between the call center and the departments served. Consultant will assist the City System Administrator, City Work Management Program Coordinator, and Customer Service Call Center Manager to refine call center practices and reports and provide additional coaching to call center staff.

#### Phase 18.b Milestone

- Action plan for permanent team and procedures to balance customer service and departmental work management requirements

### ***Scope for FY 2002-2003***

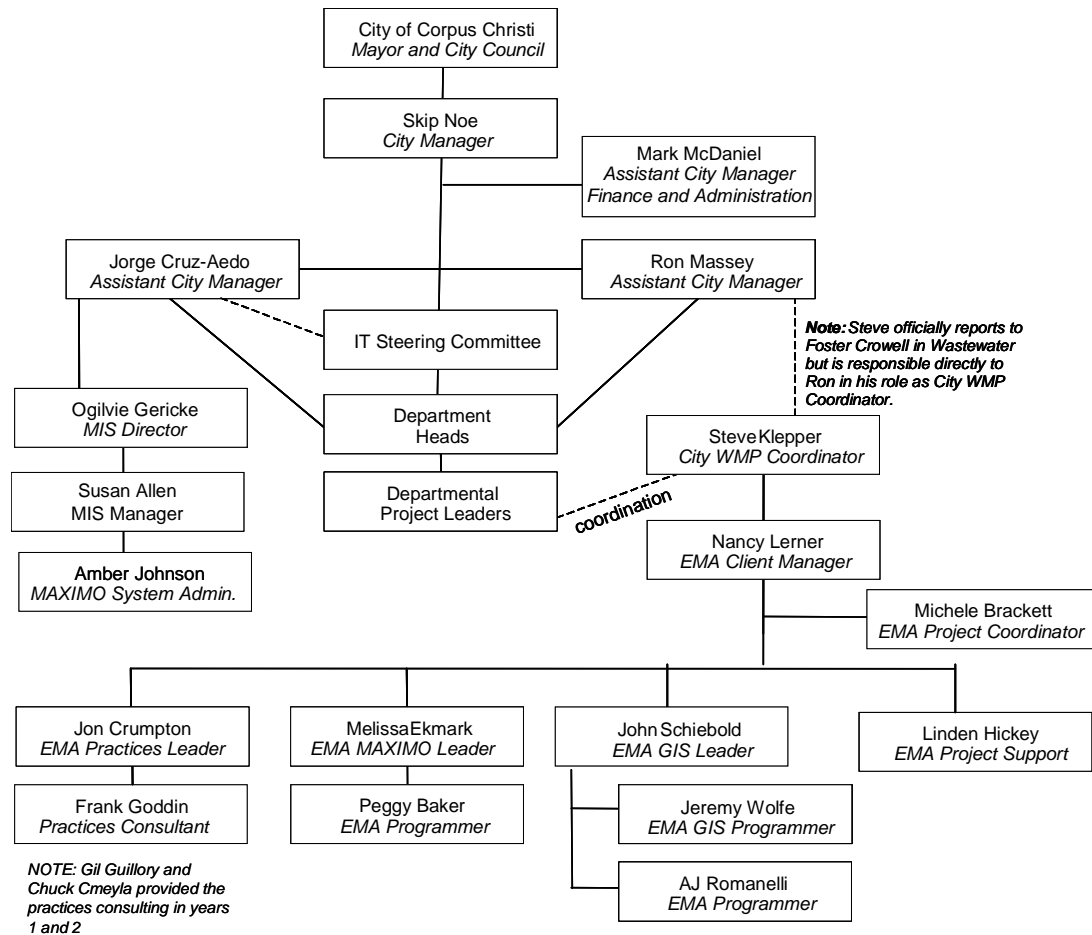
The scope anticipated for FY 2003-2004 includes the following phases and tasks:

Phase 7b: Solid Waste – Collection	\$80,000
Phase 8a. Process Analysis and Reinforcement	\$200,000
Phase 10: SCADA Integration and Field Unit Pilot	\$200,000
Phase 12a. Process Analysis and Reinforcement	\$200,000
Phase 12b: Facilities Maintenance (Except Task 12b.4)	\$47,500
Phase 12c: Park and Recreation (Except Task 12.4)	\$100,000

Phase 13: Streets (Except Task 13.4)	\$187,500
Phase 18a: Call Center Procedures and Start-up	\$75,000
<b>FY 2003-04 Fees</b>	<b>\$1,090,000</b>

## Project Team

The following organization chart depicts the Project Team.



The Departmental Project Leaders are listed in the following table. Only those phases that require Departmental Project Leaders are listed.

Phase	Business Unit	Leader(s)
2	Water Supply and Production	Sandra Thaxton
3	Wastewater Treatment	Johnny Perales
4	Water Distribution	Sandra Thaxton
4	Wastewater Collection	Johnny Perales
6	Warehouse (see note on page 4)	Tony Fernicola
6	Utility Billing	Michelle Workman
7	City Manager's Office Staff	Annie Leal

<b>Phase</b>	<b>Business Unit</b>	<b>Leader(s)</b>
7	Health (Restaurant Inspections)	Larry Jones
7	Fire (Hydrant Inspections)	Mike Hernandez
7	Solid Waste	Lawrence Mikolajczyk
8	Stormwater	Aurora Parlamas
9	Gas	David Flores
12	Facilities Maintenance	Rick Phillipson
12	Park and Recreation	Chris Semtner
12	Health	Larry Jones
13	Streets	Andy Leal
14	Airport	TBD
15	Police	Leonard Scott
15	Fire	Mike Hernandez
17	Housing and Community Dev.	TBD
17	Museum	Bonnie Lisowskil
17	Library	TBD
17	Convention Center	Larry Stoneceioher
17	Municipal Information Systems	Ogilvie Gericke
17	Planning	TBD
17	Fleet (for interface)	Rick Phillipson
18	Call Center	Annie Leal

#### Lines of Communications

All official correspondence is between the two project managers (Nancy Lerner and Steve Klepper). Project team members receive detailed work instructions from their track leaders (see org chart).

## Detailed Schedule of Remaining Meetings (Subject to Revision)

<b>Meeting/Workshop</b>	<b>Suggested Location</b>	<b>Date</b>	<b>Start</b>	<b>Finish</b>	<b>City Attendees</b>	<b>EMA Lead (Agenda Manager)</b>
Technical Review - Street and Solid Waste Legacy System Migration - finalize plans	Water Admin Computer Training Room	4/5/04	8:00 AM	12:00 PM	Street and Solid Waste Technical Staff	Melissa
Coordination with AMR Project	Leonard Scott's Office	4/5/04	1:00 PM	2:00 PM	Leonard Scott	Melissa
Touch base on IT readiness and user accounts for Streets, Solid Waste, UBO, Park and Rec, and Facility Maintenance	Telephone Discussion	4/7/04	8:00 AM	9:00 AM	Steve	Michele
Plan asset hierarchy strategy for buildings	Water Admin Computer Training Room	4/8/04	8:00 AM	12:00 PM	Amber and Steve and Rick P	Melissa, Nancy
Plan legacy system migration for Park and Rec	Park and Rec Conference Room	4/8/04	1:00 PM	5:00 PM	Park and Rec Technical Staff	Melissa
Plan legacy system migration for Facility Maintenance	Facility Maintenance Office (Rick's Office?)	4/9/04	8:00 AM	12:00 PM	Facility Maintenance Leadership and Technical Staff	Melissa
Manual of Practices (MOP) Workshop - Work order life cycle overview; Standard codes (Appendix A); Work Initiation Workflow and MAXGIS Screen Overview; Work Order Life Cycle Workflows and MAXIMO Screen Overview	Water Admin Computer Training Room	4/13/04	8:00 AM	5:00 PM	Park, Facility Maintenance, and Solid Waste P/S and Coordinator Candidates	Jon
Core concepts workshop (job plans, PMs, p/s role)	Water Admin Computer Training Room	4/14/04	8:00 AM	12:00 PM	Park, Facility Maintenance, and Solid Waste P/S and Coordinator	Jon

Meeting/Workshop	Suggested Location	Date	Start	Finish	City Attendees	EMA Lead (Agenda Manager)
					Candidates	
Coach Park and Facility job plan developers	Water Admin Computer Training Room	4/14/04	1:00 PM	5:00 PM	Park and Facility Maintenance P/S Candidates	Jon
Coach Solid Waste job plan developers	Water Admin Computer Training Room	4/15/04	8:00 AM	12:00 PM	Solid Waste, Park and Facility Maintenance P/S Candidates	Jon
Touch base with Gas on work flow and status of planning and scheduling	Gas Department	4/15/04	1:00 PM	5:00 PM	Dade and Ricardo	Jon
Review Streets asset data, customer/problem codes, job plans, and PMs	Water Admin Large Conference Room	4/16/04	8:00 AM	12:00 PM	Street P/S and Coordinator Candidates and Amber	Jon
Walk through software in test with Call Center (Annie and Susan)	Water Admin Computer Training Room	4/29/04	8:00 AM	11:30 AM	Call Center Group 1	Melissa, Nancy
Finalize work processes with Street P/S, Coordinators, and Dispatchers (software walk-through in test; reactive flows in morning)	Water Admin Computer Training Room	5/4/04	8:00 AM	5:00 PM	Street P/S (all day), Coordinators and Disptachers (morning)	Jon
Finalize planned work processes with Street P/S (continued)	Water Admin Computer Training Room	5/5/04	8:00 AM	5:00 PM	Street P/S and Coordinator Candidates	Jon
PF - Asset data workshop - asset types, asset hierarchy guidelines, and MAXIMO specs	Water Admin Computer Training Room	5/5/04	1:00 PM	5:00 PM	Park and Facility Maintenance P/S and Coordinator Candidates	Melissa
Document Park and Facility Maintenance customer report and asset	Water Admin Computer Training Room	5/6/04	8:00 AM	12:00 PM	Park and Facility Maintenance P/S and Coordinator	Jon

<b>Meeting/Workshop</b>	<b>Suggested Location</b>	<b>Date</b>	<b>Start</b>	<b>Finish</b>	<b>City Attendees</b>	<b>EMA Lead (Agenda Manager)</b>
failure codes					Candidates	
Review job plans; coach PM creation	Water Admin Computer Training Room	5/6/04	1:00 PM	5:00 PM	Park, Facility Maintenance, and Solid Waste P/S and Coordinator Candidates	Jon
Utility technology touch-base	Water Admin Large Conference Room	5/7/04	8:00 AM	12:00 PM	Utilities	Melissa
Review processes, screens and reports (walkthrough)	Water Admin Computer Training Room	5/18/04	8:00 AM	3:00 PM	Call Center	Melissa
Call Center Growth Plan Review	Call Center Office (City Hall Conference Room?)	5/18/04	3:00 PM	5:00 PM	Call Center	Nancy
Special Response Training for Utility and Streets P/S and Leaders	Water Admin Computer Training Room	5/24/04	1:00 PM	5:00 PM	Utility and Streets Leaders and P/S	Jon
Final Software Review for Streets P/S and Coordinators	Water Admin Computer Training Room	5/25/04	8:00 AM	5:00 PM	UBO and Field Ops Street P/S and Coordinator Candidates	Jon
Train Streets Call Takers/Dispatchers	Water Admin Computer Training Room	5/26/04	8:00 AM	5:00 PM	UBO and Streets Call Takers/Dispatcher s	Jon
Train (practices and technology for contact creation, inquiries, transfers, work status review, complaints/advocacy)	City Hall Basement Computer Training Room?	5/26/04	8:00 AM	5:00 PM	Call Center	Melissa

<b>Meeting/Workshop</b>	<b>Suggested Location</b>	<b>Date</b>	<b>Start</b>	<b>Finish</b>	<b>City Attendees</b>	<b>EMA Lead (Agenda Manager)</b>
Train (practices and technology for contact creation, inquiries, transfers, work status review, special response) - Drills	City Hall Basement Computer Training Room?	5/27/04	8:00 AM	5:00 PM	Call Center	Melissa
Train Streets Call Takers/Dispatchers - Drills	Water Admin Computer Training Room	5/27/04	8:00 AM	12:00 PM	UBO and Streets Call Takers/Dispatcher s	Jon
(Refresher) Transfers Training for Utility Dispatchers	Water Admin Computer Training Room	5/27/04	1:00 PM	5:00 PM	Streets Team Leaders (Data Entry)	Jon
Train Streets Team Leaders (Data Entry) - Group 1	Water Admin Computer Training Room	5/28/04	8:00 AM	11:00 AM	Streets Team Leaders (Data Entry)	Jon
Train Streets Team Leaders (Data Entry) - Group 2	Water Admin Computer Training Room	5/28/04	12:00 PM	3:00 PM	Streets Team Leaders (Data Entry)	Jon
<b>Go Live for Streets and Call Center</b>		<b>6/1/04</b>	<b>8:00 AM</b>	<b>5:00 PM</b>		
Review job plans and asset hierarchy; coach PM creation	Water Admin Computer Training Room	6/3/04	8:00 AM	5:00 PM	Park and Facility Maintenance P/S and Coordinator Candidates	Jon
Train/coach for FAQ maintenance (update FAQs)	Annie's or Alicia's Office?	6/14/04	8:00 AM	5:00 PM	Call Center	Michele
Workshop - introduce materials management/refine processes	Water Admin Computer Training Room	6/15/04	8:00 AM	5:00 PM	"Live" P/S	Michele
Finalize legacy system plans and asset hierarchy	Water Admin Computer Training Room	6/18/04	8:00 AM	5:00 PM	Park and Facility Maintenance P/S and Coordinator Candidates	Melissa, Jon

<b>Meeting/Workshop</b>	<b>Suggested Location</b>	<b>Date</b>	<b>Start</b>	<b>Finish</b>	<b>City Attendees</b>	<b>EMA Lead (Agenda Manager)</b>
Review asset data, customer/problem codes, job plans, and PMs	Water Admin Computer Training Room	6/28/04	8:00 AM	5:00 PM	Park and Facility Maintenance P/S and Coordinator Candidates	Jon
SCADA Integration Design Workshop	Water Admin Computer Training Room	6/28/04	8:00 AM	5:00 PM	Amber, Susan, Davids, Burt, John, Bob	Melissa
Finalize organizational plans; touch base on IT readiness and user accounts	Park and Rec Conference Room	6/29/04	8:00 AM	12:00 PM	Park and Rec Leadership	Nancy, Michele
Finalize organizational plans; touch base on IT readiness and user accounts	Facility Maintenance Office (Rick's Office?)	6/29/04	1:00 PM	5:00 PM	Facility Maintenance Leadership	Nancy, Michele
Utility process analysis and PM coaching	Gas Department	6/29/04	8:00 AM	12:00 PM	Gas	Jon
Utility process analysis and PM coaching	Water Admin Computer Training Room	6/29/04	1:00 PM	5:00 PM	Storm	Jon
Utility process analysis and PM coaching	Water Admin Computer Training Room	6/30/04	8:00 AM	12:00 PM	Collection	Jon
Utility process analysis and PM coaching	Water Admin Computer Training Room	6/30/04	1:00 PM	5:00 PM	Distribution	Jon
Utility process analysis and PM coaching	Water Admin Computer Training Room	7/1/04	8:00 AM	12:00 PM	Wastewater Treatment	Jon
Utility process analysis and PM coaching	ON Stevens	7/1/04	1:00 PM	5:00 PM	Water Production (Plant and Dams)	Jon
Process analysis and refinement; plan for first department for work order creation	Call Center Office (City Hall Conference Room?)	7/6/04	8:00 AM	5:00 PM	Call Center	Nancy

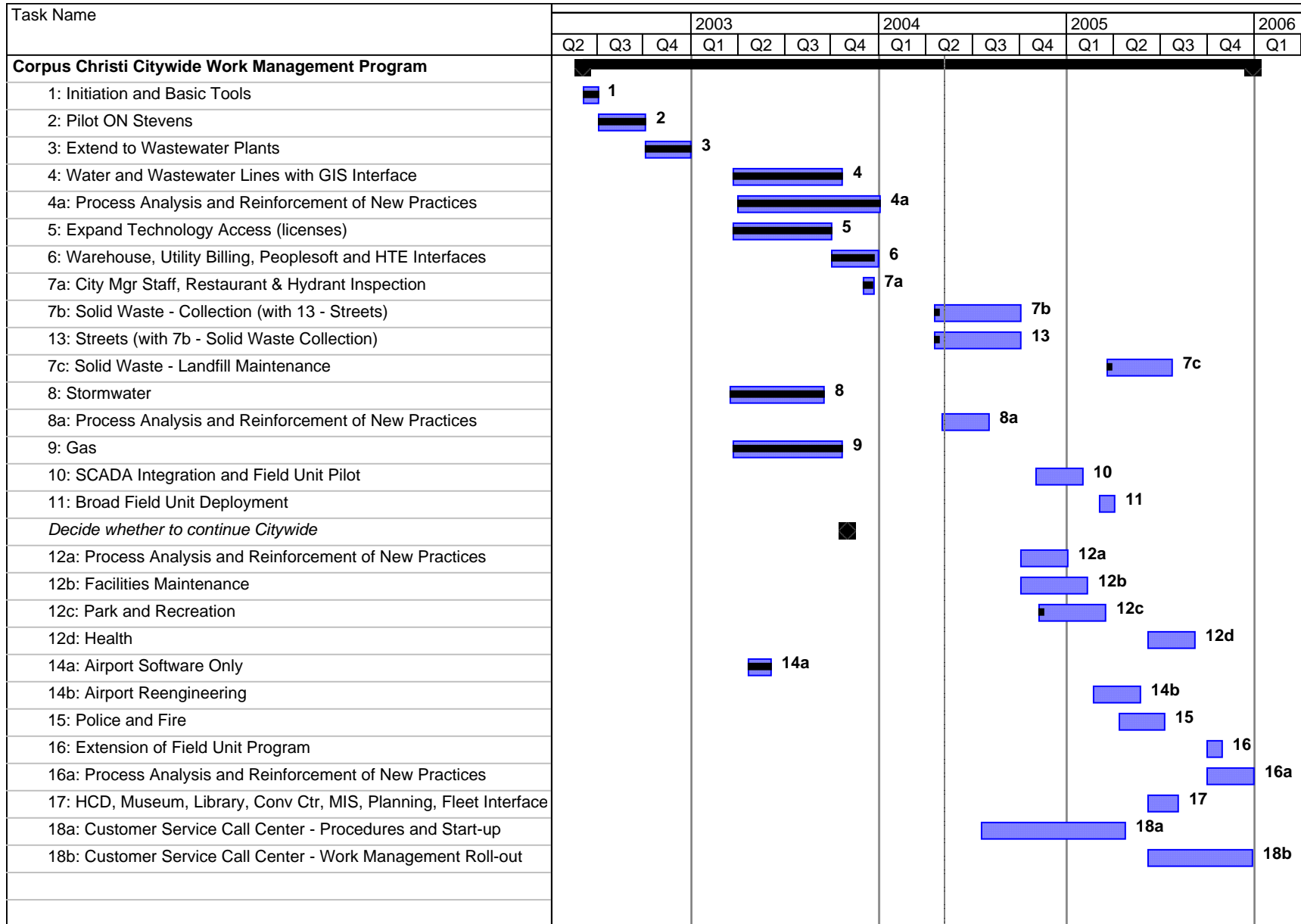
<b>Meeting/Workshop</b>	<b>Suggested Location</b>	<b>Date</b>	<b>Start</b>	<b>Finish</b>	<b>City Attendees</b>	<b>EMA Lead (Agenda Manager)</b>
Train p/s, stock managers, coordinators on materials management processes/screens - Group 1	Water Admin Computer Training Room	7/7/04	8:00 AM	5:00 PM	"Live" P/S, stock managers, Coordinators	Michele
Train p/s, stock managers, coordinators on materials management processes/screens - Group 2	Water Admin Computer Training Room	7/8/04	8:00 AM	5:00 PM	"Live" P/S, stock managers, Coordinators	Michele
Train p/s, stock managers, coordinators on materials management processes/screens - Group 3	Water Admin Computer Training Room	7/9/04	8:00 AM	5:00 PM	"Live" P/S, stock managers, Coordinators	Michele
Training class for Water, Gas, and UBO on meter changeout process	Water Admin Computer Training Room	7/12/04	8:00 AM	12:00 PM	Water, Gas, and UBO P/S, Coordinators, Key Team Leaders	Melissa
Finalize processes with UFO and Call Takers (software walkthrough in Test)	Water Admin Computer Training Room	7/12/04	1:00 PM	5:00 PM	UBO UFO and Call Center Leaders	Melissa
Finalize processes with P/S, coordinators, dispatch (software walk-through in test)	Water Admin Computer Training Room	7/13/04	8:00 AM	5:00 PM	Park, Facility Maintenance, and Solid Waste P/S and Coordinator Candidates and dispatchers	Jon
Refresher - Train P/S on condition-based PMs	Water Admin Large Conference Room	7/13/04	8:00 AM	5:00 PM	"Live" P/S with SCADA	Melissa
Public works joint planning coaching - Review job plans that need joint planning	Water Admin Computer Training Room	7/14/04	8:00 AM	5:00 PM	Utility and Street P/S	Jon

<b>Meeting/Workshop</b>	<b>Suggested Location</b>	<b>Date</b>	<b>Start</b>	<b>Finish</b>	<b>City Attendees</b>	<b>EMA Lead (Agenda Manager)</b>
Public works joint planning coaching - Review process; joint plan actual backlog	Water Admin Computer Training Room	7/15/04	8:00 AM	5:00 PM	Utility and Street P/S	Jon
Train UFO staff	Water Admin Computer Training Room	7/15/04	8:00 AM	12:00 PM	UBO UFO and Call Center Leaders	Melissa
Train UBO Call Takers	City Hall Basement Computer Training Room?	7/15/04	1:00 PM	5:00 PM	UBO Call Takers	Melissa
Train UBO Call Takers	City Hall Basement Computer Training Room?	7/16/04	8:00 AM	5:00 PM	UBO Call Takers	Melissa
Streets and Solid Waste Leadership Workshop (roles, reports, performance metrics)	Library? (Off site)	7/16/04	8:00 AM	12:00 PM	Streets Leadership (including P/S, Coordinators)	Nancy, Jon
Park and Facility Maintenance Leadership workshop (roles, reports, performance metrics)	Library? (Off site)	7/16/04	1:00 PM	5:00 PM	Park and Facility Maintenance Leadership, (including P/S and Coordinators)	Nancy, Jon
Final SW review for p/s and coordinators	Water Admin Computer Training Room	7/26/04	8:00 AM	5:00 PM	Park, Facility Maintenance, and Solid Waste P/S and Coordinators	Jon
Final SW review for p/s and coordinators	Water Admin Computer Training Room	7/27/04	8:00 AM	5:00 PM	Park, Facility Maintenance, and Solid Waste P/S and Coordinators	Jon
Train call takers/dispatchers	Water Admin Computer Training Room	7/28/04	8:00 AM	5:00 PM	Park, Facility Maintenance, and Solid Waste Call Takers	Jon

Meeting/Workshop	Suggested Location	Date	Start	Finish	City Attendees	EMA Lead (Agenda Manager)
Train team leaders (data entry) - Group 1	Water Admin Computer Training Room	7/29/04	8:00 AM	12:00 PM	UFO, Park, Facility Maintenance, and Solid Waste Team Leaders (Data Entry)	Jon
Train team leaders (data entry) - Group 2	Water Admin Computer Training Room	7/29/04	1:00 PM	5:00 PM	UFO, Park, Facility Maintenance, and Solid Waste Team Leaders (Data Entry)	Jon
Train UBO Call Takers	City Hall Basement Computer Training Room?	7/29/04	8:00 AM	5:00 PM	UBO Call Takers	Melissa
Train team leaders (data entry) - Group 3	Water Admin Computer Training Room	7/30/04	8:00 AM	12:00 PM	UFO, Park, Facility Maintenance, and Solid Waste Team Leaders (Data Entry)	Jon
<b>Go Live for UBO, Park and Recreation, Facility Maintenance, and Solid Waste</b>		<b>8/2/04</b>	<b>8:00 AM</b>	<b>5:00 PM</b>		
Field Unit Pilot Objectives Workshop / Evaluation Plan	Water Admin Computer Training Room	8/9/04	8:00 AM	5:00 PM	Field Pilot Participants	Melissa
Train (practices and technology for new work requests for one department)	Water Admin Computer Training Room	9/20/04	8:00 AM	5:00 PM	Call Center	Michele
Train (practices and technology for new work requests for one department)	Water Admin Computer Training Room	9/21/04	8:00 AM	5:00 PM	Call Center	Michele
Workshop - Field unit	Water Admin	10/18/04	8:00 AM	5:00 PM	Field Pilot	Melissa

<b>Meeting/Workshop</b>	<b>Suggested Location</b>	<b>Date</b>	<b>Start</b>	<b>Finish</b>	<b>City Attendees</b>	<b>EMA Lead (Agenda Manager)</b>
technical approach (pilot analysis)	Computer Training Room				Participants	

# General Program Schedule



## 2004 Project Activities – Streets and Solid Waste

ID	Task Name	Jan				Feb				Mar				Ap		
		12/21	12/28	1/4	1/11	1/18	1/25	2/1	2/8	2/15	2/22	2/29	3/7	3/14	3/21	3/28
3	<b>Streets and Solid Waste</b>	[Gantt bar spanning from 12/21 to 3/28]														
4	SSW - Preliminary organizational discussion	[Bar]														
5	SSW - Introduce best practices (the game)					[Bar]										
6	S - Introduce software							[Bar]								
7	SSW - Document customer report and asset failure codes							[Bar]								
8	<b>S - Introduce workflow and standards (MOP)</b>										[Bar]					
9	MOP workshop - work order life cycle overview; standard codes (Appendix A)										[Bar]					
10	MOP workshop - workflow for each phase of WO life cycle										[Bar]					
11	S - Core concepts workshop (job plans, PMs, p/s role)										[Bar]					
12	<b>S - Coach Streets job plan developers</b>										[Bar]					
13	S- Coach Signal Job Plan Developers										[Bar]					
14	S- Coach Sign/Markings Job Plan Developers										[Bar]					
15	S- Coach Pavement Job Plan Developers										[Bar]					
16	SSW - GIS meetings one-on-one with Eva, John, and Danny (introduce MAXIMO aware)										[Bar]					
17	SSW - Asset data workshop - Asset types, MAXIMO specs, GIS Cross-reference										[Bar]					
18	SSW - GIS SSW data development planning										[Bar]					
19	SSW - Meet with SSW and MIS GIS staff - data maintenance planning, data quality issues										[Bar]					
20	S - Identify users; initiate internal IT readiness review and user set-up											[Bar]				
21	<b>SSW - Legacy System Migration</b>										[Bar]					
22	SSW - technical workshop - legacy system migration										[Bar]					
23	SSW - technical review - finalize legacy system plans										[Bar]					
24	S - Meet with leadership - Identify MRCs and likely coordinators and P/S (and possibly shop stock)										[Bar]					
25	S - Review job plans; coach PM creation													[Bar]		

## 2004 Project Activities – Streets and Solid Waste (continued)

ID	Task Name	Apr				May				Jun				Jul		
		3/21	3/28	4/4	4/11	4/18	4/25	5/2	5/9	5/16	5/23	5/30	6/6	6/13	6/20	6/27
26	SSW - Make GIS data MAXIMO-aware				[Bar from 4/11 to 4/25]											
27	SSW - Load asset and legacy data to CMMS_TS1							[Bar from 5/2 to 5/16]								
28	S - Review asset data, customer/problem codes, job plans, and PMs				[Bar at 4/11]											
29	SSW - Configure/test screens and reports	[Bar from 3/21 to 4/25]														
30	S - Finalize organizational plan; touch base on IT readiness and user accounts			[Bar at 4/4]												
31	S - Finalize processes with P/S, coordinators, dispatch (software walk-through in test)							[Bar at 5/2]								
32	SSW - Refine screens and reports							[Bar at 5/9]								
33	SSW - Configure production (data, screens, reports, users)								[Bar from 5/16 to 5/23]							
34	S - Final SW review for p/s and coordinators									[Bar at 5/23]						
35	S - Train call takers/dispatchers										[Bar at 5/30]					
36	S - Train team leaders/data entry											[Bar at 6/6]				
37	S - Go live (coaching)												[Bar from 6/13 to 6/20]			
38	SW - Confirm users; touch base on IT readiness and user set-up	[Bar at 3/28]														
39	SW - Introduce software, workflow, and MOP				[Bar from 4/11 to 4/18]											
40	SW - Confirm organization structure (roles)				[Bar at 4/11]											
41	SW - Core concepts workshop (job plans, PMs, p/s role)				[Bar at 4/11]											
42	SW - Coach job plan developers				[Bar at 4/11]											
43	SW - Review job plans; coach PM creation							[Bar at 5/2]								

ID	Task Name	Jun				Jul				Aug				Sep	
		5/16	5/23	5/30	6/6	6/13	6/20	6/27	7/4	7/11	7/18	7/25	8/1	8/8	8/15
44	SW - Finalize processes with P/S, coordinators, dispatch (software walk-through in test) - with PF								[Bar at 7/11]						
45	SSW - Leadership workshop (roles, reports, performance metrics)								[Bar at 7/11]						
46	SW - Train call takers/dispatchers - with PF										[Bar at 7/25]				
47	SW - Train team leaders/data entry - with PF										[Bar at 7/25]				
48	SW - Go live (coaching)											[Bar from 8/1 to 8/8]			

## 2004 Project Activities – Park and Rec / Facility Maintenance

ID	Task Name	Mar					Apr				May				Jun				Jul	
		2/29	3/7	3/14	3/21	3/28	4/4	4/11	4/18	4/25	5/2	5/9	5/16	5/23	5/30	6/6	6/13	6/20	6/27	
49	<b>Park and Recreation and Facility Maintenance</b>	[Gantt bar]																		
50	P - Preliminary organizational discussion (MRC, p/s, Coordinators)	[Vertical bar at 2/29]																		
51	F - Preliminary organizational discussion (MRC, p/s, coordinator)	[Vertical bar at 2/29]																		
52	PF - Introduce best practices (the game)	[Blue square at 3/14]																		
53	PF - Introduce software, workflow, and MOP - with SW	[Blue square at 4/11]																		
54	P - Identify MRCs and likely coordinators and P/S	[Vertical bar at 3/21]																		
55	P - Identify users; initiate internal IT readiness review and user set-up	[Vertical bar at 3/21]																		
56	F - Identify users; initiate internal IT readiness review and user set-up	[Vertical bar at 3/21]																		
57	PF - Core concepts workshop (job plans, PMS, p/s role) - with SW	[Vertical bar at 4/11]																		
58	PF - Coach job plan developers	[Vertical bar at 4/11]																		
59	PF - Document customer report and asset failure codes	[Vertical bar at 5/2]																		
60	PF - Plan legacy system migration and asset hierarchy strategy for buildings	[Vertical bar at 4/11]																		
61	PF - Asset data workshop - asset types, asset hierarchy guidelines, and MAXIMO specs	[Vertical bar at 5/2]																		
62	PF - Review job plans and asset hierarchy; coach PM creation	[Vertical bar at 5/30]																		
63	PF - Finalize legacy system plans and asset hierarchy	[Vertical bar at 6/13]																		
64	PF - Review asset data, customer/problem codes, job plans, and PMS	[Vertical bar at 6/20]																		
65	PF - Configure CMMS_TST (screens, reports)	[Blue bar from 6/13 to 6/20]																		
66	P - Finalize organizational plans; touch base on IT readiness and user accounts	[Vertical bar at 6/27]																		
67	F - Finalize organizational plans; touch base on IT readiness and user accounts	[Vertical bar at 6/27]																		

ID	Task Name	May				Jun				Jul				Aug				Sep		
		4/25	5/2	5/9	5/16	5/23	5/30	6/6	6/13	6/20	6/27	7/4	7/11	7/18	7/25	8/1	8/8	8/15	8/22	8/29
68	PF - Leadership workshop (roles, reports, performance metrics)	[Vertical bar at 7/11]																		
69	PF - Finalize processes with P/S, coordinators, dispatch (software walk-through in test)	[Blue square at 7/11]																		
70	PF - Configure production (data, screens, reports, users)	[Blue bar from 7/11 to 7/18]																		
71	PF - Final SW review for p/s and coordinators	[Vertical bar at 7/25]																		
72	PF - Train call takers/dispatchers	[Vertical bar at 7/25]																		
73	PF - Train team leaders/data entry	[Vertical bar at 7/25]																		
74	PF - Go live (coaching)	[Blue bar from 8/1 to 8/8]																		

## 2004 Project Activities – Call Center

ID	Task Name	Feb					Mar					Apr					May					Jun	
		2/1	2/8	2/15	2/22	2/29	3/7	3/14	3/21	3/28	4/4	4/11	4/18	4/25	5/2	5/9	5/16	5/23	5/30				
75	<b>Call Center Support</b>	[Solid black bar]																					
76	Introduce software	[Small blue bar]																					
77	Define data access (reports)		[Small blue bar]																				
78	Load/test FAQs						[Solid blue bar]	[Solid blue bar]	[Solid blue bar]	[Solid blue bar]	[Solid blue bar]												
79	Refine/test software modifications																	[Solid blue bar]	[Solid blue bar]				
80	Develop/test data access (reports)																	[Solid blue bar]	[Solid blue bar]				
81	<b>Plan call center growth (scope, size, hours)</b>						[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]	[Solid black bar]		
82	Call Center Growth Plan Discussion					[Small blue bar]																	
83	Call Center Growth Plan Review																			[Small blue bar]			
84	Walk through Processes and Software in Test																	[Small blue bar]					
85	Review processes, screens and reports (walkthrough)																			[Small blue bar]			
86	Train (practices and technology for contact creation, inquiries, transfers, work status review,																				[Small blue bar]		

ID	Task Name	Jun					Jul					Aug					Sep					O
		5/30	6/6	6/13	6/20	6/27	7/4	7/11	7/18	7/25	8/1	8/8	8/15	8/22	8/29	9/5	9/12	9/19	9/26			
87	Go live (coaching) with inquiries, transfers, "advocacy" or "complaint" process	[Small blue bar]																				
88	Train/coach for FAQ maintenance (update FAQs)			[Small blue bar]																		
89	Process analysis and refinement; plan for first department for work order creation						[Small blue bar]															
90	Train (practices and technology for new work requests for one department)																			[Small blue bar]		
91	Go live (coaching) with new requests for one department																				[Small blue bar]	

## 2004 Project Activities – SCADA Integration, Field Unit Pilot, Reinforcement

ID	Task Name	Jul					Aug					Sep				Oct			Nov	
		6/27	7/4	7/11	7/18	7/25	8/1	8/8	8/15	8/22	8/29	9/5	9/12	9/19	9/26	10/3	10/10	10/17	10/24	10/31
92	<b>SCADA Integration</b>	[Gantt bar from 6/27 to 7/11]																		
93	Integration design workshop	[Gantt bar from 6/27 to 6/27]																		
94	Develop/test integration	[Gantt bar from 6/27 to 7/4]																		
95	Put links into production	[Gantt bar from 7/11 to 7/11]																		
96	Refresher - Train P/S on condition-based PMs	[Gantt bar from 7/18 to 7/18]																		
97	<b>Field Unit Pilot</b>	[Gantt bar from 8/1 to 10/17]																		
98	Pilot objectives workshop / evaluation plan	[Gantt bar from 8/1 to 8/1]																		
99	Evaluate technical alternatives (per plan)	[Gantt bar from 9/12 to 9/26]																		
100	Workshop - Field unit technical approach (pilot analysis)	[Gantt bar from 10/17 to 10/17]																		

ID	Task Name	Feb					Mar				Apr				May	
		1/25	2/1	2/8	2/15	2/22	2/29	3/7	3/14	3/21	3/28	4/4	4/11	4/18	4/25	
101	<b>Reinforcement</b>	[Gantt bar from 1/25 to 4/25]														
102	Practices training for public works leadership (the game)	[Gantt bar from 1/25 to 1/25]														
103	Practices training for Water and Wastewater p/s and coordinators(the game)	[Gantt bar from 1/25 to 1/25]														
104	Utility process analysis and job plan coaching	[Gantt bar from 2/8 to 2/8]														
105	Practices training for Gas and Storm p/s and coordinatos (the game) - with PF	[Gantt bar from 3/14 to 3/14]														
106	Utility materials and tools costing coaching	[Gantt bar from 3/21 to 3/21]														

ID	Task Name	May					Jun				Jul					
		4/25	5/2	5/9	5/16	5/23	5/30	6/6	6/13	6/20	6/27	7/4	7/11	7/18	7/25	
107	Utility technology touch-base	[Gantt bar from 5/2 to 5/2]														
108	Refine technology per touch-base	[Gantt bar from 5/9 to 6/13]														
109	<b>Materials management</b>	[Gantt bar from 5/2 to 7/11]														
110	Add base practices to MOP	[Gantt bar from 5/9 to 5/23]														
111	Workshop - introduce materials management/refine processes	[Gantt bar from 6/13 to 6/13]														
112	Configure materials management screens and reports	[Gantt bar from 6/20 to 7/4]														
113	Train p/s, stock managers, coordinators on materials mgmt	[Gantt bar from 7/11 to 7/11]														
114	Utility process analysis and PM coaching	[Gantt bar from 6/27 to 6/27]														
115	Public works joint planning coaching	[Gantt bar from 7/18 to 7/18]														

## 2004 Project Activities – HTE / UBO / Misc.

