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# Business Plan

## Business Services Unit

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## **1.0 Introduction**

The purpose of this Business Plan is to convey “Who we are”, “How we do it”, “What we do” and “How we will measure ourselves” against our self-defined goals.

Two attitudes to planning need to be held in tension: on the one hand we need to be prepared for what may lie ahead, which may mean contingencies and flexible processes. On the other hand, our future is shaped by consequences of our own planning and actions.

Planning is a process for accomplishing purposes. It is a blue print of business growth and a road map of development. It helps in deciding objectives both in quantitative and qualitative terms. It is setting of goals on the basis of objectives and keeping in the resources.

A plan can play a vital role in helping to avoid mistakes or recognize hidden opportunities. Preparing a satisfactory plan of the organization is essential.

Planning helps in forecasting the future, makes the future visible to some extent. It bridges between where we are and where we want to go. Planning is looking ahead.

### **1.1 Preparing the Plan**

A comprehensive plan is to be developed so that clearly defined targets/goals are prepared in writing. Business Services will use the SMART method. A SMART objective is one that is:

**(S)** Specific

**(M)** Measureable

**(A)** Achievable

**(R)** Relevant

**(T)** Time-Bound

### **1.2 Identifying all the main issues, which need to be addressed:**

- Review past performance
- Focus on matters of strategic importance
- What are requirements
- What is length of plan and structure?
- Communication with customers – internal & external
- Identify shortcomings in the concept
- Implementation strategies
- Periodic review

A planned performance brings better results compared to unplanned one, and it is the goal of the Business Services Unit to plan, be predictable and successful. The following WSDOT Executive Orders are used as a guideline; Executive Orders E1032.01 of July 2008 and E1042.00 of July 2008; and will be the basis for our collaborative efforts.

## **2.0 Business Services Unit (BSU) Section Description**

BSU provides centralized management of Contracts & Delivery Support, Public Disclosure Requests, Policy & Procedures, Information Technology, FTA Grant Administration and Office Management services.

## **3.0 Business Services Unit Vision**

Our team will work to promote an innovative, proactive and flexible culture for administering the daily business of workplace excellence and diversity that encourages creativity and personal responsibility, values teamwork, and always respects the contributions of one another and our customers. We will adhere to the highest standards of courtesy, integrity, and ethical conduct. We will collaborate with all stakeholders both internally and externally to deliver high quality and timely products.

## **4.0 Business Services Unit Team Mission**

Everything we do, we believe in using the industries best management practices, we believe reporting accurate information that is user friendly and simple to understand. The way in which we deliver the CRC Program is by implementing the applicable policies, processes, and procedures for contracts, public disclosures requests and our day to day interaction with the staff and our customers. We are the Business Services unit and we strive for efficient, cheerful, and prompt contributions that benefit the entire CRC team.

## **5.0 Business Services Unit Primary Responsibilities**

Business Service Unit primary responsibility, as part of the Program Management team, supports the planning and management of the CRC Program delivery. It accomplishes this through efficient and effective best management practices, program procedures, and production of timely and accurate information.

## **6.0 Business Services Unit Technical Assistance**

BSU offers technical assistance in the following areas:

- Consultant procurement processing (advertisements, submittal scoring etc.).
- Agreement development;
- Task Order development and management;
- Dispute Resolution Board (DRB) agreement processing
- Facilitate negotiations with consultants and WSDOT on contractual matters
- Rate negotiations with consultants
- Sub consultant review and approvals
- Internal control and agreement/task order compliance reviews
- Review and coordination clearinghouse for Personal Services Contracting ( PSC) review process;
- Consultant performance evaluations and process
- Consultant resolution/claims process management
- Facilitating legal review of agreements through coordination with Office of Attorney General (AGO);
- Management of the CRC Y-agreement database

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- Interface with WSDOT/ODOT Internal Audit
- Day to day administrative needs for the CRC Office
- Public disclosure needs for the CRC Program
- Facilities Management for the CRC offices
- Interoffice Safety Oversight

## **7.0 Business Services Unit Team Identification, Roles & Responsibilities**

The following is a general breakdown of the BSU functional areas and appropriate contacts for each area.

### **a. Business Services Manager – Michael Williams**

The Business Services Manager oversees Document Control, Policy & Procedures, PMP, Information Technology, Contracts & Delivery Support, Public Disclosure, and Office Management services, Information Technology Support. The Business Services Manager is responsible for:

- Monitoring work plans for Business Services activities to ensure performance to approved scope, schedule and budget.
- Administrator of the Continuity Of Operations Plan (COOP) for the WSDOT within the CRC Project.
- Managing the FTA grant through the Federal Governments Transportation Electronic Award Management System (TEAM).
- Providing leadership and guidance to Public Disclosure Team. Ensuring timely response to public disclosure requests.
- Overseeing regular updates to the Policy and Procedures Manual.
- Manages administrative staff at the Reception Area
- CRC Facilities Management for the office and coordinate efforts with the GEC Manager.
- WA representative for oversight and approval of CRC invoices.
- Approver of CRC Purchase-Card Transactions for day to day operations of the projects sundry items .
- Assisting the Program Manager in definition of project scopes, project staffing and consultant selection.

## **b. Technical Support**

### **Contract Delivery Support Manager – Doyle Dilley**

The Contract Delivery Support Manager (CDSM) is responsible for the overall consultant contracting needs of the CRC project. In consultation with the CRC project's Executive and Senior Managers, the CDMS provides expert advice, oversight and direction regarding acquisition, implementation and administration of the project's consultant contracts. The CDMS is responsible for:

- Establishing and/or implementing project processes and procedures that comply with state and federal consultant contracting policies and regulations.
- Coordinating project consultant needs with the WSDOT Consultant Services Office (CSO), other project partners and federal oversight agencies where applicable.
- Ensuring the efficient utilization of consultant resources.
  - Overseeing change management with regard to consultant contracts.

### **Office Manager – Vacant**

- Manages the administrative staff
- Supports the CRC staff with all administrative duties

### **Information Technology – SW Region IT Support**

- Supports the CRC staff with all IT related needs

### **Public Disclosure Lead – Clair Rourk Skinner**

- Manages all public disclosure requests for the CRC program

### **Policy & Procedures Lead – Gavin Oien**

The policy and procedures lead is responsible for:

- Annual review and update, if needed, of the Project Management Plan, and all sub-plans.
- Reviews and updates CRC policy and procedures with associated manuals.

## **8.0 Business Services Unit Measures of Success**

### **a. Key Objectives**

- The Department's overall approach to consultant procurement and administration is consistent statewide;
- Agreements and task orders are developed, reviewed and processed according to procedures established in the BSU Manual
- BSU database is maintained and updated as appropriate
- BSU staff is responsive to customer needs and concerns

- Provide expertise and guidance to work unit and specialty groups (within CRC) for consultant related matters

**b. Critical Success Factors**

- Key CRC personnel understand BSU functions, objectives, and processes
- BSU maintains excellent business relationships and open lines of communication with internal and external customers

**c. Metrics (What is measured and how)**

- Planned CRC Procedure Manual updates occur on regular intervals
- Products delivered on time as evidenced by “tracking system” dates (ads, agreements, task orders)
- Monthly, quarterly, semi-annual and annual reporting

**d. Communication**

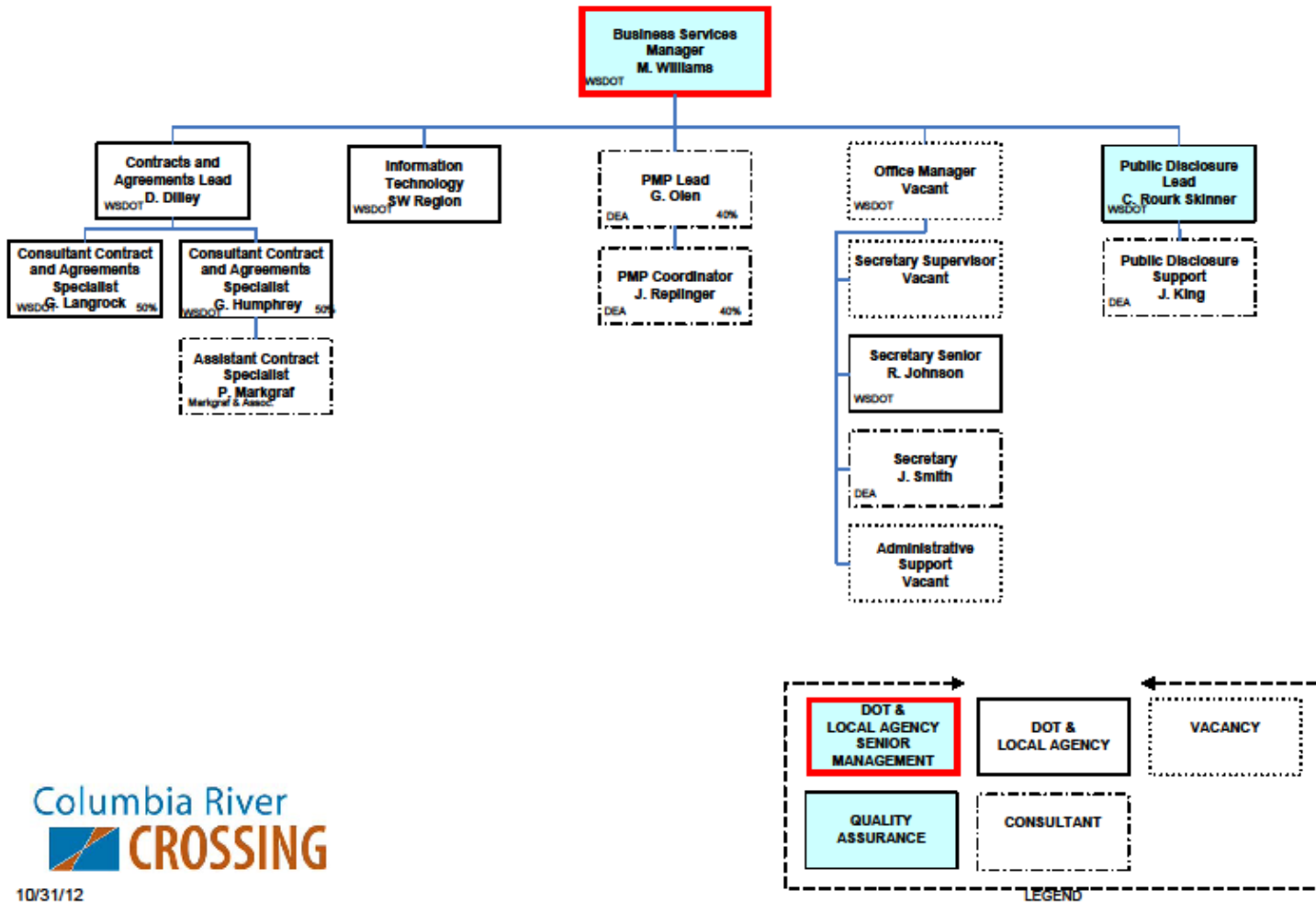
- Maintain agreements database for effective use by CRC and external customers.
- Communicate with customers and staff in person or via email, telephone, formal meetings and formal correspondence as appropriate to ensure efficient and predictable delivery of services, and needs.





# 10.0 Business Services Unit Organizational Structure

Columbia River Crossing Business Services Team



10/31/12