

Modernization Program Staff Management Plan

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Program Overview

The Employment Department's Modernization Program is a multi-year initiative focused on transforming the agency's business processes and core technology systems. Computer systems supporting receipt of unemployment insurance taxes, payment of unemployment insurance benefits, and delivery of employment services will be replaced. Further, business processes will be transformed to take advantage of opportunities and benefits available through new system capabilities.

Document Purpose

This plan details the Modernization Program's human resource needs, and describes the process to identify and acquire key resources to support modernization projects. This plan includes:

- Staff management approach
- Roles and responsibilities that will be necessary for the program
- Planning and hiring strategy for when and how modernization employees will be recruited
- Organizational chart showing reporting relationships, as well as structural chart displaying functional work groups
- Staff orientation and training plan
- Staff release and transition

Staffing processes must be flexible to allow for fluctuations in the number and type of agency staff or contracted resources assigned. This plan will be updated as significant adjustments are made in response to staffing needs.

Vendor onboarding, orientation, and release will also be conducted. These processes are documented within the program's procurement and contract management plans.

Document Audience

This document is intended for these primary audiences:

- **Program sponsors and steering committee members** – to understand the processes that will be followed, to plan for staffing budget needs, and for awareness of possible staffing resource needs that could impact operations for the agency. Program sponsors and steering committee members also have a responsibility to ensure processes are appropriate and are enforced.
- **Internal and external oversight entities** – to monitor whether appropriate processes are in place and continue to be followed.
- **Program and project team members and vendor staff** – to understand the processes that will be followed, to use for orientation and release of staff, and to understand their expected roles and responsibilities. Vendors and their assigned resources may use this plan as a guide to understand how agency employees are being managed, and create a partnership based on common expectations and guidelines.
- **Agency employees** – to reference for general awareness.

Risks, Assumptions, and Constraints

The Modernization Program is currently staffed with a mix of permanent positions and job rotations. Future Modernization Program staffing may include permanent and limited duration positions, as well as job rotations and vendor-contracted resources. The agency has received, and will continue to seek, position authority to fill positions within operations that are vacated from the business and shared service areas as a result of employees moving to the modernization team.

RISKS

Risks related to staff management and other project management process groups are described and managed through the program's risk and issue process. See the program's risk management plan for further details on the risk and issue process.

ASSUMPTIONS

- Staffing needs may change as we continue further planning with solution vendors, understand their approach, and prepare for project implementation.
- If modernization positions are filled by current agency staff, there may be temporary impacts in operational service levels or delivery as newly-hired employees filling these vacancies are trained.
- Highly skilled and knowledgeable employees will be involved with Modernization Program; therefore, employees that fill positions vacated by these existing agency employees will be trained to gain expertise and experience.
- Operations/business units will provide expanded team members, such as subject matter experts, trainers, instructors, and testers, as needed, in support of modernization projects.
- In order to meet operational needs, business and shared service area leaders will recruit for and fill positions that are vacated when employees join the modernization team.
- Although the agency has requested permanent positions due to the multi-year need for modernization staffing, we recognize the need for most of these positions to end with the successful implementation of the program.
- It is not the intent of the agency to decrease staffing levels as a result of the successful completion of the Modernization Program and projects.
- Positions and staffing levels necessary to support Employment Department operations will be evaluated for adequacy as new business processes and systems are deployed.
- The agency is committed to retaining employees who have contributed to our success.

CONSTRAINTS

- The Oregon Legislature authorizes positions for the Modernization Program after evaluation of the agency's project plan and supporting budget request. If necessary positions are not approved by the legislature, resources must be provided from the agency's operational areas or through a vendor contract which could impact project schedule, budget, and deliverables.

- The agency must ensure adequate service levels to the public over the course of the Modernization Program.

Roles and Responsibilities

Significant roles and responsibilities involved in these processes are described below.

Figure 1 – Roles and Responsibilities

Role	Responsibilities
Modernization Sponsor (Modernization Director)	Develops staffing management and hiring strategy.
Modernization Program Manager	Supports the Modernization Sponsor and managers in developing the staff management strategy by ensuring resourcing needs are identified to perform work required by modernization projects. Develops and maintains the staff management plan, including roles and responsibilities.
Modernization managers	Supervises teams comprised of business, systems, or project experts responsible to configure new system solutions to meet the agency's needs. Recruits and retains qualified employees, and ensures that all staff have relevant training opportunities, and adjusts/distributes resources as needed to meet program goals. Monitors staff performance standards and conducts annual performance reviews and work plans. Coaches and mentors staff. Ensures staff adhere to program and project management standards, principles, and planned outcomes for modernization projects.
Modernization Quality and Risk Analyst	Monitors and facilitates management of staffing-related risks. Conducts quality control reviews of staff management processes.
Independent quality management services (iQMS) vendor	Conducts independent quality control reviews of staff management processes.

Role	Responsibilities
Agency Human Resource Director	<p>Develops and manages the agency’s staff management strategy and processes within the broader state construct provided by the Department of Administrative Services Chief Human Resources Office, and collaborates with the Modernization Executive Sponsor, Modernization Sponsor, and members of the modernization team to execute the processes within this plan in alignment with the agency’s strategy and processes.</p> <p>Coordinates with the Modernization Sponsor and Modernization Program Manager to develop appropriate staff management processes.</p> <p>Provides services to support staff development, monitoring, and reporting.</p> <p>Collaborates with DAS Chief Human Resource Office on staff classifications, policies, procedures, and other staff matters with the Modernization Executive Sponsor.</p>
Department of Administrative Services’ Chief Financial Office (DAS CFO)	<p>Provides objective and accurate financial information to state leaders and the public for more efficient use of state resources.</p> <p>Reviews, evaluates, and approves program and project documentation to ensure funding is adequate, recommends approval for spending authority, and ensures policies are in alignment with the Governor’s priorities.</p> <p>Meets with members of the modernization team and agency staff regularly regarding modernization information and reports.</p>
Department of Administrative Services’ Chief Human Resource Office (CHRO)	<p>Provides direction and services to promote a stable and qualified workforce in Oregon state government all the while reflecting the state’s values and accountability, equity, excellence and integrity.</p> <p>Oversee state agencies’ human resources functions: Classification and Compensation, HR Policy, Executive Recruitments, Labor Relations, and Workforce Development.</p>

Staffing Approach

The staff management approach consists of the following five elements: planning, acquisition, training, tracking, and transition.

The modernization team is comprised of both agency and contracted resources. The agency is committed to providing opportunities for current employees to participate on the modernization team whenever feasible. We will evaluate the required skills and availability of resources for each position to determine the appropriate recruitment strategy. The agency will contract with vendors to implement their solutions and configure them to meet the agency’s needs. The State of Oregon’s oversight policies also require the agency to contract for iQMS. It may be necessary to augment with contract staff to attain specific skill sets or capacity not available within the agency. The process for procuring vendors, equipment, hardware/software, and licenses is outlined within the program’s procurement plan.

MODERNIZATION PROGRAM TEAM

The modernization team is comprised of agency employees with technical, project management, and business subject matter expertise. This core team will participate for the life of the program and will be involved in, or assist with, all modernization projects. This team will provide services to underlying projects, ensuring consistency in practices and ensuring dedicated resources are available to support the administrative, oversight, and operational needs for the program and its projects.

MODERNIZATION PROJECT TEAMS

For each specific modernization project, a team will be established to focus on delivery and execution of the project work. The project team will be comprised of dedicated project managers, business analysts, technical staff, solution vendor staff, trainers, and expanded team members.

OPERATIONAL AND ADMINISTRATIVE POSITIONS (EXPANDED TEAM)

Agency operational staff will be brought onto project teams as expanded team members at various times throughout a project to provide subject matter expertise, perform user-acceptance testing, and other activities. These will not be dedicated positions for the Modernization Program or projects; however, additional capacity must be created to allow for this additional operational role in support of the Modernization Program. Further, additional administrative support will be necessary to support the Modernization Program within the agency. To create this capacity, additional position authority and limitation may be requested.

VENDOR TEAMS

Solution vendors will have their teams that partner with the agency's team to implement and configure solutions to meet the agency's needs. Vendor staff will be tasked with transferring knowledge to Employment Department staff throughout the different projects. Vendor staff will also be expected to partner with the agency in delivering training, developing materials to prepare staff, and executing change management activities.

Vendors may also be used to provide specific skillsets or expertise in the following areas, including but not limited to:

- Requirements and alternatives analysis
- Change management
- System integration
- Technical staff augmentation
- Project management

Position Funding

Staffing is an integral component of the state's biennial budget development process. Additional position authority and expenditure limitation necessary to execute the Modernization Program and projects will be sought through established budget and management processes.

The initial position and funding needs estimates have been developed based on other state agency experiences, agency knowledge and planning to date, and collaboration with other states who have modernized. These estimates will be refined during the procurement process, working with solution

providers to finalize staffing needs and timing of resources to support system implementation. Adjustments for staffing needs will be sought through Emergency Board or legislatively-delegated executive branch budget processes, if and as necessary.

Expanded team members will contribute to the project from positions already existing in the agency's operating budget. When an operations position becomes vacant due to an employee being hired by the project, the business or service area may need to fill that position to continue core business functions. As the project comes close to completion, the agency will coordinate how to relieve job rotation assignments and place employees back in the respective operations areas per state guidelines and collective bargaining agreements and business needs.

Further details about the program budget and funding can be found within the program's budget management plan.

Staff Planning

Throughout the duration of the Modernization Program, staffing needs will be planned and position authority requested. Resources will be required to provide the following services and functions for the program to support all modernization projects:

- Governance and leadership
- Program planning and process standards
- Budget management
- Contract management
- Communications and stakeholder management
- Change management (organizational)
- Quality management
- Scope management
- Schedule management
- Risk management
- Reporting
- Project management support
- Staff supervision

As specific projects are initiated for the program, staffing needs will be re-assessed and resources will be acquired to support each specific project's needs. Resource needs will be analyzed after considering the project's scope, timeline, and needed skillsets and expertise. Subject matter expert positions dedicated for modernization projects will be filled with agency employees who are best suited for the position based on their knowledge and expertise needed for the project. Expanded team resources will also be identified and assigned to assist with the project activities such as, testing and training. Anticipated roles include:

- Business analysis and coordination
- Business subject matter expertise
- Training development, coordination, and delivery
- Quality assurance and test coordination
- Technical staff to design and develop system solutions
- Strategic technical guidance for system and data architecture, infrastructure, and security

The number and type of resources projected for each project will be based on solution vendors input, experience and expertise from program leadership, learning from other Oregon and national initiatives, and information gathered during a feasibility study conducted with the Information Technology System Center¹ (ITSC) between November 2016 and January 2018.

As planning for modernization projects continues, budget projections will be updated to reflect adjustments to staffing needs. Additionally, these initial staffing projections will also be validated during contract negotiation with successful solution vendors.

This plan, along with the program's schedule management plan, and individual program and project schedules, will be used to validate that staffing is appropriate for planned activities. The modernization team will continually evaluate whether to fill positions on a full-time basis or fill them only as needed, for example, adding more resources during peak workload periods. The modernization team will evaluate staffing needs as projects progress, and it is expected that some positions initially identified may be used to fill different combinations of roles within their classifications. Some positions may perform roles both at the program level and for a specific project.

Organizational and functional structure diagrams illustrate positions and reporting relationships. These diagrams are maintained separately and are updated regularly as part of the resource acquisition and transition processes. These diagrams are used as tools to communicate roles, responsibilities, and reporting relationships. See Appendix A for an example of the Modernization Program's organization structure.

A registry of modernization team positions is maintained by the Modernization Support Specialist to record the classification, position title, position number, and the biennium in which the position authority was established. See Appendix B for an example of the Modernization Program's position registry.

Modernization Team Roles and Responsibilities

The modernization team is comprised of employees representing the core business and technical functions for the agency, as well as contracted staff. Specific roles and responsibilities may change slightly as program and project planning continues and roles become more defined. A separate document outlines the roles and responsibilities of the modernization team.

Acquisition and Onboarding

AGENCY EMPLOYEES

Agency employees are recruited, hired, and managed according to State of Oregon policies, the agency's hiring practices, and current Collective Bargaining Agreements. Agency positions are filled using a variety of hiring processes, with a preference towards competitive and inclusive processes for permanent and job rotation work assignments. Direct appointments may be the best recruitment strategy for certain key positions based on the skills required.

¹ The Information Technology Support Center (ITSC) is a non-profit organization housed in the National Association of State Workforce Agencies, funded by grants from the U.S. Department of Labor, and governed by state unemployment insurance and workforce leaders. The ITSC has worked with other states on their modernization efforts and is knowledgeable of unemployment insurance models and practices nationwide.

Considerations given to the specific acquisition approach include, but are not limited to, failed recruitment, critical need for agency operations and timing, specialized or unique skill at a professional level, availability of staff with appropriate experience. Though the preference is to recruit for project positions, job rotations, direct appointments, and contracted staff may be a more effective and appropriate method in certain cases.

As the hiring process begins, Modernization Program leadership will coordinate with agency leadership to identify the best acquisition strategy for the roles being filled at that time.

VENDOR STAFF

Vendor staff are acquired in accordance with State of Oregon contracting policies, procedures, and agreements. Vendors are expected to manage their own staff and ensure they remain in compliance with contractual agreements. Further information on vendor onboarding is included within the program's contract management plan.

ONBOARDING

Project onboarding is provided as staff join the Modernization Program and project teams. A modernization manager provides onboarding to new employees or contract staff, including the following:

- Program/project background and documentation
- Program/project status
- Job duties and expectations (agency employees)
- Vendor contract commitments and behavioral (work environment) expectations (vendor employees onsite at Employment Department locations)
- Introduction to modernization team members and other agency staff
- Overview of the facility (if necessary)
- Overview of program/project processes
- Review of confidentiality and security requirements
- Review of relevant agency policies and procedures

See Appendices C and D for examples of the program's employee onboarding checklist and vendor orientation checklist.

Training

The Modernization Program's supervisory positions determine staff training needs that are in addition to trainings that all employees must undertake. Supervisors may use a skills gap analysis template to assist in assessing where employees may need further training. See Appendix E for an example of the skills gap analysis template.

Training may include on-the-job training, computer-based training, and/or instructor-led training. Training is tailored to the needs of the employee. Cross-training is implemented, where possible, to minimize disruption resulting from any staff turnover. Team members are also encouraged to pursue educational opportunities on their own and obtain approval from their supervisor.

Management and Tracking

The Modernization Program's supervisory positions are responsible for day-to-day management of agency staff. Day-to-day management includes establishing and modeling a respectful, courteous, inclusive work environment, completing administrative tasks such as approving leave and time sheets, assigning work, providing performance evaluations, addressing performance issues, and providing recognition and promotions. Team leads and lead workers may assist in day-to-day operations, including assignment and review of work.

All staff resources are tracked within the modernization team registry that records the names, roles, and start and end dates for both agency and vendor personnel. The registry is maintained by the modernization executive assistant and is updated as part of the staff acquisition and transition processes. See Appendices F and G for an example of the team registry and vendor team registry.

Transition

TRANSITION

As Modernization Program and project team employees' transition off projects, their manager will re-assign the departing employees' responsibilities and ensure any pending work is timely transferred to other modernization employees. When possible, knowledge transfer will be performed before an employee transitions from the team.

REPLACEMENT

Normal state hiring processes will be followed when replacing permanent or job rotation modernization employees. Contract staff are replaced in accordance with the provisions in their respective contract and statement of work.

TRANSITION AT PROJECT COMPLETION

As modernization work is completed and positions are no longer required for the project, employees will be transitioned according to their method of acquisition. Contractors will leave projects as identified in their corresponding contracts.

Modernization sponsors and the agency's Human Resources Director or designee will determine the appropriate methods for transitioning agency employees and positions back to business and support service areas. In some cases, project positions may be ended as the roles are no longer necessary, and others may need to continue in support of ongoing system maintenance and operations, thus transition plans for those positions will be needed. Staff transition plans will be developed during the project as post implementation maintenance and support needs and staffing levels are known.

Document Maintenance

This document is maintained by the modernization team and will be reviewed and updated annually or when major revisions are necessary. Periodic process reviews assess the effectiveness of program plans and processes. Any identified changes or improvements are incorporated in program processes and reflected within revisions to these program plans. All program plans are stored within the program's file share here: <\\WPOEDFILL04\014\Shared\00 Program Management\Program Plans\>.

Version	Date	Author	Change Description
V1.0	12/2018	Jennifer Hannan, Modernization Program Manager Mike Smith, Chief Financial Officer Sharon Tietsort, Human Resource Director	Initial version of the document.

Approving Authorities

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Eric H Smith (Dec 20, 2018)

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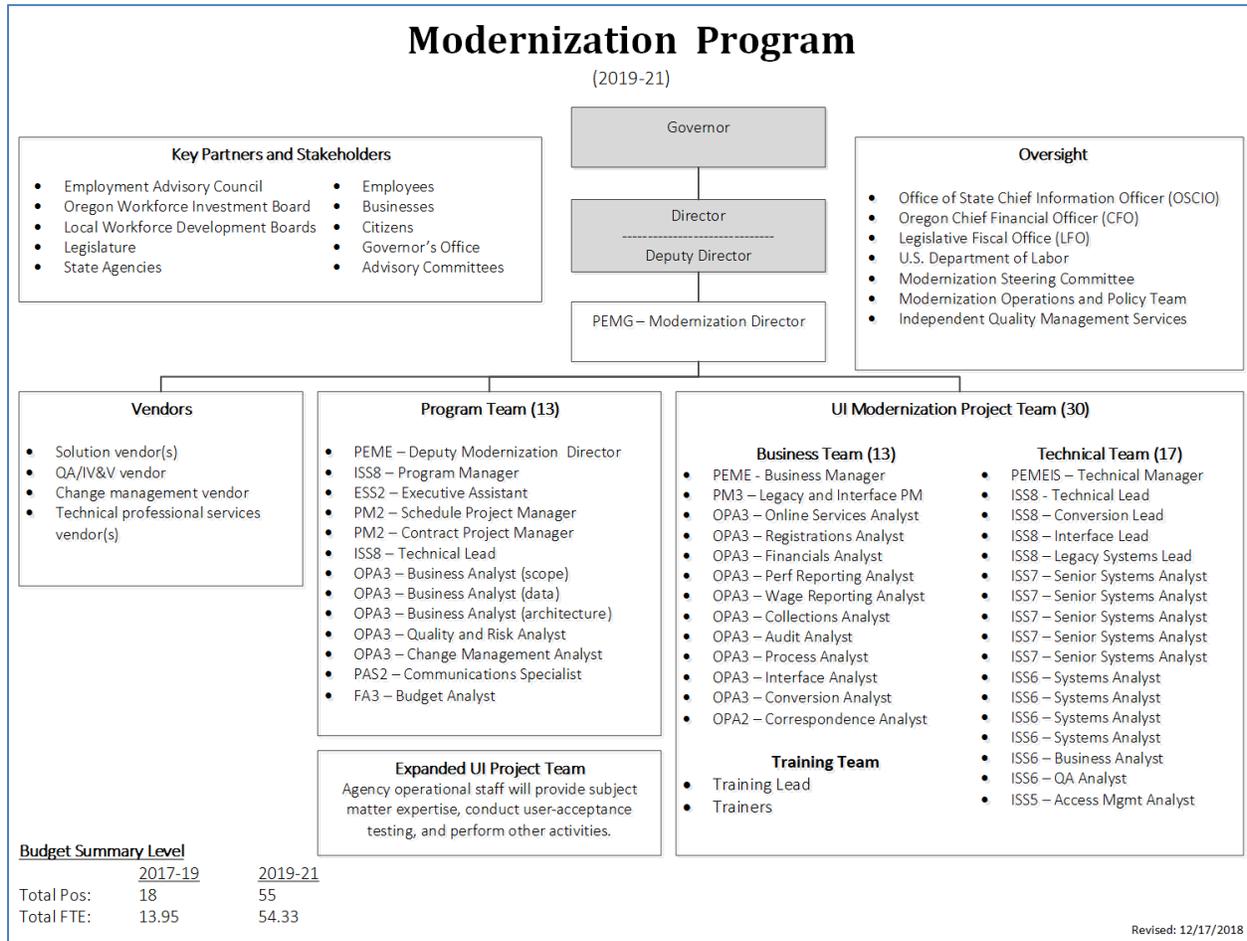
Sharon Tietsort (Dec 20, 2018)

Sharon Tietsort, Human Resource Director

Date

Appendix A – Modernization Organizational Structure

Note that this organizational structure will be updated as additional projects are initiated.



Appendix B – Modernization Position Registry

The modernization position registry records creation or the request of modernization positions, along with the history of when positions were established and their corresponding position number for tracking. This registry will be updated as new positions are added or changed.

Classification	Position Title	Established	Position #
Modernization Program Team			
PEMF	Modernization Director	2015-17	
OPA3	Modernization Business Analyst	2015-17	
OPA3	Modernization Business Analyst	2015-17	
OPA3	Modernization Business Analyst	2015-17	
ISS8	Modernization Program Manager	2017-19	
ESS2	Modernization Support Specialist	2015-17	
OPA3	Modernization Quality and Risk Analyst	2017-19	
OPA3	Modernization Change Management Analyst	2017-19	
PAS2	Modernization Communications Specialist	2017-19	
PM2	Modernization Schedule Project Manager	2017-19	
PM2 ²	Modernization Contract Project Manager	2017-19	
PEME	Deputy Modernization Director	2017-19	
ISS8	Modernization Technical Lead	2017-19	
FA3	Modernization Budget Analyst	2017-19	
		Total Program	14

Modernization Unemployment Insurance Project Team

PEME	Business Team Manager	2019-21	TBD
PM3	Project Manager – Legacy and Interfaces	2019-21	TBD
OPA3	Business Analyst – Online Services	2019-21	TBD
OPA3	Business Analyst – Registrations	2019-21	TBD
OPA3	Business Analyst – Financials	2019-21	TBD

² This position was originally requested in 2017-19 as a PCS3. After further reevaluation of the program needs, it was determined that the role and responsibilities would focus more on contract administration than on procurement. This classification also provides flexibility in other responsibilities that could be assigned.

Classification	Position Title	Established	Position #
OPA3	Business Analyst – Performance Reporting	2019-21	TBD
OPA3	Business Analyst – Wage Reporting	2019-21	TBD
OPA3	Business Analyst – Collections	2019-21	TBD
OPA3	Business Analyst – Audit	2019-21	TBD
OPA3	Business Analyst – Interfaces	2019-21	TBD
OPA3	Business Analyst – Conversion	2019-21	TBD
OPA2	Business Analyst – Correspondence	2019-21	TBD
TDS2	Training Lead	2019-21	TBD
PEMEIS	Technical Team Manager	2019-21	TBD
ISS8	Project Technical Lead	2019-21	TBD
ISS8	Conversion Lead	2019-21	TBD
ISS8	Conversion Lead	2019-21	TBD
ISS8	Legacy Systems Lead	2019-21	TBD
ISS7	Senior Systems Analyst	2019-21	TBD (x5)
ISS6	Systems Analyst	2019-21	TBD (x4)
ISS6	Business Analyst Technical Writer	2019-21	TBD
ISS6	Quality Assurance Team Lead	2019-21	TBD
ISS5	Access Management Analyst	2019-21	TBD
		Total Project	30
		Total Overall	44

Appendix C – Employee Onboarding Checklist

Modernization Team – Manager’s Employee Onboarding Checklist

NEW EMPLOYEE INFORMATION	Name:	Start Date:
	Position:	Manager:
	Office/Section: CO/ Modernization	NEW Colleague:

	Task	Status
PRE-FIRST DAY	Send official offer letter to new employee (Director)	<input type="checkbox"/>
	Make a welcome call to new employee (Director)	<input type="checkbox"/>
	Submit a Personnel Action to OHR and complete a NURF for network and email access (Lori)	<input type="checkbox"/>
	Send customized welcome email – S:\00 Program Management\Staffing\Onboarding (Lori/Director)	<input type="checkbox"/>
	Prepare workspace including computer, phone, chair, and office supplies (Lori)	<input type="checkbox"/>
	Arrange for temp key card for use during first week with facilities and schedule pic for permanent key card (Lori)	<input type="checkbox"/>
	Assign a NEW Colleague (Director)	<input type="checkbox"/>
	Announce the hire to current staff via email or during meeting (Director)	<input type="checkbox"/>
	Schedule time to meet with the employee at start and end of first day (Director/Lori)	<input type="checkbox"/>
	Schedule an office activity to welcome the new employee (Lori)	<input type="checkbox"/>
	Start to develop the initial learning plan for employee (Director)	<input type="checkbox"/>
	Send calendar invites for team meetings, Donut Day, etc. to new employee (Lori)	<input type="checkbox"/>
	Add employee to Outlook calendar sharing properties (Team)	<input type="checkbox"/>
	Update Org chart and position description header in prep for day one with new employee (Lori)	<input type="checkbox"/>
	Assign employee to manager e-timesheet group (Director)	<input type="checkbox"/>
Schedule 1:1 updates with employee (Lori)	<input type="checkbox"/>	
FIRST DAY	Greet the employee at the agreed upon location (Lori)	<input type="checkbox"/>
	Employee signs initial Commitment to Confidentiality Form (Lori)	<input type="checkbox"/>
	Initial one-on-one with employee (Director and Program Manager) Meet and share the following: <ul style="list-style-type: none"> • Job duties, responsibilities and expectations with review of position description and organizational chart (Director) 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

	<ul style="list-style-type: none"> Discuss work hours/schedule, breaks, lunch, leave accruals & requests, absences/notifying supervisor, office security, inclement weather procedures (Director) Discuss and review program/project background and documentation (Program Manager) Discuss and review program/project status (Program Manager) Overview of program/project processes Review relevant agency policies and procedures (Director) 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Complete New Hire paperwork with employee (I-9, self-ID form, direct deposit, W-4, emergency contact form – Director or HR)	<input type="checkbox"/>
	Review security, emergency and safety procedures for the building (Lori)	
	Introduce employee to their new colleague, the team and key contacts on 2 nd floor such as admins and steering managers (Lori)	<input type="checkbox"/>
	Tour of central office building (Lori)	<input type="checkbox"/>
	Provide time for new employee to settle into workspace – ensure computer access and passwords enable entry to system (Lori)	<input type="checkbox"/>
	Send employee the new employee checklist and instruct on enrolling in New Employee Certification in iLearn to complete First Day Training (Lori)	<input type="checkbox"/>
	Email employee manager contact info in outlook (Director)	<input type="checkbox"/>
	Update DAS directory, team phone list and team schedule with new employee information (Lori)	<input type="checkbox"/>
	End the day with a one-on-one meeting to debrief day (Director and/or Program Manager)	<input type="checkbox"/>
FIRST WEEK	EdWeb overview and navigation (Lori)	<input type="checkbox"/>
	Network drives, folders and structures overview (Martin/Jennifer)	<input type="checkbox"/>
	Modernization mailbox/calendar overview (Lori)	<input type="checkbox"/>
	Star room mailbox/calendar overview (Lori)	<input type="checkbox"/>
	Go over team standards (Jennifer)	<input type="checkbox"/>
	Provide meaningful work for the employee – either training or work related to position, i.e. reading program and project plans as necessary (Program Manager)	<input type="checkbox"/>
	Set up protected time for employee to complete the NEW Your First Week curriculum on iLearn (Lori)	<input type="checkbox"/>
	Schedule Ergo (Lori)	<input type="checkbox"/>
	Schedule 30 minutes for represented staff to meet with Union Steward (Lori)	<input type="checkbox"/>
	Schedule desk chair consultation (done -Commercial Business Solutions, Lori)	<input type="checkbox"/>
	Meet with employee mid-week to set first month goals (Program Manager)	<input type="checkbox"/>
	Meet with employee at the end of the week to check-in (Program Manager)	<input type="checkbox"/>
	Secure Printer set up (Lori)	<input type="checkbox"/>
	Electronic Time procedures – e-Time & Outlook calendaring (Lori/Martin)	<input type="checkbox"/>

FIRST MONTH	Provide position related training (including driving training if applicable)	<input type="checkbox"/>
	Give performance feedback early and often to the new employee	<input type="checkbox"/>
	Discuss individual workstyle and preferences	<input type="checkbox"/>
	Verify new employee completes NEW Your First 30 Days curriculum	<input type="checkbox"/>
	Schedule new employee to attend OED Connections (Lori)	<input type="checkbox"/>
	Check in regularly to ensure that the employee continues to assimilate their knowledge and capabilities	<input type="checkbox"/>
	Schedule meetings with key players related to the position (Lori/Renee will schedule meet and greet/program learning meetings)	<input type="checkbox"/>
	Employee telework agreement and NURF for VPN access if appropriate and needed for role	<input type="checkbox"/>
	Employee sign up for Think. Learn. Adapt. Training	<input type="checkbox"/>
	Employee sign up for Diversity training	<input type="checkbox"/>
	Feasibility Study & Enterprise Alignment customer journey maps and other materials briefing/overview (Martin)	<input type="checkbox"/>
FIRST 90 DAYS	Complete initial performance review (90 day)	<input type="checkbox"/>
	Review performance objective and set individual development goals	<input type="checkbox"/>
	Weekly one-on-one meetings with new employee	<input type="checkbox"/>
	Provide training, as needed, to help the new employee understand internal systems, general operating practices and obtain other information or skills required in the performance of his or her job	<input type="checkbox"/>
		<input type="checkbox"/>
FIRST YEAR	Provide training to build competencies and fill any skill gaps	<input type="checkbox"/>
	Assess the performance of the employee periodically – formally and informally – and provide feedback	<input type="checkbox"/>
	Meet regularly – at least twice a month	<input type="checkbox"/>
	Complete the 6 month or end of trial service performance review	<input type="checkbox"/>
	Complete the one year performance review	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Appendix D – Vendor Onboarding Checklist

Modernization Team – Manager’s Vendor/Contract Employee Onboarding Checklist

VENDOR INFORMATION	Name:	Start Date:
	Task	Status
PRE-FIRST DAY	Prepare workspace including computer, phone, chair, emergency guide notebook and office supplies (Lori)	<input type="checkbox"/>
	Arrange for key card for access to building (Lori)	<input type="checkbox"/>
	Prepare welcome packets with the following information (Lori): <ul style="list-style-type: none"> • Building map and conference room locations/info • Parking map/locations • Ethics/Conflict of Interest law information • Commitment to Confidentiality form (sign and return) • Emergency Contact form (complete and return) • Modernization team list and contact information 	<input type="checkbox"/>
FIRST DAY	Greet the vendor/contract employee at the agreed upon location (Lori or Jenny)	<input type="checkbox"/>
	Introduce vendor/contract employee to the team (Jenny)	<input type="checkbox"/>
	Meet to discuss and share the following: (Contract Administrator or Modernization Manager) <ul style="list-style-type: none"> • Vendor contract commitments and behavioral (work environment) expectations • Discuss hours/schedule and inclement weather procedures • Discuss and review program/project background and documentation • Discuss and review program/project status • Overview of program/project processes • Review relevant agency policies and procedures 	<input type="checkbox"/>
	Review security, emergency and safety procedures for the building and provide tour (Lori)	<input type="checkbox"/>

Appendix E – Skills Gap Assessment Template

Role:

Resource name:

Required Skills	Skill Level Required				Actual Skill Level	Skills Gap Mitigation Plan
	Proficient	Competent	Learner	Novice		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Appendix F – Modernization Team Registry

The modernization team registry records the individuals who worked on the modernization team.

Name	Role	Start Date	End Date

Appendix G – Modernization Vendor Team Registry

The modernization vendor team registry records the contracted staff for modernization.

Name	Company	Contact Info	Role	Start date	End Date

Modernization Staff Management Plan V1.0

Final Audit Report

2018-12-20

Created:	2018-12-20
By:	Lynn Kneeland (lynn.kneeland@oregon.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAA7TtFcRtFITBj3T155tPO6dgmq6LJMiGg

"Modernization Staff Management Plan V1.0" History

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