1. Account Management Team

Discuss your plan, team assignments and responsibilities for the account management team. Include any information required from CWOPA that is needed to begin implementation.

- Contractor Transition Plan
  - Begin contractor transition
  - Begin PeopleClick customization
  - Train CAI account managers on newly defined process
  - Define immediate priorities/needs for (1) new placements and (2) transition of existing staff
  - Define communications and escalation plan
  - Define exception processing
  - Assign account managers to balance workload
  - Implement the single, common workflow
  - Possible manual process during transition, if needed

- Account manager assignments
  - Each agency will have a single CAI point of contact
  - Most account managers will support multiple agencies
  - Final assignments will depend on volume
  - After transition (peak demand), assignments may change
  - Account manager will work closely with on-site managers

- Responsibilities
  - Evaluate requisitions (assist CWOPA agencies as needed)
  - Ensure appropriate screening of all candidates
  - Ensure placement occurs smoothly
    - Proper orientation for all newly placed resources
    - All CWOPA paperwork complete (PO, background check)
    - Coordinate start date, user-ID, etc with agency
  - Focus on requisition logistics
  - Conduct satisfaction survey using PeopleClick
  - Monitor and manage service level agreement (SLA)

- Needed from CWOPA
  - Agency contacts (including comptrollers and hiring managers, if applicable)
  - Number of requisitions (transition and new) by agency and location
2. On-site Management Team

Discuss your plan to provide on-site resources, including the number of managers, suggested locations and responsibilities. Include any information required from CWOPA that is needed to begin implementation.

- Suggested staffing
  - Deployment depends on number of positions and start date for each agency
  - On-site management team will be staffed commensurate with the volume of requisitions created by the Commonwealth
  - Acknowledge “Big Four” are, L&I, PENNDOT, DPW, DOR
  - Additional on-site managers available, as defined in proposal (app. 50:1 ratio)
  - On-site managers will focus on HR, people management while account managers will focus on requisitions

- Attributes of an on-site manager:
  - Ensures staff and knowledge transition (in- and out-bound)
  - Works at agency office, with his/her own desk space
  - Coordinates HR issues (vacation, performance issues, etc.)
  - Supports multiple bureaus within the agency

- Needed from CWOPA, for each agency with an on-site manager:
  - Single point of contact (preferred) for each agency
  - Current positions and ending dates, etc.
  - For our on-site manager:
    - Office space with access to privacy for sensitive/confidential discussion
    - PC with email and Internet connectivity
    - Vendor badge for access to work site
3. Web-based Requisition

Discuss the timeline and requirements for implementing the web-based tool, including any responsibilities CWOPA may have in providing data to help implement the tool.

The italicized items describe CWOPA responsibilities over the 8-week period.

- Discovery – weeks 1-4
  - Kick-off meeting (DGS work group)
  - Data Gathering (CAI and DGS)
  - Verify Workflow (CAI and DGS)
  - Data Collection (CAI)

Focus during this time is taking the job categories, workflow, SLA and other information from the RFP and the proposal and matching it to PeopleClick functionality. We anticipate multiple meetings during this time period.

We also request a DGS person as our primary point of contact and decision-maker.

- Construct – weeks 4-6
  - Load data/configure site
  - QA
  - Reload data based on issues
  - Final Review

We expect DGS and work group members to practice using the software, as a pilot UAT. During this time we will also need DGS input for workflow requirements, to appear in soft copy as process documentation available from the web site.

- Delivery – week 7
  - Rollout Communications Plan
  - Documentation
  - Training

This week involves rollout and training, using a schedule created by DGS.

- Production – week 8
4. Implementation Plan

Review your proposed implementation plan, timeline, external requirements and dependencies to ensure the plan fits with CWOPA requirements and any CWOPA responsibilities are communicated.

Dates will change; we also need answers to questions in this document. Here are the major topics to be resolved:

- Transition approach:
  - Big bang (all agencies)

- Invoice/billing requirements
  - Standard format recommended, to be used by all agencies
  - Standard PeopleClick access for agencies
  - Electronic timesheets, including electronic approvals
    - Acceptance of time = “acceptance of services” (RFP Att. H)
    - This also = “tasks completed during the billing period”
  - Standard billing cycle

- Specific training requirements
  - Assume all training will occur in Harrisburg
  - Regional training will occur as necessary and mutually agreed

- Identify executive sponsor and DGS project manager
5. Current contractors

Review the list of contractors currently working on CWOPA projects, identify categories which these contractors fall into, and identify adjusted rates that will be billed according to your BAFO pricing going forward.

- CAI will:
  - Match current contractor positions to new contract categories, based on information provided
  - Review matching list exceptions with DGS
  - Contact incumbent vendors to facilitate transition
  - If necessary, we will obtain replacement staff from other vendors

- Needed from CWOPA
  - List of all contracts with details on their assignment, including billing rate
  - Decision on desired timing of staff rollover
  - Enforcement of revised position categorizations with existing vendors
  - Exception process for positions outside the new contract

- DGS responsibilities:
  - Direct all current vendors on following the new process
  - Direct agencies to follow the process
  - Handle contract ending penalties and/or special agreements, if any