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## Agreement Success Plan

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Agreement Success Plan

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### **Abstract**

Monterey County Health Department's Administration Bureau works with contracts and agreements for the Public Health Bureau, which detail what services programs will complete so that they can receive funding or maintain a partnership with the County. The problem was that a large portion of the management analyst's time was dedicated towards technical support for agreements. The Agreement Success Pan is aimed to increase efficiency by aiding program staff with agreements through a Prezi, which is similar to a self paced webinar. The project had three phases; interviews of program supervisors or managers, gathering supporting documents, and final launch. Afterward, a questionnaire was sent to Public Health Bureau managers and supervisors to assess the resource, with results showing that 80% of participants expect to use the resource in the future. The plan is located on the county's SharePoint and it is recommended the agency update it in the future.

*Keywords:* County Agreements, Prezi, Health Department, Contracts and Agreements

### **Agency & Communities Served**

The Monterey County Health Department is a public agency whose mission is to “Excel at providing Quality Services for the benefit of all Monterey County residents while developing, maintaining, and enhancing the resources of the area” (County of Monterey, n.d.). They are greatly involved in creating new community resources and bettering current resources. They value quality customer service, integrity, and honesty among the county, innovation and being respectful and courteous of all employees. Their goals are to “Assure a sustainable and diversified economy that builds on Monterey County’s local assets. Enhance and improve County services to assure an adequate safety net and quality of life for all County residents. Assume a strong public safety system that protects the public and minimizes the fear of crime. Assure the financial stability of the County” (County of Monterey, n.d.).

Within the Health Department, there are many different branches and programs. I work in the Administration bureau with Contracts and Agreements. My mentor is Patricia McFadden who is the Management analyst for the department, she handles all of the contracts and agreements along with various other responsibilities. Within this program, it helps provide for many programs in the health department. The County has contracts with the Cannabis program, agreements with the Tobacco control, contracts with the County labs, CalFresh, First5, Active transportation program and many other programs. The county currently has more than 60 active agreements or contracts. These contracts and agreements provide funding for the programs or they can be a mutual agreement between the vendor and the County. Always, however, when conducting these contracts and agreements it is important that the Analyst work for the best of the County, this is one of the biggest responsibilities of the Analyst. They also have agreements

with programs or organizations outside of the County such as with various Universities for internships, for example, CSUMB has an agreement with the County which outlines the guidelines and agreements between the County and the University.

The Health Department is key in providing services to the County and maintaining or improving people's health within the county. They work with primary, secondary, and tertiary health levels through all of their different programs.

Monterey's health department tries to reach anyone living in Monterey County. In the administration branch, the primary clients or population served directly in the health department are the program staff. In general, within California, the majority of civil service employees are white at 43.4% and Hispanic or Latino at 24.9% (California Department of Human Resources, 2020). Within Monterey county, this percentage working in the health department is likely higher considering that the county is greatly made up of Hispanics and Latinos at 59% of the county compared to California with 39% of the population being Hispanic and Latinos (U.S. Census Bureau, 2018). The age varies greatly for civil service workers in California with about an even spread but with the majority, 28%, being between the ages of 40-49 (California Department of Human Resources, 2020). The average income level for these workers is usually between \$40,000-\$100,000, it is such a wide range due to the many different levels of work for the county and government workers (California Department of Human Resources, 2020). The income level is also such a large range because there is a lot of ways to climb the salary ladder and earn more money working in the same branch or department.

Monterey County Health Department has over 35 different programs to help serve the community. Some of these are in the chronic disease prevention branch such as Tobacco Control,

Tobacco Retail Licenses (TRL), Oral Health, or Cannabis. These programs help greatly at a policy level by prevention, as well as educational services to the community at events, centers, and at the public schools. Another branch is the Outreach and Education, which includes Wellness, Lactation/WIC, Safe Travels, and Active transportation Programs. This branch helps with safety protocols for travel and some specifically targeted towards schools. The Wellness program serves the staff and workers for the health department, providing a gym for staff, food, and nutrition training, even occasionally hosting classes such as yoga or mindfulness exercises. The WIC and Lactation program helps new mothers or pregnant women get access to services that are provided within the county and check in that the pregnancy and birth are all healthy which also overlaps with the WIC branch that includes clinical care and CalFresh Healthy Living. Additionally, there is the Children's Medical Services Branch, which includes clinics and therapy units to serve children in Monterey County with access to their necessary medical needs. The Community Based Nursing division of the Health Department addresses family, nutritional and whole person needs in the community by providing nurses that often do home visits, calls, or check-ins on people who request or are recommended to this program.

The county Communicable Disease Prevention and Control Division addresses HIV prevention, Immunizations, Tuberculosis, and Vital Records. This division is who works closely with COVID-19 protocols, prevention, and testing. The Public Health Laboratory is one of the main places that COVID-19 tests first started to go through. This division has been working very hard to monitor the new pandemic and what steps are important for the best of the Monterey County people's health. The Health Department targets to serve all of Monterey County from so

many standpoints and increase the overall health of its people, contracts and agreements indirectly affect this population.

The contracts and agreements provide funding and create memorandums to ensure that the delivery of health services to people in Monterey County follows through. Some of the most recent needs of people in Monterey County have been access to services, so the Health Department is always trying to reach out to the community and understand the greatest needs. When it comes to agreements, and the Administration Bureau the management analyst, Patricia, works closely with program directors and vendors completing agreements so that the programs can get the proper funding or create MOU's with their partners (i.e. other cities, non-profits, or individual vendors). The most prominent need to the directors and program staff have been in understanding the process, communicating with the analyst, and processing the agreements. Much of the staff working with Patricia do not have the access to the process or a place to see all of these steps that may not involve them when the contracts or agreements are being completed.

### **Problem Description**

The problem is that there is a large portion of the management analyst's time dedicated to technical support in executing agreements in the Monterey County Health Department-Administration Bureau. This is an issue that slows the contracting process and will limit how fast programs can begin delivering services.

### **Contributing Factors**

There is a lack of a resource for guidance on the initial stages of an agreement. This also includes a lack of knowledge on the milestones of executing an agreement. According to the Monterey County Health Department website, it has little to no information about the process

(County of Monterey, 2020). This webpage only has sample documents but nothing that goes through the entire process. This lack of resources forces people that are starting agreements to reach out and get a great deal of support from the Management Analyst, Patricia. Patricia in the past has conducted trainings, for the past two years, however, this has never been anything that was deliverable if you did not attend the training.

New employees also cause additional time to support, if an employee starts their job when there is not an upcoming training and they have a contract that they have to renew they often do not know the process because it is complex and takes time. The new employee then has to reach out to Patricia for that extra support. According to the U.S. Bureau of Labor Statistics, “the median number of years that wage and salary workers had been with their current employer was 4.1 years in January 2020” (2020). Considering that Patricia currently manages over 60 active contracts and they usually last at most 5 years that means that she is often working with new program employees that have not previously conducted a contract, contributing to the additional time Patricia spends on technical support with agreements.

Additionally, since Patricia has been in her position for more than 10 years staff have become dependent on her and ask for support often (personal communication, November 17, 2020). This additional support from staff that is not just new to their position adds to the time Patricia spends on support that is often repetitive and could easily be addressed by an established resource for support if they had one.

### **Consequences**

A consequence of Patricia spending extra time on technical support is that it takes away time from the programs to begin delivering services. According to the Analyst (personal



communication, November 17, 2020), program service delivery can be postponed or held up pending the agreement anywhere from 3 weeks to a month, due to the lack of timeliness at the beginning of the agreement.

Another consequence is when contracts take longer it can force them to have a retroactive date which causes board approval, another step that takes more time. The board does not look lightly upon this and does not like to see many agreements come through with retroactive dates. This is a consequence due to the initial creation of the agreement not being processed promptly. Patricia Mcfadden, the management analyst, stated that “Currently about 25% of agreements have a retroactive date” (personal communication, November 17, 2020). Having a retroactive date is not ideal and is meant to be avoided, this is an aspect of the contracts process that has changed since COVID-19 as well, causing more contracts to have retroactive dates.

**Problem Model**

<b>Contributing Factors</b>	<b>Problem</b>	<b>Consequences</b>
Lack of resource for guidance on milestones of executing an agreement	A large portion of time dedicated by the management analyst towards technical support in Monterey County Health Department-Public Health Bureau.	Contracts and agreements have a retroactive date which causes board approval.
New staff who do not have experience working on agreements.		Program service delivery is postponed or held up pending the agreement.
The program staff is very dependent on the analyst for the initial stages of an agreement.		

## **Capstone Project Description and Justification**

### **Capstone Project & Project Purpose**

The Agreement Success Plan is focused to address the need for education about the agreement process and increase the individuality of the program staff in the initial stages of agreement development. It is intended to better the Public Health Bureau, program staff's knowledge of the contracts and agreement process including the scope of work, understanding the terms of the agreement, and knowledge of completing a board report. The health department, specifically the Administration Bureau has previously done annual trainings on the process including October of 2019 and now October of 2020. These training sessions have been useful but are often not as useful as information and knowledge as time passes following the presentation. Additionally, the Management Analyst, Patricia Mcfadden, does a great deal of one-on-one mentoring or "customer service". This helps program staff and vendors along the process while also increasing their understanding, yet, it is very timely and not truly the most effective way to go about the process. Another challenge about the process is that each program staff along with the analyst have to consistently self-assess the process and what has changed.

The project will help the staff be able to efficiently benefit the community with better delivery of services. A goal of the project is that it will be relevant and useful after the completion of the internship and can be used for a while. It will be most useful to the stakeholders, program staff, to be able to use the Prezi continuously after completion of the internship. The Prezi resource is meant to increase the stakeholders' knowledge of the process, their ability to complete all documents including the scope of work, and the agreement terms

without any assistance from the analyst. The Prezi is not just meant to be a presentation, but rather a tool that is effective and easy to understand or utilize after initial implementation.

### **Project Justification**

The Prezi will be useful for the community by decreasing the amount of agreements that do not meet timelines and deadlines to start program activities. The program staff will be more independent in the initial completion of an agreement, and not as codependent on the analyst for the one-on-one mentoring or the great need for customer service. This will create a better delivery of service to the community by speeding the process and allowing the analyst more time to process already completed agreements.

The health department currently has templates and some resources on their website however, there are not any resources that are comprehensive of the entire process. There are templates for Exhibit A and the standard contract agreements (County of Monterey, n.d.). There is no resource for an explanation of the entire process that is comprehensive with all elements of an agreement. The Prezi is that resource, with sections for board reports, templates, routing information, and other sections to assist the program staff in the completion of agreements. In a study by Mobbs (2010), he found that having open and broad tools helped speed up the process of timely online learning. Mobbs explains that “all in one resources” are effective and useful for users, mainly because they can be considered a one-stop-shop (2010). The Prezi is aimed to be the one-stop-shop for help with contracts and agreements with sections on, the scope of work, board reports, templates for agreements, example language for sections on the agreements, as well as an in-depth review of the agreement process as a whole.

## **Project Implementation**

Before implementation of the Agreement Success Plan, I worked closely with Patricia on what would be the most essential parts of the project, those include sections on alert to expiration dates (retroactive dates), the scope of work practices, board approval, best practices for tracking agreements for program staff, and program description examples. Each of these sections are part of the Prezi presentation, the deliverables for this are examples for board reports, scope of work, program description, as well as routing forms. Throughout that time I set up interviews with four program staff with the goal of understanding their point of view and what would be most helpful to them in this Prezi. I created these interview questions and the main points of understanding during December.

Following the planning stage, I began my implementation which began with conducting the interviews in January. Then, I gathered all of the documents for the Prezi sections, which included the scope of work template/example, program description example language, alert to expiration SharePoint screenshots, example routing forms, example board reports, and the best practices for program staff to track agreements. After I compiled the documents into the Prezi, I created the different sections of board approval, tracking agreements, scope of work, the entire process, where to start, and MOU/MOA/Memorandums. I then created the Prezi with all the previous sections and eventually finalized it with a final review from Patricia. Once it was finalized I sent the Prezi to three people for feedback and to make minor changes. This was beneficial to the process because it got fresh eyes on the project and it strengthened the grammar and organization of the Agreement Success Plan immensely. Finally, I sent it to everyone that Patricia is currently working with or “frequent customers” that work with the contracts often,

including all supervisors and managers in the Public Health Bureau. I completed and sent out the Prezi to everyone in the middle of March.

### **Participants and Resources**

The main participants in the planning stage were Patricia, the people I interviewed and myself. The participants of the implementation and assessment period included all program staff in the Public Health Bureau as well as Patricia and myself. This project idea and plan were created by myself and Patricia McFadden. It was also brought to her attention when conducting the 2019 program staff training and that it was useful but after time the knowledge fades. All of the participants are vital to the success of this project, especially the program staff since the project was sent to them as a guide and example for the contracts and agreements process.

The resources that needed to be obtained prior to creating the Prezi were the documents that have been stated previously in the implementation as well as the links and screenshots to sources for the agreement process. Other resources that I utilized were the time of the people that I interviewed and Patricia's time in assisting with the thoroughness of the project. This time was utilized as meetings with Patricia as well as remote interviews with four program supervisors or managers.

### **Challenges**

Some challenges I faced were technological challenges or difficulties with editing on Prezi. However, I research ways to make the Prezi most effective and what work to include. I also studied Prezi prior to creating it so that I could map out the most effective and useful way to organize the project. Additionally, other issues I had concerning documents or formatting I scheduled meetings with my mentor to go over other options. Prezi was a newer format to my

mentor and myself so we navigated through it well and eventually had no technical difficulties after about two weeks of using it.

Another challenge was the time period of feedback from people in the health department. In the initial stage of interviews of employees, scheduling and conducting the interviews took about a month, two weeks longer than I planned but I was able to work with that and just started creating the Prezi before completing all of the interviews.

### **Overview**

The Agreement Success Plan Prezi project is a resource for the Public Health Bureau program staff to utilize when they are conducting an agreement or contract. The goal is for the program staff to be more independent in the process. The main objective is to increase knowledge of the program staff on contracts and agreements, as measured by the completion survey that addressed the new knowledge of the process and the usefulness of the Prezi.

The major phases of this project included planning, implementation, assessment, and reporting. As stated previously, the planning included brainstorming and finalizing all of the different sections of the project that Patricia and I wanted in the Prezi, as well as setting up interviews with four of the program staff. The implementation phase went as follows, conducting the interviews at the same time as gathering the materials for the Prezi, creating the Prezi, trial running the Prezi to three staff, and finally, sending the Prezi out to the entire program staff. After completion of the implementation phase, I created a survey that was sent out two days after the Prezi was sent out addressing how the project was successful, how it may be used in the future, as well as what improvements can be made. The planning stage took place November

2020-January 2021, the implementation phase January-March 2021, and the assessment phase was March-May 2021.

### **Expected Outcomes**

The short-term goal is to increase the knowledge of program staff on the agreement process. This will hopefully be achieved after one time going through the Prezi. This project is hoped to have longevity and make a lasting impact as well, so the intermediate outcome will be for program staff to be more independent in the process when they are completing future agreements. Becoming independent will be a behavior change and will take time but is expected to be successful based on the plan and how the project was constructed. The long-term impact will be faster delivery of services to the public through the agreements. This is possible by reducing the amount of technical work the Analyst does so they can focus more time towards the processing and routing of contracts that have already been reviewed and just need signatures.

### **Assessment Plan**

The expected outcomes of the Agreement Success Plan were to increase the knowledge that program staff within the Public Health Bureau of the Monterey County Health Department have on agreements and the process. To measure this, after the implementation stage a post-survey was sent to everyone who received the resource. Those who received the questionnaire included Public Health Bureau program staff as well as those with active contracts with the department. The survey contained questions concerning how the Prezi was helpful or harmful to their knowledge of the process. The strategy for the survey was to have questions with answers that will be useful as well as alternating questions in the negative and positive format. The expected outcome was that it increased the knowledge program staff have on

agreements. The survey also addressed how independent each staff member felt about completing an agreement in the future to address whether there was potential for a behavior change. This survey was sent two days after the final launch on the Prezi. The goal of the survey was to understand how successful the project was, as well as assist in the reporting of the project at the completion of the internship.

### **Project Results**

The survey had a 55% response rate with 11 participants out of the 20 total program managers or supervisors that completed the survey. As shown in Chart 1, about 80% of respondents are expected to have a behavior change of using the Agreement Success Plan in the future. Possible reasons that two people stated they will not use it in the future is due to the survey going out to some people who may not do agreements or contracts in their specific position but will be able to pass it on to people who do work with those in their program. The survey also showed that 100% of participants believe that the Prezi format is easy to use, as well as comprehensive of all components of the agreement process, as can be seen in chart 2 of the appendix. All expected short-term goals have been met since the majority of participants are expected to have the behavior change of using the plan while completing agreements in the future. All long-term goals have the potential to be met but can not be measured from the immediate questionnaire. The plan is currently located on the health department's SharePoint in the Current Agreements and Contracts page at the top.

### **Conclusion & Recommendations**

The recommendation for the Monterey County Health Department Administration Bureau is to utilize this Prezi and include it in all managers and supervisors initial training.



Additionally, for the best use of the Prezi, it will be important to update it whenever it is needed by the Management Analyst II. The Prezi will be the most useful when it is up to date and contains relevant information, so updating it in the future will be key to it maintaining its usefulness. It is also recommended that the management analyst send this plan to anyone with a current contract or agreement with the County. Additionally, every vendor or program that creates a new contract or agreement with the County should review the resource.

### **Personal Reflection**

This project was a very valuable experience and I learned a lot in the process. Working in the Health Department was very helpful to my understanding of professional communication as well as being emerged in a professional environment. The capstone project especially helped me build a network in the department and maintain communication with people other than my mentor, while being remote. The interviews, and trial run feedback from employees were vital to the success of the project and also gave me great experience for working with people in the health and human services field. I learned a lot about how the agency works, and how they try their best to serve the residents of Monterey county. My project I hope will have a lasting impact and change how contracts and agreements are processed in the County. The project will be an important part of the agency and I am proud of it and that I was able to make a lasting impact on the agency.

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**Appendix A**

**Scope of Work**

Scope of Work Template ( <i>Sample phases, activities, deliverables, timeline</i> )					
Title: Contracts and Agreements Workflow Prezi					
Project description: Create a Prezi presentation as a resource for program staff when there are questions for building their agreement or understanding the process.					
Goal: Program staff become more independent in the completion of the initial completion of an agreement.					
The primary objective of the project: Increase knowledge of the process, be able to assist with initial completion of the agreement process (scope of work, understanding the term of the agreement, knowledge of completing a board report).					
Phases		Activities/Tasks		Deliverables	Timeline/ deadlines
1	Select capstone project	1.1	Discuss capstone project ideas with mentor and agency staff	Generate a list of capstone project ideas.	Sept 2020
		1.2	Discuss ideas with agency staff	Submit a list of potential ideas to mentor for review/approval	Oct 2020
2	Plan project	2.1	Working with Patricia on what the essentials for the project will be (Including planning for sections on: alert to expiration dates,	Examples of all forms that I plan to gather during the implementation (Scope of work, Board	November-January 2021

			scope of work practices, MOU/MOA/Memorandums, board approval, best practices for tracking agreements for program staff, program description example, and the entire agreement process)	Reports, Program Description example, routing forms, MOU example, MOA Template, Memorandum example)	
		2.2	Set up who to interview from the program staff and set up Dates and Times	Interview Schedule	December 2021
3	Implement project	3.1	Interview Program Staff (Asking what their practices are for tracking agreements, or what would be most beneficial for tracking)	Interview 4 people, and what they would like included in a Prezi.	December-February 2021
		3.2	Gather all supporting documents for Prezi	Board Report template and example, Scope of work template and example, Program description example language use, MOU/ MOA/ Memorandum documents)	January/ February 2021
		3.3	Create and finalize Prezi	All supporting documents Gathered from the previous piece	February 2021
		3.4	Trial run the Prezi to three people	Prezi presentation	Beginning of March 2021

		3.5	Send Prezi presentation to entire program staff and all Public Health Bureau managers and supervisors	Prezi Presentation	Middle of March
4	Assess project	4.1	Analyze the data of pre-implementation and post implementation on customer service benefit	Data chart	April 2021
		4.2	Post Survey After two days of implementation Survey the program staff	Survey Analysis	March-April 2021
5	Report on project findings	5.1	Complete reporting requirements	Final agency and capstone reports	May 2021
		5.2	Prepare capstone presentation in the selected format	Present at Dress Rehearsal for grading	May 2021
		5.3	Final preparation for Capstone Festival	Final Capstone Festival presentation!	May 2021

**Results**

Chart 1

I will use this resource when conducting an agreement.

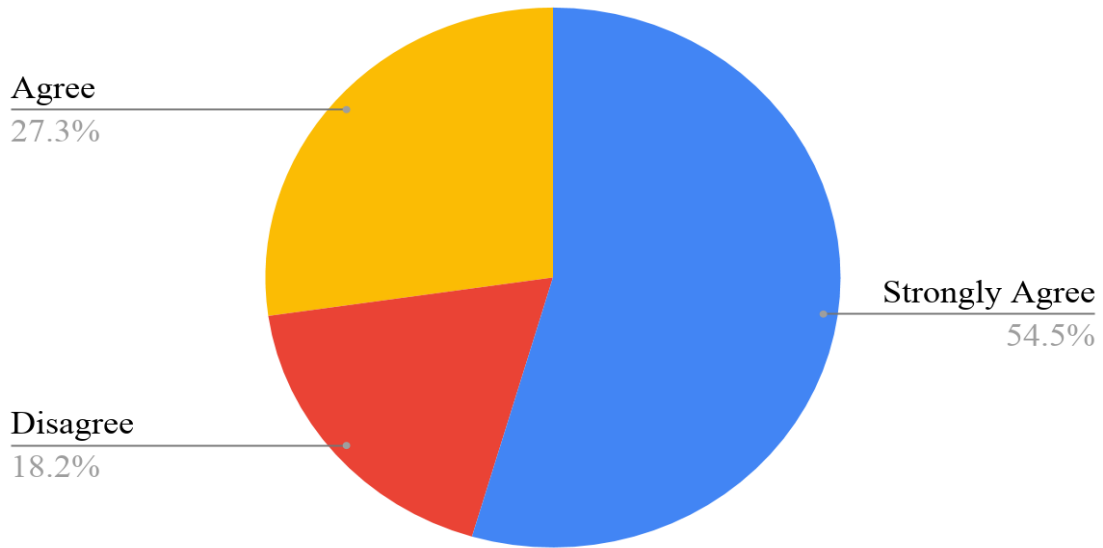
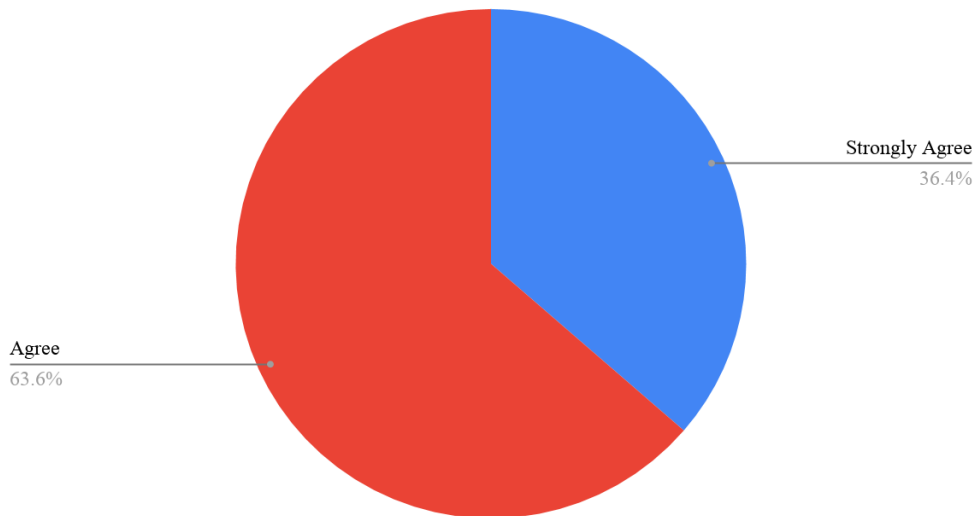


Chart 2

The plan is comprehensive of all stages of the agreement process.



Link to Prezi: <https://prezi.com/view/s4JYGnIEtle2B5e3eeAT/>