Project Methodology

Overview

The City of Pearland is seeking an independent consultant to review and assess the City's Finance Department's organizational structure, operational functions, and levels of staffing and make recommendations that will enhance the operations for current and future needs of the Finance Department.

The objectives of this engagement are to:

- Gauge the efficiency and effectiveness of the City's Finance Department organizational structure and existing staffing assignments within the context of best practices.
- Provide an analysis of the gaps within the Department.
- Provide organizational structure recommendations based on benchmark comparisons with other similar-sized cities.
- Advise on priority for changes that will maximize improvements. Include costs for these recommendations.
- Provide recommendations to the City Manager and the CFO.

Project Approach

SGR distinguishes itself from our competitors by drilling down into the details for our clients, mining critical insights from data and summarizing key decision points for staff and governing bodies. We deliver a comprehensive and integrated approach to supporting the City's financial, technical and management decisions.

The figure below illustrates SGR's proven project approach.

Integrated Management Consulting Strategy Expertise Supports Public Endorsement

SGR brings over 20 years of expertise in management assessment, organizational review, stakeholder, strategic planning, and financial planning experience. Integrating the community and the City's broader goals and values while reinforcing strategic principles that will support broader stakeholder acceptance and endorsement is key to our approach. In addition, SGR has been involved with numerous due diligence evaluations of organizational development to identify the best practices, areas of improvement, and risk exposure across all areas of the organization, including People, Process, Data, Financial, Technology, and Infrastructure.

SGR routinely uses the following evaluation steps. It is our understanding that the first evaluation should address each step at a high level. SGR will meet with the City during our review and work at the City's direction on specific areas of focus if, during our deliberations on the steps evaluated below, the City would like additional review of a given area.

Work Plan

SGR is mindful of related costs, staffing considerations, and data availability. As such, SGR will operate within practical parameters to ensure limited resources are assigned only to work plans that maximize the financial and/or quality of service return on City investments.

Phase I – Project Initiation

SGR will set up a series of meetings with the appropriate personnel at the City to review the gap analysis, define project objectives, outline Study roles and responsibilities, and establish a project timeline. During the kickoff meeting, SGR will document any referenced data and add this to our initial request for information.

Phase I is expected to last 2-4 weeks from the start date.

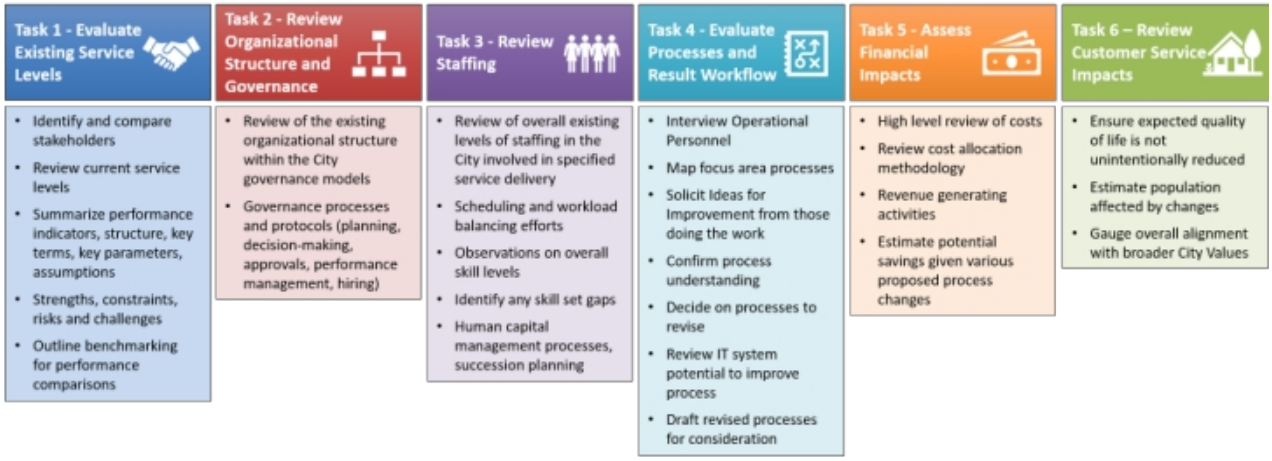
Deliverables:

- One (1) Meeting to Review Project Scope and Schedule
- Series of meetings with staff, Department Heads and City Manager
- Review of Available Data and Initial Data Requests

Phase II – Evaluation and Deliberation

SGR will evaluate the department's selected activities based on the evaluation steps and subcomponents shown below. Depending on the primary needs, some of the items listed in each task may not be applicable.

Within the evaluation tasks, SGR anticipates working quickly to find and focus on areas of greatest potential for our analysis, comparison to best practices, and summary report findings. Below are examples of some of the processes that may be used depending on the scope decided during the initial kickoff meeting.



SGR anticipates biweekly progress meetings with designated Study Champions and/or Department Heads. We estimate seven (7) progress and work session meetings lasting up to two (2) hours each.

At the final meeting of this process, SGR will summarize findings prior to final recommendations and our report.

Phase II is expected to last three 2-3 months.

Deliverables:

- Seven (7) Progress Update Meetings, including Evaluation and Deliberation Findings with Department
- Interim follow-up with designated staff

Phase III – Finalize Recommendations and Letter Report

Using our findings, SGR will formalize our recommendations and prepare a draft report for review by the City Manager and CFO or assigned Study lead.

City staff will have time to review for approval or make any changes prior to SGR issuing the Final Summary Report.

Phase III is expected to last 2–4 weeks.

Deliverables:

- Draft and Final Summary Report
- One (1) Meeting with City Manager/CFO and/or Other Designated Staff to Review Report Revisions

Project Timeline

Phases	Estimated Time for Completion
Phase 1: Project Initiation	2-4 weeks from start date
Phase 2: Evaluation and Deliberation	8-12 weeks
Phase 3: Finalize Recommendations and Letter Report	2-4 weeks
Total:	**20 weeks (5 months)**

Close Assignment

SGR will coordinate any additional arrangements and final billing with the City of Pearland representative.

Client Satisfaction Survey

SGR works very hard to deliver exceptional customer service and it is important to us to get honest and objective feedback from our clients. We may ask you to complete a client satisfaction survey and discuss any feedback and suggestions you may have that will help us in our goal of continuous process improvement.