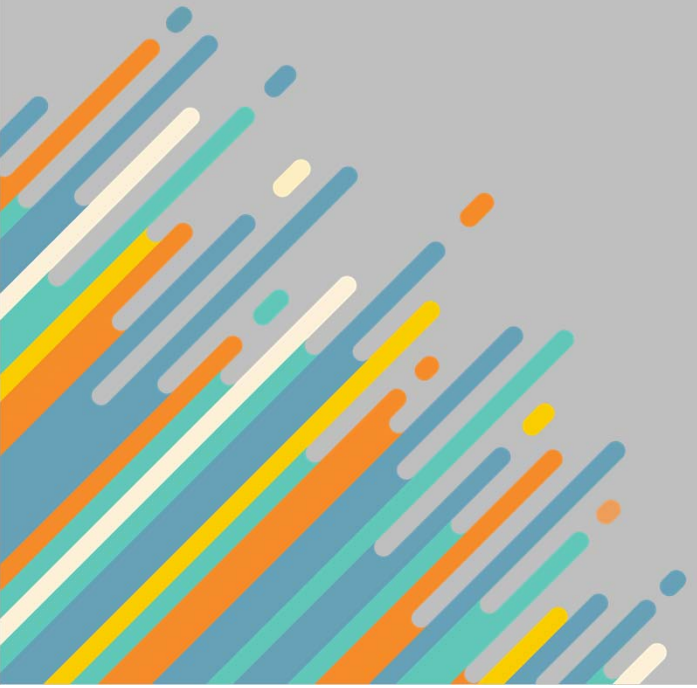
ROOT Staffing Requests

ORCA Joint Board

January 11, 2021

Agenda

- History
- Update on SLAs
  - Structure
  - Work Plan
- Requests
  - Marketing and Communications
  - System Operations
  - Financial Management
- Budget and Timeline Impact



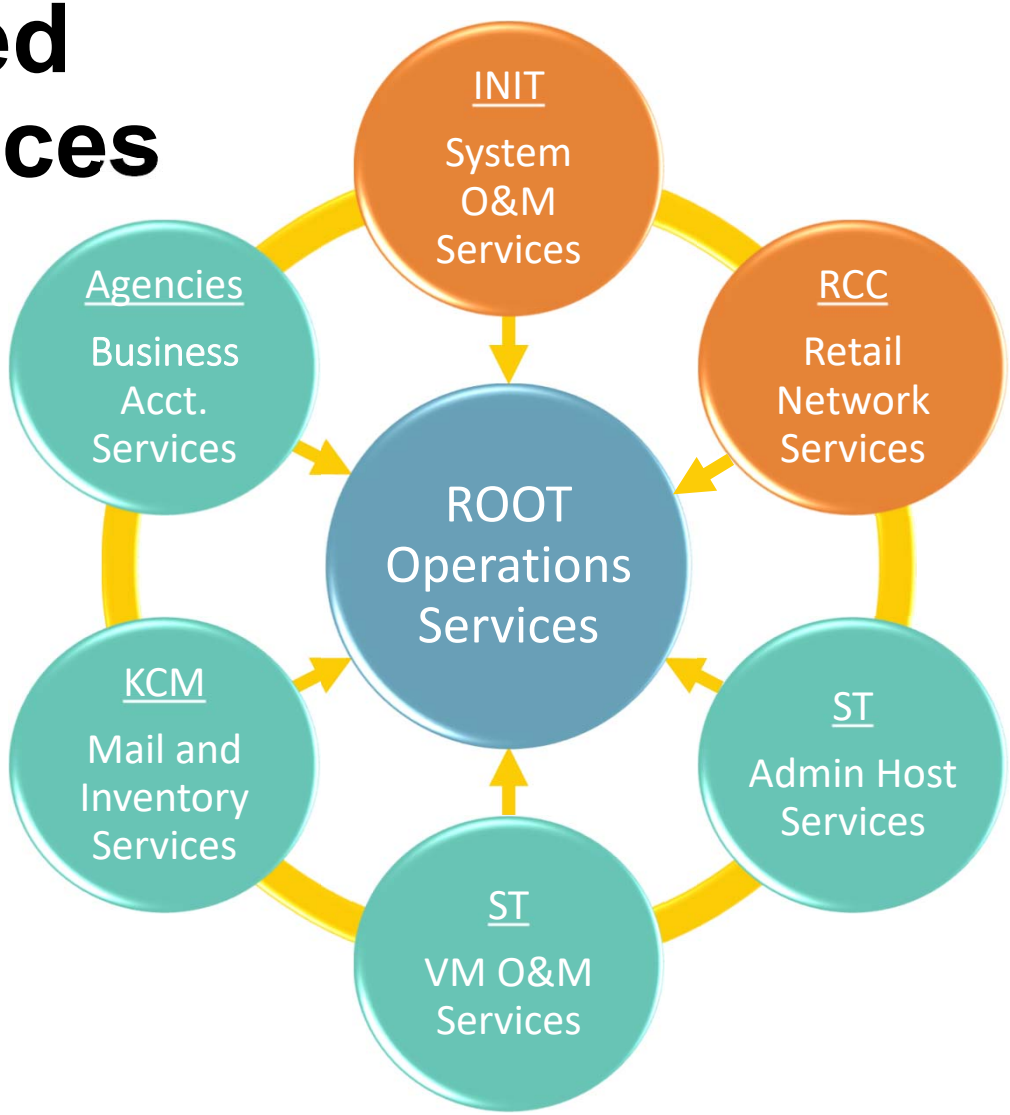
History

History – Joint Board Action

- JB Action – June 8, 2020 - Approve Regional ORCA Operations Team (ROOT) Implementation Organization
  - Prior to hiring ROOT staff in 2021, the Joint Board must approve the ROOT-Agency Service Level Agreement (SLA).
  - The Joint Board may, by exception and at their discretion, allow hiring for approved positions to commence in 2021 prior to SLA approval.
- Staffing Plan identified that staffing structure will adapt, due to:
  - Regional and vendor service-levels
  - Design decisions
  - ROOT Team Leaders' direction
  - Organization maturity, lessons learned

Update on SLAs

Centralized Ops Services



Update on SLA(s) – Work Plan

Master Agmt. Step	INIT O&M	Retail Network	Admin Host	VM O&M	Mail & Inv.	Bus. Acct.	ROOT Ops.
Identify parties	✓	✓	✓	✓	✓	✓	✓
Agreement framework	✓		✓	✓	In Progress	In Progress	In Progress
Circulate draft	✓						
Approve/execute							
Goal (2021)	Q2	Q4	Q1	Q1	Q3	Q3	Q2
Sub Agmt. Step	**INIT O&M**	**Retail Network**	**Admin Host**	**VM O&M**	**Mail & Inv.**	**Bus. Acct.**	**ROOT Ops.**
Identify sub agreement(s)	✓	TBD	✓	✓	✓	N/A	
Research best practice	✓		✓	✓			
Workshop sub agt.	In Progress			In Progress			
Circulate draft							
Approve/execute							
Ongoing maintenance							

Requests

Marketing and Communications

- **Request**
  - MarCom Team: Digital Marketing Specialist → **Marketing Project Manager**
    - Functions: drive day-to-day execution of product marketing; develop content
- **Rationale**
  - Strong regional marketing progress to date: scope, budget and early deliverables
  - Align resources to workback plan in support of project milestones
  - ORCA Agencies and customers will have a better next gen experience
  - Role will take on both launch and long-term responsibilities
  - Cost-effective; action will not increase long-term operating costs

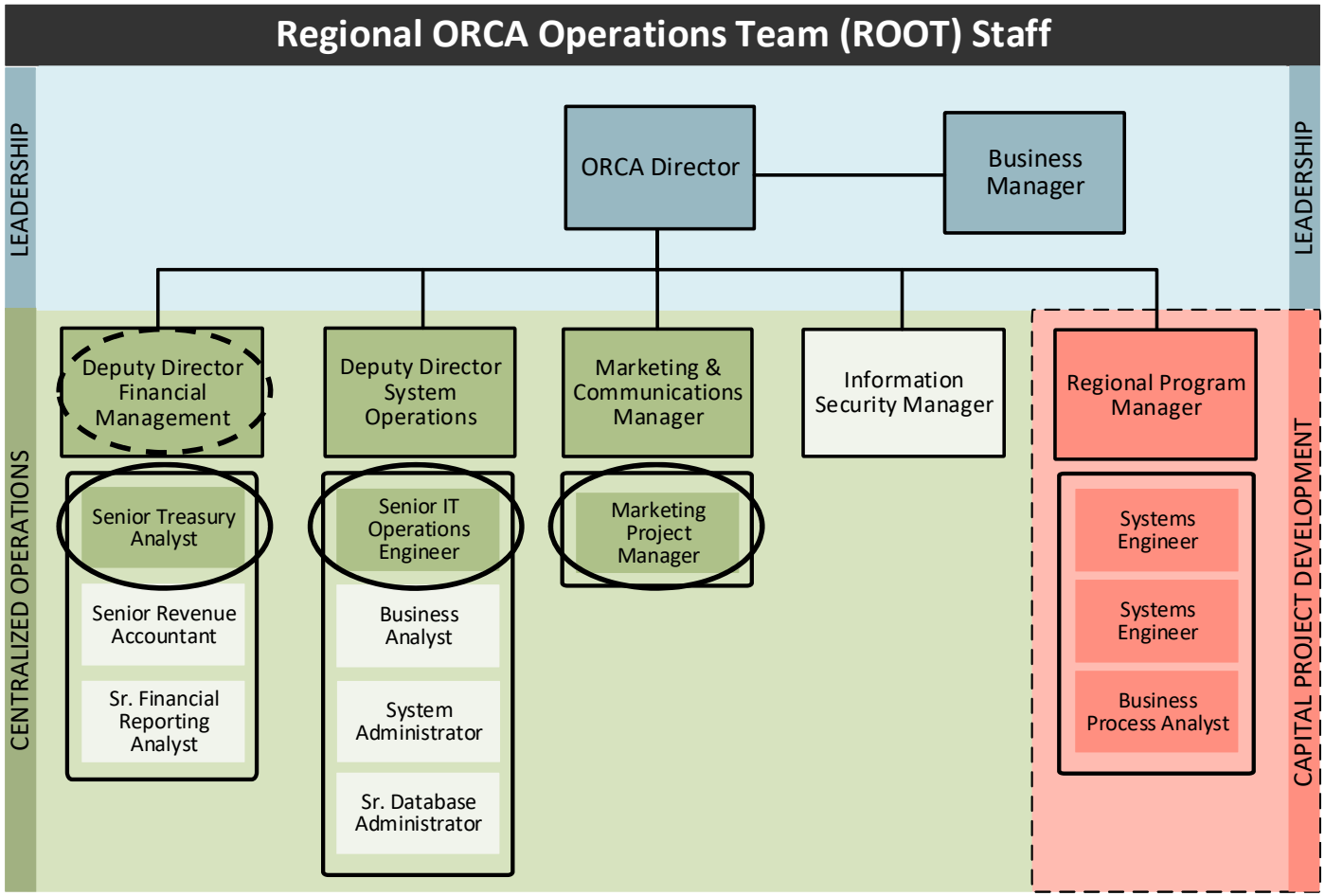
System Operations

- **Request**
  - SysOps Team: Sr. Sys Admin → **IT Operations Engineer**
    - Functions: ensure reliability of systems; lead IT change and problem management
- **Rationale**
  - Increase operational efficiency through early-stage automation and integration
  - Detail technical operational needs to project for enhanced systems capabilities
  - Contribute to/significant learnings from Systems and Field Integration Testing phases
  - Quicker maturation of INIT-ROOT-Agency tech support processes, system automation
  - Faster ramp-up of future hires; decreases additional on-the-job training
  - Lessen the technical demands on project team for operational needs

Financial Management

- **Requests**
  - FinMan Team: Sr. Financial Analyst → **Sr. Treasury Analyst**
    - Functions: manage banking, agency settlement and reconciliation processes
  - FinMan Team: Reclass **Deputy Director, Financial Management**
    - Functions: build and manage team responsible for all financial aspects of system
- **Rationale**
  - Certainty of Financial Management System design, understanding ROOT's centralized financial responsibilities
  - Contribute to/significant learnings from System Integration Testing
  - Provide input into system operations and procedures documentation
  - Continuity in developing ROOT financial services and processes
  - Support financial transition planning from Legacy ORCA; reduce temp staff overlap

Summary of Requests



Summary

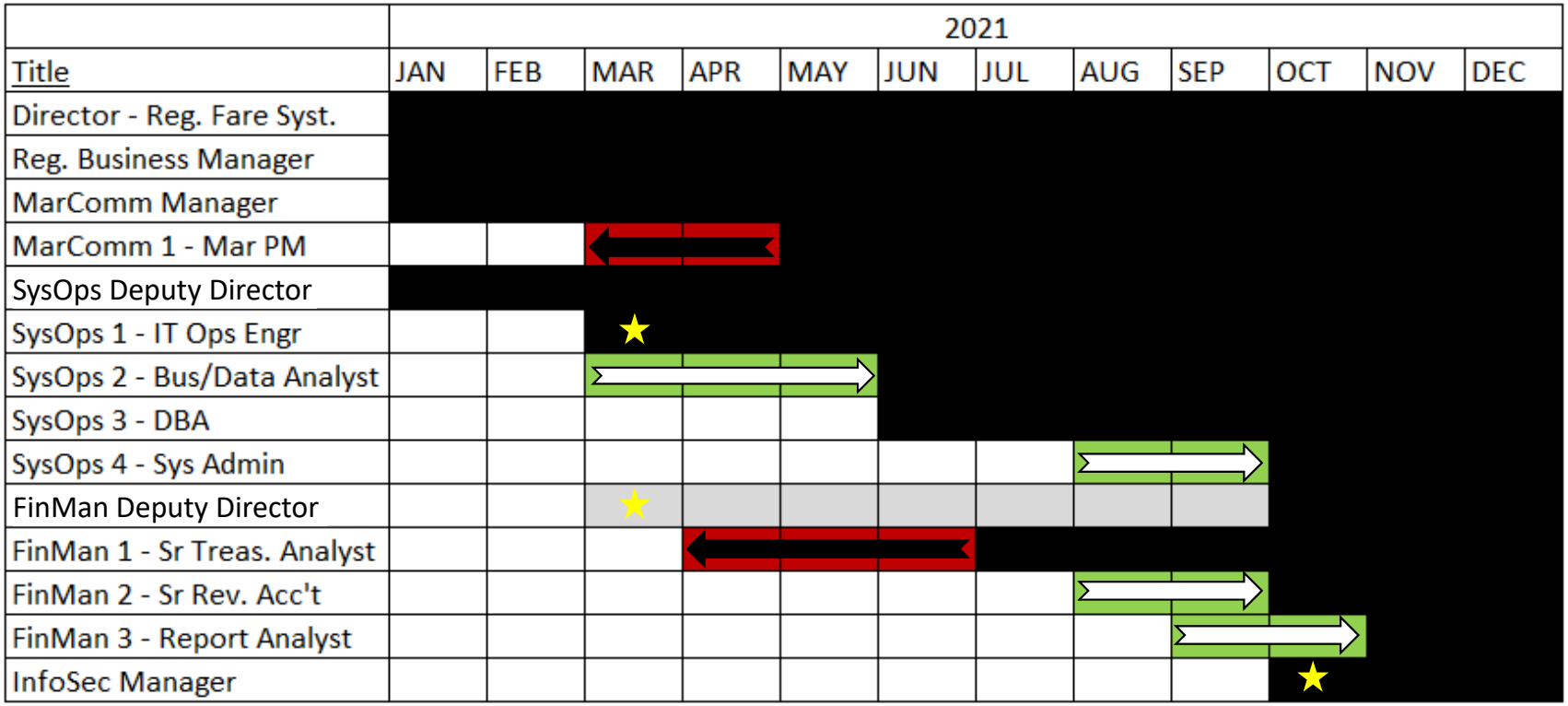
2 exception requests - Mar

1 exception request - Apr

1 reclassification request

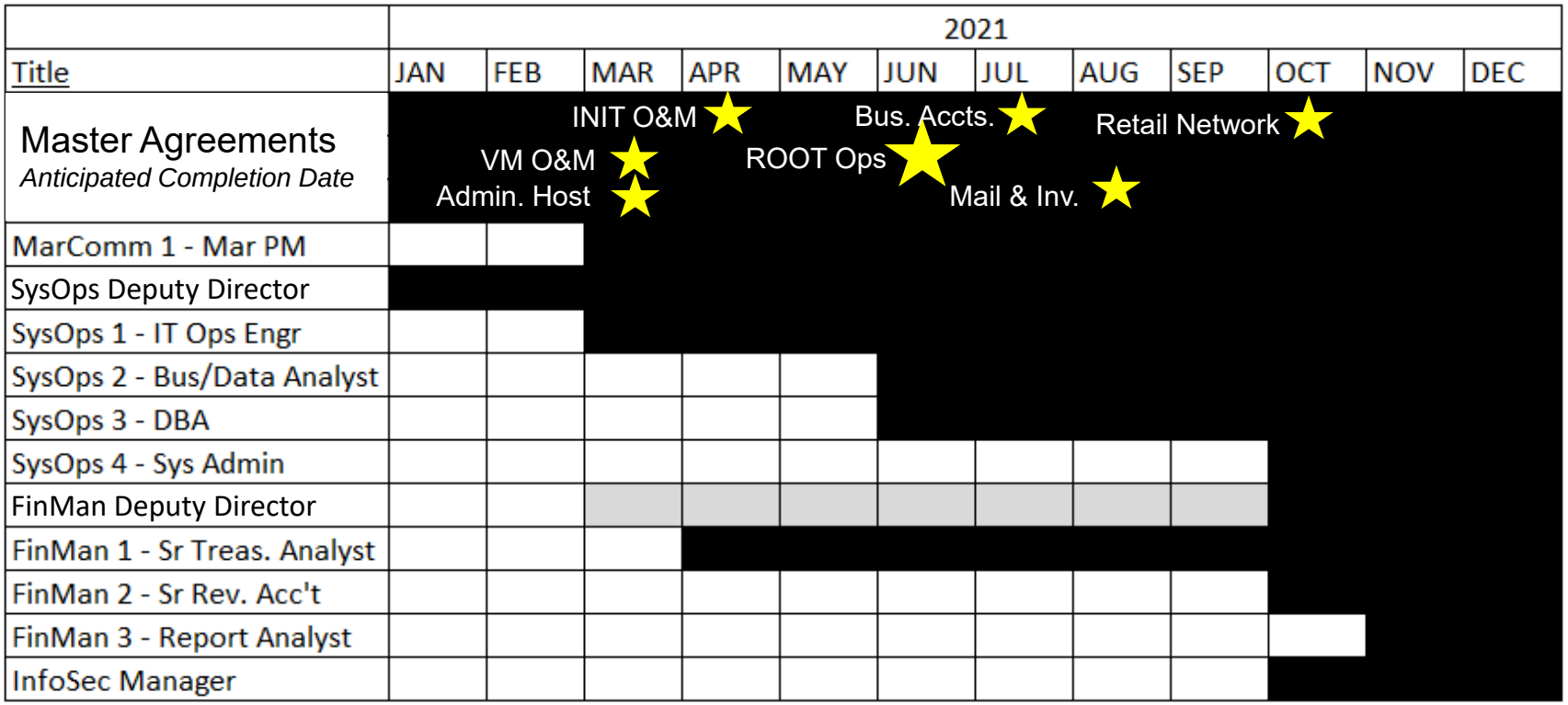
Budget and Timeline Impact

Budget Impact

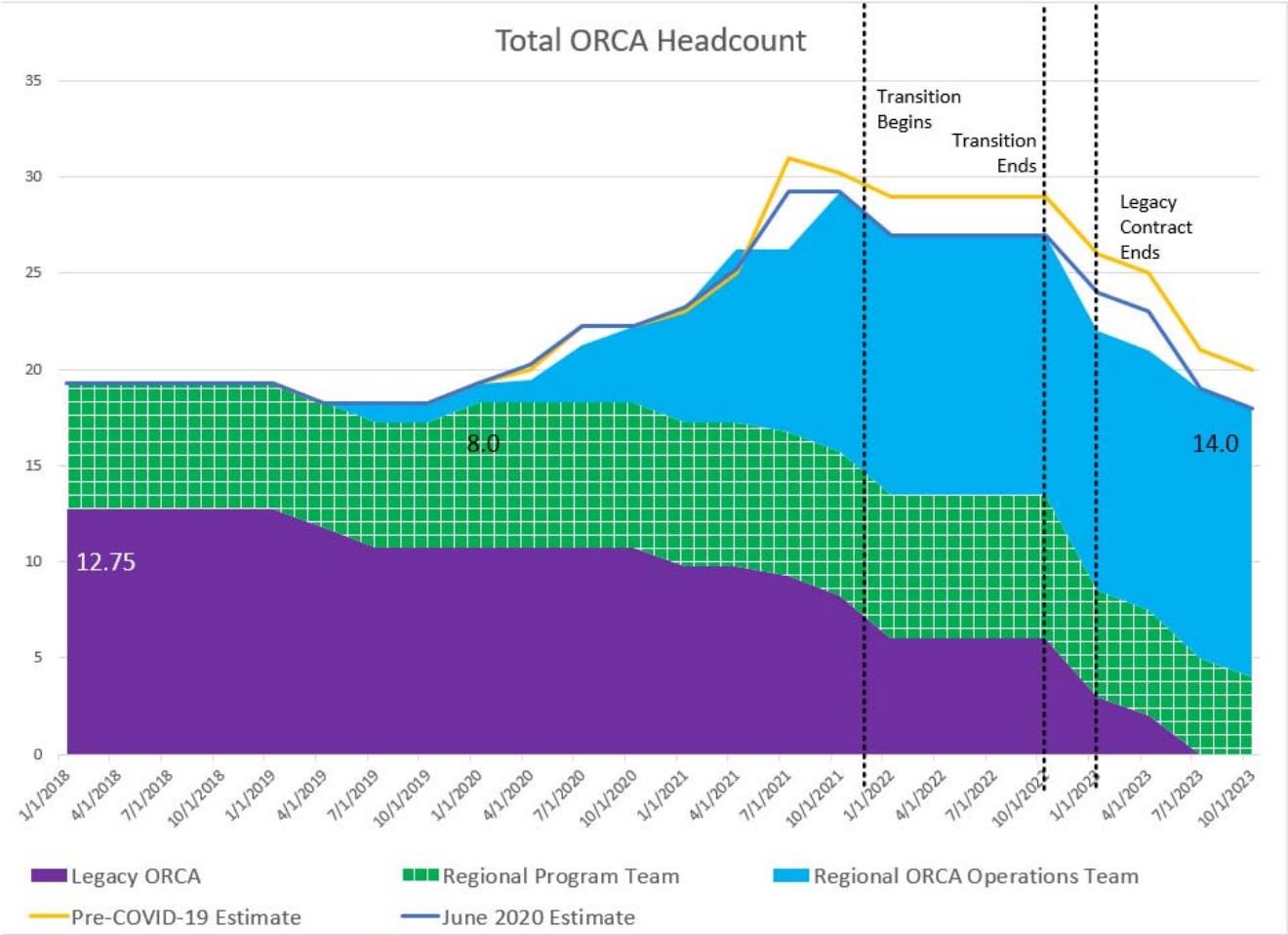


- *Net change: $50k decrease to overall budget*

Estimated Timeline



Estimated Timeline - Headcount



Thank you.

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