

RECOMMENDATIONS	Issue Area	Deliverables	Estimated Task Time	Completion Date	Responsible Manager	Status/Comments
<p><b>Recommendation 1:</b> Create guidelines for consulting others and identifying potential collaborations whenever departments initiate new programs or policies. Such guidelines would be a tool to remind managers to check with other departments for areas of synergy, collaborative opportunities, and to identify potential ways to work with non-profit and business sectors. Requests for funding of new programs would be accompanied by a completed checklist to ensure such opportunities have been explored.</p>	Organization-Wide Communication	Admin Memo - Guidelines and checklist	Medium Term 90-270 Days	12/31/2006	Assistant County Manager	9/06 - Will be assigned to newly hired Assistant County Manager; Recruitment process will take place July-Aug 2006
<p><b>Recommendation 2:</b> Publicize, both externally and internally, the innovations for which the County is recognized by outside groups. This would serve several purposes, including reinforcing the value and expectation of innovation, fostering public confidence in the value they are receiving through County services, and highlighting the County as a work environment that encourages excellence, which helps recruit the best workforce.</p>	Organization-Wide Communication	Internal and external publication of County innovations/recognition by outside groups	Medium Term 90-270 Days	12/31/2006	Mary McMillan	5/26/06 - Enhanced County Profile included in Recommended Budget available on County website with e-mail announcement sent to County employees; other publications to be identified through internal/external communications task forces (Recommendations 4 and 7)
<p><b>Recommendation 3:</b> Provide training for managers in methods of engaging employees in evaluating change, continuous improvement processes, and creating implementation plans for new programs or changes. Engaging employees in problem solving and planning for change will strengthen internal effectiveness and relationships.</p>	Organization-Wide Training	Training Plan for Managers/Supervisors	Medium Term 90-270 Days	12/31/2006	Director of Human Resources	8/06 - Will be assigned to new HR Director; Recruitment and selection of HR Director will be completed August 2006
<p><b>Recommendation 4:</b> Create a 90-day task force comprised of managers and line employees from a cross section of County departments to recommend improvements to external communication. The task force would make specific recommendations to the County Manager on the proposed methods and costs. The Deputy County Manager for Intergovernmental and Public Affairs would coordinate and provide advice to this task force.</p>	Organization-Wide Communication	Countywide (external) communication plan with recommendations and cost estimates to improve external communication	Short Term 90-120 Days	09/30/06	Mary McMillan	6/14/06 - plan submitted with proposed task force membership, purpose and desired outcomes
<p><b>Recommendation 5:</b> Establish specific expectations for department heads regarding communications. The County Manager's Office should be explicit regarding its expectations for department heads to disseminate certain information throughout the organization. A specific nomenclature to identify "countywide" messages should be put into place so that department heads know which messages must "trickle all the way down."</p>	Organization-Wide Communication	Admin Memo - Specific expectations for dissemination of information throughout organization	Medium Term 90-270 Days	12/31/2006	Mary McMillan	

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<p><b>Recommendation 6:</b> Establish a procedure that assures that information about policy change is distributed to all affected employees detailing the background and reasons for the policy change. Since line employees are in the field and have daily contact with customers, it is essential that they understand the context of County policies and be able to communicate them to customers. A variety of methods can be used for disseminating information, including email, memoranda, intranet and subject-specific meetings.</p>	Organization-Wide Communication	Admin Memo - Procedures to assure dissemination of policy changes to affected employees	Medium Term 90-270 Days	12/31/2006	Mary McMillan	
<p><b>Recommendation 7:</b> Create a 90-day task force comprised of managers and line employees from a cross section of County departments to recommend improvements to internal communications. Employees will be eager to help shape improved communications channels and to work with senior managers on the process. It fosters collaboration on a topic identified as important to staff. The task force would make specific recommendations to the County Manager on the proposed methods and costs. The County Manager's Office would convene and coordinate this task force.</p>	Organization-Wide Communication	Countywide (internal) communication plan with recommendations and cost estimates to improve internal communication	Short Term 90-120 Days	10/31/2006	Mary McMillan	6/14/06 - plan submitted with proposed task force membership, purpose and desired outcomes
<p><b>Recommendation 8:</b> Appoint a subcommittee of three members of the Executive Council to review the draft program and implementation plan developed in 1999-2000 to identify the elements that remain relevant and to produce a revised program for adoption in 2006. This streamlined subcommittee would identify ways in which to involve other managers and departments in their review and planning efforts. Part of their review efforts would be learning more about successes of other organizations and identify best practices that would strengthen San Mateo County's program.</p>	Organization-Wide Succession Planning	Succession Planning Program - Update of 1999-2000 Succession Planning Program Proposal for adoption in 2006	Short Term 90-120 Days	9/30/2006	John Maltbie/Mary Welch	5/10/06 - memo to Dept Heads to appoint representative to Succession Planning Task Force; 6/19/06 - first meeting of task force held
<p><b>Recommendation 9:</b> Assign responsibility for countywide succession planning leadership to the Assistant County Manager and responsibility for departmental leadership to each department head. The importance of this issue to the future of the County demands that succession planning be considered a key assignment for it to be successful. It is a long-term effort, and requires a long-term assignment and focus. While day-to-day activities relating to succession planning will be Human Resources responsibilities, oversight by someone at the level of Assistant County Manager is important.</p>	Organization-Wide Succession Planning	Succession Planning Program - Assignment of countywide responsibility	Short Term 90-120 Days	5/1/2006	John Maltbie	Complete - John Maltbie will oversee until new Assistant County Manager is hired; HR Director to have significant role in process

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<ul style="list-style-type: none"> <li><b>Recommendation 10:</b> Allocate sufficient funds for a comprehensive countywide succession planning program that augments departmental succession planning activities. The budget for FY2006-07 should contain sufficient funds in the Human Resources budget for enhanced training, development and succession planning programs. The specific amounts needed should be identified by Human Resources staff for next fiscal year (for at least one full-time position, initially), with funds for the ongoing program identified in the first quarter of FY2006-07.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Allocation of funds in FY 2006-07 Budget	Short Term 90-120 Days	9/30/2006	Reyna Farrales	5/26/06 - Upgrade of Training Manager, addition of one Management Analyst and \$100,000 for training included in FY2006-07/2007-08 Recommended Budget; 6/14/06 - approved request for one-time funding \$120,000 for Learning Management System; 9/06 - for Final Budget, will review need for additional funds when Task Force has completed recommendations in Sept 2006
<ul style="list-style-type: none"> <li><b>Recommendation 11:</b> Collect detailed information on all succession planning efforts under way in County departments, including an assessment of the effectiveness of each, and share the information with all executive managers. This information can be useful in the short term as departments create and/or enhance their internal succession planning programs. It also can be helpful in identifying best practices internally, as well as resources needed to foster effective staff development and promotions.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program -Report containing current succession planning efforts in County departments and effectiveness of each	Short Term 90-120 Days	9/30/2006	John Maltbie/Mary Welch	In progress
<ul style="list-style-type: none"> <li><b>Recommendation 12:</b> Identify the top management positions in which incumbents are likely to retire within the next one to five years (2006-2010) and develop individual plans to address succession into those positions. The County Manager's Office should have conversations with each person in the "top management" positions to find out his/her plan for retirement and enlist his/her assistance in creating a succession plan for the job. The plan should include elements such as job expectations, alternatives for organizing the work once the incumbent retires, identification of people within the organization who might be candidates for the position, career development and mentoring plans for those individuals, and an overall strategy for transitioning from the incumbent to his/her successor.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program -Report identifying incumbents in top management positions who are planning to retire in 1-5 years, and succession plan for each	Medium Term 90-270 Days	12/31/2006	Assistant County Manager	Each Department Head to be responsible for assembling information
<ul style="list-style-type: none"> <li><b>Recommendation 13:</b> Identify mid-management positions in which incumbents are likely to retire within the next one to five years (2006-2010) and develop individual plans for succession into those positions. This is similar to Recommendation 12 above for "top management". Every department director should be provided with a list of likely upcoming retirements in his/her department and take the lead in ensuring that individual plans are developed for succession into those positions.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program -Report identifying incumbents in mid-management positions who are planning to retire in 1-5 years, and succession plan for each	Medium Term 90-270 Days	12/31/2006	Assistant County Manager	Each Department Head to be responsible for assembling information

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<ul style="list-style-type: none"> <li><b>Recommendation 14:</b> Identify management and supervisory positions in which incumbents are likely to retire in the years 2011-2016 and develop plans to recruit, develop, and/or retain needed leadership. Attention should be placed on this group in the second and third year of the new succession planning program (FY2007-08 and FY2008-09).</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program -Report identifying incumbents in management and supervisory positions who are planning to retire in 1-5 years, and succession plan for each	Medium Term 90-270 Days	6/30/2007	Assistant County Manager	Each Department Head to be responsible for assembling information
<ul style="list-style-type: none"> <li><b>Recommendation 15:</b> Identify supervisors and management analysts interested in career development, and create individual development plans for each of them. Responsibility for career development is shared by the employee and the organization.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program -Report identifying supervisors and management analysts interested in career development, and individual development plans for each	Medium Term 90-270 Days	6/30/2007	Assistant County Manager	Each Department Head to be responsible for assembling information
<ul style="list-style-type: none"> <li><b>Recommendation 16:</b> Create a menu of options that could be used by executive managers in ensuring smooth transition of individuals into the "mid-level management" positions. Examples of options include (a) appointment of the successor several months to a year prior to the departure of the incumbent for training purposes, and during that time the incumbent would shift out of the direct role into mentoring and knowledge transfer; and, (b) providing candidates for the position with special projects and assignments that would enable them and the County to evaluate their potential and interest in the position.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Menu of options for executive managers to use in ensuring smooth transition of individuals into mid-level management positions	Longer Term 1-2 years	12/31/2007	Assistant County Manager	HR Director to have significant role
<ul style="list-style-type: none"> <li><b>Recommendation 17:</b> Require all managers and supervisors to include "talent development" as part of their primary job responsibilities, and evaluate them on the basis of their performance on that indicator, among other key performance indicators. All supervisors and managers should have development of staff and preparation for promotion within the County as main responsibilities.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Inclusion of talent development in primary job responsibilities and evaluations of management and supervisors	Medium Term 90-270 Days	12/31/2006	Director of Human Resources	Each Department Head to be responsible for assembling information
<ul style="list-style-type: none"> <li><b>Recommendation 18:</b> Establish a process to provide recognition to managers who actively mentor and develop staff. Mentoring and staff development should become an organizational value in the same way that collaboration is a value. Recognition could come in the form of favorable budget considerations for resources that enable staff to take on special assignments and participate in training; and publicizing success stories in internal newsletters, on the intranet, and by the County Manager and Board of Supervisors.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Recognition program for managers who mentor and develop staff	Longer Term 1-2 years	12/31/2007	Assistant County Manager	HR Director to have significant role

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<ul style="list-style-type: none"> <li><b>Recommendation 19:</b> Create and implement training for employees in the core competencies for success identified most often across the County. The Executive Council subcommittee should work with County departments to identify the core competencies needed by supervisors and managers. Human Resources staff should then be tasked with the creation and implementation of a related training program to help develop those skills. County staff should be encouraged, and given the time and opportunity to participate in outside training and coaching sessions (such as those sponsored by CAL-ICMA and others) with topics relevant to the County's core competencies.</li> </ul>	Organization-Wide Training	Training Plan for Managers/Supervisors	Longer Term 1-2 years	6/30/2007	Director of Human Resources	
<ul style="list-style-type: none"> <li><b>Recommendation 20:</b> Identify and implement methods of attracting young people who reflect the diversity of San Mateo County to local government as a key, long-term strategy. The County should work to recruit energetic young people to government service to create a continuous pipeline of new talent, as well as to address the diversity of the County's clients. The County should learn what is important to younger individuals and ethnic minorities, and identify ways in which the County needs to change to be attractive to them. Strategies could include expanded internship opportunities, hiring college students for short-term projects, appointing young people to County staff committees for college credit, and using County employees as ambassadors with culturally diverse groups and colleges.</li> </ul>	Organization-Wide Hiring and Promotional Practices	Succession Planning Program - Recruitment program to target young people who reflect the diversity of the County	Longer Term 1-2 years	6/30/2007	Director of Human Resources	
<ul style="list-style-type: none"> <li><b>Recommendation 21:</b> Identify ways in which jobs can be structured to accommodate newly retired individuals interested in part-time or flexible schedules, while providing the County with their talent and experience. As "baby boomers" retire but wish to remain active and engaged in their professions, the County should find ways to make use of this resource. While the emphasis should be on San Mateo County retirees, it need not be solely restricted to this group if others meet County needs.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Part-time and flexible schedules for retirees wishing to remain active and engaged in their professions	Longer Term 1-2 years	6/30/2007	Director of Human Resources	Each Department Head to participate in process
<ul style="list-style-type: none"> <li><b>Recommendation 22:</b> Conduct an analysis of the County's promotional hiring practices to identify what percent of employees are hired from within the department that has an opening, what percent are hired from other County employee ranks, and what percent are hired from outside the County workforce. This measure can be used by the Executive Council subcommittee as a baseline to see how well the County is able to move current employees into promotional positions. It also can be a point of comparison (and pride) for departments most successful in doing so.</li> </ul>	Organization-Wide Hiring and Promotional Practices	Succession Planning Program -Report with analysis of promotional hiring practices by County department	Medium Term 90-270 Days	6/30/2007	Director of Human Resources	

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<ul style="list-style-type: none"> <li><b>Recommendation 23:</b> Initiate a structured process for key personnel to capture and preserve institutional knowledge for their successor's insight and guidance. Each retiring manager should be asked to develop a "cookbook" or reference document for the department. Such documents should be prepared the maximum amount of time prior to the departure of the employee as possible so they can be used as a training tool.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - "Cookbook" or reference document for each retiring manager that captures and preserves institutional knowledge for the training of successors	Longer Term 1-2 years	6/30/2007	Assistant County Manager	Each Department Head to participate in process
<ul style="list-style-type: none"> <li><b>Recommendation 24:</b> Establish a procedure to overlap positions to the extent possible so that the retiring manager continues his or her employment for at least a week or two, alongside the replacement manager, for training and mentoring purposes. Recruitments to replace outgoing employees should proceed on a schedule that enables the new employee to benefit from the outgoing employee's knowledge.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Procedure to allow overlap (double-fill) of positions where a replacement has been hired for a retiring employee	Longer Term 1-2 years	6/30/2007	Director of Human Resources	Close coordination with Department Heads required to accomplish task
<ul style="list-style-type: none"> <li><b>Recommendation 25:</b> Create a rotational assignment program in the County Manager's Office as part of the Succession Planning Program that incorporates the value of conducting program and departmental reviews, policy analysis, and planning functions. Additional staff will be required to properly implement the reviews and analysis.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Rotational Analyst Program in County Manager's Office	Medium Term 90-270 Days	12/31/2006	Assistant County Manager	Added one Management Analyst in FY 2006-07/2007-08 Recommended Budget
<ul style="list-style-type: none"> <li><b>Recommendation 26:</b> Assign the Assistant County Manager the task of managing the project element of the Succession Planning Program and attendant staff, selecting individuals from other County departments to participate in assignments, and provide mentoring for participants.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Assignment of countywide responsibility	Short Term 90-120 Days	5/1/2006	John Maltbie	John Maltbie will oversee until new Assistant County Manager is hired
<ul style="list-style-type: none"> <li><b>Recommendation 27:</b> Establish a process that creates opportunities to move managers between departments for long-term assignments as a method for developing their County-wide management perspectives. County executive managers are most effective when they understand the entire County organization range of disciplines, and can apply their knowledge to the specific area of their assignment. Creating opportunities for mid-managers to move between departments will assist them in becoming well-rounded executives for the County.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Mid-Manager Program to move managers between departments to develop Countywide management perspectives	Longer Term 1-2 years	12/31/2007	Assistant County Manager	Close coordination with Department Heads required to accomplish task

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<ul style="list-style-type: none"> <li><b>Recommendation 28:</b> Provide developmental assignments such as staff rotations within departments and interdepartmental staff exchanges. This would provide opportunities for staff to learn new skills, see issues from other vantage points, and learn more about work they may wish to pursue. Additionally, rotations and exchanges provide new perspective on how the work is approached, which can result in improvements on process and outcomes. Further, offering rotations and exchange opportunities demonstrates to staff that their career development is worth an investment by the organization.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Staff Rotation/Exchange Program for County employees to explore career development opportunities	Longer Term 1-2 years	12/31/2007	Assistant County Manager	Department Heads to complete task in individual departments
<ul style="list-style-type: none"> <li><b>Recommendation 29:</b> Establish processes and a schedule of measuring results and evaluating the Succession Planning Program, and use the information to make improvements in the program. In addition to fostering continuous improvement of the program, measurement suggests to department heads how important planning for the future is for the County's policy makers. If it is being measured, there is a much greater likelihood it will be deemed important to the department head</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program -Regular performance reporting for the Succession Planning Program to make continuous improvements	Longer Term 1-2 years	6/30/2007	Assistant County Manager	HR Director to play significant role
<ul style="list-style-type: none"> <li><b>Recommendation 30:</b> Expand the County's Management Development and Mentoring Program to accommodate 20% of the County's management and supervisory employees each year. Given the expected pace of retirements, it is a critical time to invest in this program as one way of preparing individuals for promotion. The Human Resources staff will need more resources to expand the program from 28 to 163 participants per year.</li> </ul>	Organization-Wide Succession Planning	Succession Planning Program - Expansion of Management Development and Mentoring Program	Longer Term 1-2 years	12/31/2007	Assistant County Manager	HR Director to play significant role; Department Heads to identify participants
<ul style="list-style-type: none"> <li><b>Recommendation 31:</b> Establish an annual training target for every County employee to receive 20 hours of training per fiscal year, and task Human Resources with tracking the hours. In setting this training objective, County leadership should make it clear that employee development is a priority. While accommodating employee training time requires flexibility on the part of department management, this target will enhance the County's commitment to current employees and further succession planning.</li> </ul>	Organization-Wide Training	County Employee Training Plan - provide 20 hours of training each fiscal year for every County employee	Longer Term 1-2 years	12/31/2007	Assistant County Manager	HR Director to play significant role

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<ul style="list-style-type: none"> <li>• <b>Recommendation 32:</b> Require all first-time supervisors (whether external hires or internal promotions) to attend a "New Supervisors Training" class. This should occur within three months of their appointment. The class should review County expectations and policies on supervision and management of employees, development of staff, and organizational culture and values. Human Resources should be charged with tracking compliance with this requirement.</li> </ul>	Organization-Wide Training	Training Plan for Managers/Supervisors	Medium Term 90-270 Days	6/30/2007	Department Heads	HR to set up program and monitor compliance
<ul style="list-style-type: none"> <li>• <b>Recommendation 33:</b> Require all supervisors to attend a minimum of eight hours of supervisory training each year. Supervision and management, like technical skills, require ongoing training and review to keep fresh. These eight hours would be included within the 20-hour target suggested in Recommendation 31 above.</li> </ul>	Organization-Wide Training	Training Plan for Managers/Supervisors	Medium Term 90-270 Days	6/30/2007	Department Heads	HR to run program and monitor compliance
<ul style="list-style-type: none"> <li>• <b>Recommendation 34:</b> Provide guidance and coaching to department managers so they can give specific feedback to unsuccessful candidates. That way, these employees will be better informed about how to prepare themselves for future promotional opportunities. Feedback is important to learning and career development. Candidates should be given the opportunity to hear their perceived strengths, weaknesses and development opportunities so they may improve their skills and chances for promotion.</li> </ul>	Organization-Wide Hiring and Promotional Practices	Resources to provide guidance and coaching for managers to provide specific feedback to unsuccessful candidates	Medium Term 90-270 Days	6/30/2007	Director of Human Resources	
<ul style="list-style-type: none"> <li>• <b>Recommendation 35:</b> Enhance the information provided by Human Resources to employees about County procedures for hiring, recruitment, promotion, and transfer. Further educating County employees on how the system works will help reduce fears of preferential and unfair treatment. Include information on resources available to employees for furthering their career development. The information should be provided regularly as part of the County's internal communication outreach to employees, as noted in Recommendation 7.</li> </ul>	Organization-Wide Hiring and Promotional Practices	Enhanced communication to County employees about hiring, recruitment, promotion and transfer practices.	Medium Term 90-270 Days	6/30/2007	Director of Human Resources	
<ul style="list-style-type: none"> <li>• <b>Recommendation 36:</b> Create a formalized system to be used County-wide for the hiring of Extra Help positions. Departments should conform to some standard requirements as to how Extra Help positions are filled – but these requirements should not result in a delayed hiring process when departments need workloads covered immediately. Having a simple yet standardized system will reduce the appearance of bias or favoritism, as well as ensure a basic level of quality for Extra Help employees across the County.</li> </ul>	Organization-Wide Hiring and Promotional Practices	Formalized system for hiring Extra Help employees	Longer Term 1-2 years	6/30/2007	Director of Human Resources	



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<ul style="list-style-type: none"> <li><b>Recommendation 37:</b> Fund and increase the County's recruitment outreach and advertising efforts to diverse populations on the Peninsula. Added resources may be helpful in drawing more applicants representing the diversity of cultures and languages reflected within the county.</li> </ul>	Organization-Wide Hiring and Promotional Practices	Proposal to fund and increase recruitment outreach and advertising efforts to diverse populations on Peninsula	Longer Term 1-2 years	6/30/2007	John Maltbie	Assistant County Manager, Deputy County Manager (Admin Svcs), HR Director play role
<ul style="list-style-type: none"> <li><b>Recommendation 38:</b> Modify the County's performance evaluation system to ensure every County employee gets some form of structured feedback on his/her job performance at least once per year. As with other requirements, Human Resources staff should document that this feedback discussion has occurred and the employee should sign a statement that it has occurred.</li> </ul>	Organization-Wide Performance Feedback	Performance Evaluation Improvement Plan - modify County performance evaluation system to ensure every employee receives structured feedback annually	Medium Term 90-270 Days	6/30/2007	Assistant County Manager	HR Director to play significant role
<ul style="list-style-type: none"> <li><b>Recommendation 39:</b> Modify the County's performance evaluation processes to factor in employee input as a component of supervisory reviews. This gives managers and supervisors specific feedback on how to further improve their performance, which in turn, increases skills and capabilities for promotion. Additionally, the collaborative nature of the County requires that supervisors and managers work well with their peers and be reliable collaborators. Peer feedback can provide useful information for professional development objectives.</li> </ul>	Organization-Wide Performance Feedback	Performance Evaluation Improvement Plan - modify County performance evaluation system to include employee input as part of supervisory reviews	Longer Term 1-2 years	6/30/2007	Director of Human Resources	
<ul style="list-style-type: none"> <li><b>Recommendation 40:</b> Create a process through which the County Manager and executive team assess the performance and capabilities of the top 1-2% of the management group, at least through division head positions, as part of the succession planning and development program. Through this process, the County Manager and executive team can identify opportunities for individuals to continue their professional development and progression into leadership positions in the County.</li> </ul>	Organization-Wide Performance Feedback	Performance Evaluation Improvement Plan - modify County performance evaluation system to include assessment by executive team of top 1-2% of management group	Longer Term 1-2 years	6/30/2007	Assistant County Manager	
<ul style="list-style-type: none"> <li><b>Recommendation 41:</b> Assign responsibility to ISD for developing performance measures to accurately measure the cost and benefit of IT spending. These performance measures should be focused on cross-departmental and countywide IT projects, and should be reported annually.</li> </ul>	Organization-Wide Information Technology	Countywide IT Performance Measures and Annual Reports	Longer Term 1-2 years	6/30/2007	Chris Flatmoe	
<ul style="list-style-type: none"> <li><b>Recommendation 42:</b> Develop a new administrative policy on information technology that requires that ISD be involved at the beginning of a department's process of evaluating its technology needs or improvements. In support of this new policy, the ISD Director should provide a complete and comprehensive report to the County Manager of Countywide IT spending plans for the next fiscal year during the budget cycle. Meaningful guidance should be provided to departments so that Countywide interests are considered early in the decision making process.</li> </ul>	Organization-Wide Information Technology	Administrative Memorandum	Medium Term 90-270 Days	6/30/2007	Assistant County Manager	IT Director to play significant role

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<ul style="list-style-type: none"> <li><b>Recommendation 43:</b> Establish an Information Technology Planning Council (ITPC) comprised of department heads and executives appointed by the County Manager. The ITPC's mission would be developing the County's information technology policies, strategic plan, and recommendations for funding. Its recommendation would accompany any separate recommendations County departments make to the Board of Supervisors for funding. The Chair of the ITPC would rotate among the members, with the ISD Director serving as an ex-officio member providing staff support to the Council. The Assistant County Manager or Deputy County Manager for Administrative Services would also serve on the ITPC.</li> </ul>	Organization-Wide Information Technology	Plan for creation of IT Planning Council; purpose; roles and responsibilities; membership	Medium Term 90-270 Days	6/30/2007	County Manager	Assistant County Manager to head the Council
<ul style="list-style-type: none"> <li><b>Recommendation 44:</b> Using evaluation criteria approved by the ITPC, bi-annually evaluate the results achieved by each of the existing IT committees and associated staff time, review their charters, and make modifications as indicated by the review. Periodic evaluation of results of committees is important as a way to ensure that the staff time spent is producing desired outcomes.</li> </ul>	Organization-Wide Information Technology	Evaluation of results - IT committees	Longer Term 1-2 years	6/30/2007	Assistant County Manager	
<ul style="list-style-type: none"> <li><b>Recommendation 45:</b> Revise the County's IT Strategic Plan to establish policies for making decisions about IT investments, performance indicators, and a five-year timeframe for budgeting. Set a target date for the formal adoption of the IT Strategic Plan for San Mateo County. The new strategic plan should establish an enterprise-wide perspective while meeting operational needs of County departments. Guidance for the strategic planning process would be provided by the ITPC, and would be developed collaboratively by ISD and all County departments.</li> </ul>	Organization-Wide Information Technology	Revised County IT Strategic Plan	Longer Term 1-2 years	6/30/2007	Assistant County Manager	IT Director to develop the Plan for consideration

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<p>• <b>Recommendation 46:</b> Initiate a departmental review process using an independent consultant, with assistance from assigned County staff, to make recommendations for program improvements. The assignment of County staff to work with an experienced consultant offers many benefits to the County and those assuming the assignments. In addition to providing useful information for the department under review and the County Manager and Board of Supervisors, the investment in program reviews can be part of the County's succession planning sequence by developing the skills of staff who aspire to County leadership positions. The consultant would have the ultimate responsibility for completion of reports, and presentations to County management and the Board of Supervisors. The Assistant County Manager should assume the day-to-day operational responsibility for this review function. The County Manager's Office staff needs to accommodate this process are discussed in the later section of this report regarding the organization of the Office.</p>	Organization-Wide Department Reviews	Work plan and schedule; regular status reports; findings and recommendations; final report; implementation plan	Short Term 90-120 Days	10/31/2006	Reyna Farrales	Reyna Farrales will oversee first review (Department of Housing) until new Assistant County Manager is hired; 6/7/06 - kick-off meeting with Management Partners and Review Team members; 6/06 - developed work plans, conducted orientation and focus groups; 7/6/06 team meeting-monthly status
<p>• <b>Recommendation 47:</b> Review department and agency names to determine whether changes would help customers find the service they seek, and make changes as appropriate. The Deputy County Manager for Intergovernmental and Public Affairs should assist in the review and naming process to provide a non-departmental and customer perspective. Based on our review of overall County organization, we believe that using the term "department" for the operating units would establish the necessary consistency and remove the confusion that currently exists. The subordinate working groups for each department would then become divisions.</p>	Organization-Wide Dept/Agency Names/Titles	Recommendations to modify department and agency names	Medium Term 90-270 Days	6/30/2007	Assistant County Manager/Mary McMillan	Should be accomplished for FY 2007-08/2008-09 Budget
<p>• <b>Recommendation 48:</b> Create standard e-mail groups to be used for the appropriate type of communication and monitor their usage to aid in consistency. ISD should create e-mail grouping templates for various organizational levels (i.e. the Agency/Department Director level, Deputy Director level and so on). These group names should be distributed countywide for use by all employees to ensure consistent inclusion of the correct employees in communications.</p>	Organization-Wide Information Technology	Standard E-Mail Groups	Longer Term 1-2 years	6/30/2007	Chris Flatmoe	
<p>• <b>Recommendation 49:</b> Create a detailed online County directory by service, program, and staff to make it easy for customers to find who or what they seek.</p>	Organization-Wide Information Technology	Online County Directory	Longer Term 1-2 years	6/30/2007	Mary McMillan	Department Heads to participate in developing groups

RECOMMENDATIONS	Issue Area	Deliverables	Estimated Task Time	Completion Date	Responsible Manager	Status/Comments
<ul style="list-style-type: none"> <li><b>Recommendation 50:</b> Increase the budget for each member of the Board of Supervisors by an amount equal to one additional full-time staff position, to be used at the discretion of the Supervisor. Added capacity would be beneficial to members of the Board of Supervisors, given the demands placed on them by constituents, committee assignments, and other responsibilities. An amount can be placed in the budget for each Supervisor, and then each can then determine if the need is for an additional staff person or contractual services to address specific single needs.</li> </ul>	Organizational Changes	Budget adjustment	Short Term 90-120 Days	5/31/2006	Reyna Farrales	5/26/06 - Added 5 Chief Legislative Aide positions to FY 2006-07/2007-08 Recommended Budget
<ul style="list-style-type: none"> <li><b>Recommendation 51:</b> Modify the role of the Assistant County Manager position to include leadership for multi-disciplinary collaboration and problem-solving, executive leadership for succession planning, and corporate level support and assistance on issues of importance to the County. This position could play a lead role in convening inter-departmental task forces and in setting key policies. Potential arenas of value-added assistance by the Assistant County Manager would be with County health, human services, substance abuse services, and information technology – given the complexities of the policy, collaborative and program issues involved in each of these program and functional assignments.</li> </ul>	Organizational Changes	Assignment of roles and responsibilities	Short Term 90-120 Days	6/30/2006	John Maltbie	Will assign roles and responsibilities to new Assistant County Manager
<ul style="list-style-type: none"> <li><b>Recommendation 52:</b> Transfer the Capital Projects unit to Public Works reporting to the Director to provide oversight for the construction of new facilities and capital improvement plan for the County. The Public Works Department currently has responsibility for construction and has strong alignment with capital projects responsibilities. Transferring the Capital Projects unit to Public Works under the Director would provide the level of oversight needed for future capital needs of the County.</li> </ul>	Organizational Changes	Transition Plan	Short Term 90-120 Days	10/1/2006	John Maltbie/Paul Scannell/Neil Cullen	New organizational structure will be included in September Revisions for Adopted Budget
<ul style="list-style-type: none"> <li><b>Recommendation 53:</b> Create an Economic Development Director position by broadening the responsibilities of the Real Property Manager to include Economic Development, and have the individual report to new Deputy County Manager for Community Services. The County would be well served by establishing an economic development focus, particularly for the Fair Oaks unincorporated area of the County. The Real Property Manager has the capacity and capability of creating an economic development program for the County. Assigning responsibility for economic development to the Real Property Manager would serve as a development opportunity for that individual.</li> </ul>	Organizational Changes	Transition Plan	Short Term 90-120 Days	10/1/2006	John Maltbie/Paul Scannell	Director of Economic Development adjustment included in Recommended Budget; New organizational structure will be included in September Revisions for Adopted Budget

RECOMMENDATIONS	Issue Area	Deliverables	Estimated Task Time	Completion Date	Responsible Manager	Status/Comments
<ul style="list-style-type: none"> <li><b>Recommendation 54:</b> Add one senior analyst level position to the County Manager's Office, assigned to the Assistant County Manager, to become part of the management development program within the Office, and to assist with the departmental review process. The analyst would primarily be assigned to the County Manager's Office, but could be assigned to any of the operating departments as a means of training in-house personnel for future management positions in the organization.</li> </ul>	Organizational Changes	Budget adjustment	Short Term 90-120 Days	5/31/2006	Reyna Farrales	5/26/06 - Added one Management Analyst in Recommended Budget
<ul style="list-style-type: none"> <li><b>Recommendation 55:</b> Create a new position of Assistant Clerk of the Board and delete an Agenda Administrator position. An Assistant Clerk of the Board would add capacity and provide oversight for the Clerk of the Board function. The Clerk of the Board function would remain part of the County Manager's Office.</li> </ul>	Organizational Changes	Salary Ordinance Amendment and Budget adjustment	Short Term 90-120 Days	5/31/2006	Reyna Farrales	6/6/06 - Add/Delete included in June Salary Ordinance Amendment and Recommended Budget
<ul style="list-style-type: none"> <li><b>Recommendation 56:</b> Review the August 2005 recommendations by Bartig, Basler &amp; Ray to ascertain which can be implemented immediately, which can be implemented later and which should not be implemented. The review and decisions should be made collaboratively between the County Manager's Office, the County Counsel's Office and the Assessor's Office. The new Assistant Clerk of the Board should manage this review and report progress to the Office Services Manager on a regular basis.</li> </ul>	Organizational Changes	Monthly report with status of implementation for each recommendation in BB&R review; quarterly status report to Assessment Appeals Board members	Short Term 90-120 Days	4/30/2006	Nancy Guerrero and Assistant Clerk of the Board	4/06 - Completed status report April 2006; Most recommendations have been completed with exception of improvements to EZ Access system; working with Assessor's Office to implement remainder of recommendations
<ul style="list-style-type: none"> <li><b>Recommendation 57:</b> Restructure the responsibilities of the Deputy County Manager for Budget and Performance to include additional management responsibilities and change the title to Deputy County Manager for Administrative Services. Increase the scope of responsibilities of the Deputy County Manager to provide management and coordination of the following functions: (1) Budget and Performance (which would be expanded to include CDF contract administration), (2) Human Resources (which would include Benefits, Employee Relations, and Risk Management), and (3) Internal Services (which would include Purchasing, Copy Center, and Mail Room. At the same time, formalize the assignment of the legal contract for risk management liability to the County Counsel. Such a restructuring means that a new Director of Human Resources must be recruited to handle the full range of responsibilities of this important function. Enhancing the responsibilities of the Deputy County Manager to include a broader range of administrative functions will provide developmental</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	5/26/06 - Deputy County Manager for Administrative Services adjustment included in Recommended Budget; New organizational structure will be included in September Revisions for final budget

RECOMMENDATIONS	Issue Area	Deliverables	Estimated Task Time	Completion Date	Responsible Manager	Status/Comments
<p>• <b>Recommendation 58:</b> Add a position of Deputy County Manager for Community Services to have management responsibility for the following County functions: Planning and Building, Public Works (to include Capital Projects), Housing, Parks and Recreation, Public Safety Communications, Economic Development (to include Real Property), and Resource Management. Assign assistance to the Local Area Formation Commission and the San Mateo County Library Joint Powers Authority to the Deputy County Manager for Community Services. With this change, Public Safety Communications would become a unit within the County Manager's Office. A new Office of Economic Development would be created, to include responsibility for Real Property. New County departments would be established for Planning and Building, and Parks and Recreation. The County departments of Public Works (to include the Capital Projects unit) and Housing would remain separate departments, but would be coordinated and receive management oversight by the Deputy County Manager. The Resource Management function is included in</p>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	5/26/06 - New Deputy County Manager of Community Services position added in Recommended Budget; New organizational structure will be included in September Revisions for final budget
<p>• <b>Recommendation 59:</b> Assign the added responsibility for internal communications, strategic planning and special projects to the Deputy County Manager for Intergovernmental and Public Affairs. Add one analyst position and one graphics specialist/administrative support position to assist with the increased scope of work.</p>	Organizational Changes	Assignment changes and budget adjustments	Short Term 90-120 Days	6/30/2006	John Maltbie	5/26/06 - Deputy County Manager for Intergovernmental and Public Affairs adjustment, addition of one Management Analyst and one Graphics Specialist included in Recommended Budget
<p>• <b>Recommendation 60:</b> Eliminate the Employee and Public Services Department of the County and transfer its functions as follows: (1) To the Tax Collector/Treasurer: Revenue Services (all but Animal Licensing, which would go to the Health Department along with Animal Control), (2) To the Deputy County Manager for Administrative Services: Human Resources Department; Mail Center/Copy Center/Purchasing, (3) To the Deputy County Manager for Community Services: Public Safety Communications. These changes will build on the theme of collaboration and coordination across the County organization, and will provide greater visibility for functions with both external and internal customers of the services. All the receiving entities have the capacity to handle the organizational responsibilities resulting from the changes.</p>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie/Mary Welch	6/20/06 - transfer of Revenue Services to Tax Collector-Treasurer included in June budget revisions; 10/06 - all other organizational structure changes will be included in September Revisions for final budget

RECOMMENDATIONS	Issue Area	Deliverables	Estimated Task Time	Completion Date	Responsible Manager	Status/Comments
<ul style="list-style-type: none"> <li><b>Recommendation 61:</b> Create a Human Resources Department with the Director reporting to the Deputy County Manager for Administrative Services. The full range of Human Resources activities relating to employee recruitment and selection, classification and compensation, training, benefits, risk management, equal employment opportunity, and employee relations should remain as a cohesive work unit to ensure the coordination necessary for effective service delivery.</li> </ul>	Organizational Changes	Budget adjustment and transition plan	Medium Term 90-270 Days	10/1/2006	John Maltbie	5/26/06 - Position adjustments included in Recommended Budget; New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 62:</b> Assign the Risk Management function as part of the Human Resources function within the Administrative Services section of the County Manager's Office. There are natural ties between the personnel and administrative activities previously recommended for placement in the County Manager's Office. In addition, there are ties of the financial aspects of Risk Management to the budgeting responsibilities of this Deputy County Manager. Continuing a close relationship and coordination with the County Counsel's Office handling the legal aspects of risk and liability management is assumed with this transition of the function to the Deputy County Manager.</li> </ul>	Organizational Changes	Transition Plan	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 63:</b> Assign responsibility for legal services contracts for Risk Management functions to the County Counsel. The legal aspects of liability for Risk Management activities should rest with the County Counsel. Continued close collaboration with the Human Resources and Risk Management staff should continue.</li> </ul>	Organizational Changes	Transition Plan	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 64:</b> Assign Purchasing/Copy Center/Mail Room as part of the new Administrative Services division of the County Manager's Office. The determination of supervisory responsibilities should be made as part of the transition planning for these activities.</li> </ul>	Organizational Changes	Transition Plan	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 65:</b> Assign the Public Safety Communications unit to the new Community Services group within the County Manager's Office. The Public Safety Communications Manager would report to the Deputy County Manager for Community Services. This assignment will solidify the working relationship between the chief executive level of the County and the various participants in the service.</li> </ul>	Organizational Changes	Transition Plan	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 66:</b> Create a facilities plan for a future new location of Public Safety Communications. This plan should build in some level of growth for the addition of consoles in case of further consolidation in the future.</li> </ul>	Organizational Changes		Longer Term 1-2 years	6/30/2007	Neil Cullen	

RECOMMENDATIONS	Issue Area	Deliverables	Estimated Task Time	Completion Date	Responsible Manager	Status/Comments
<ul style="list-style-type: none"> <li><b>Recommendation 67:</b> Assign Revenue Services to the Tax Collector/Treasurer and create a plan to transition management and responsibility for Revenue Services to the Tax Collector/Treasurer. Transfer Animal Licensing from Revenue Services to the Health Department (accompanying Animal Control). The Division should be reorganized under the Tax Collector/Treasurer's administration, with care given to a smooth transition. Given current space constraints, a physical co-location may not be possible in the short-term. Work hours between Revenue Services and the Tax Collector/Treasurer vary, and work methods vary. The transition will require a phasing plan. As part of the transition plan, move Animal Licensing with Animal Control to the Health Department, since Animal Licensing is a function related to Animal Control, which is being moved to the Health Department as part of its mission pertaining to public health and protection.</li> </ul>	Organizational Changes	Transition Plan	Medium Term 90-270 Days	10/1/2006	John Maltbie	6/20/06 - transfer of Revenue Services to Tax Collector-Treasurer included in June budget revisions; 10/06 - transfer of Animal Licensing and Animal Control to Health Department will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 68:</b> Eliminate the Environmental Services Agency of the County and transfer the functions to other County operations as follow: (1) To the Deputy County Manager for Community Services: Planning and Building, Local Area Formation Commission, San Mateo County Library Joint Powers Authority, Parks and Recreation; (2) To the Deputy County Manager for Administrative Services: California Department of Forestry contract administration; (3) To the Health Department: Animal Control; Agriculture, Weights and Measures; UC Cooperative Extension. The functions now within ESA would benefit by close coordination with other functions as described in this report. In addition, the visibility that will result for many of the services with oversight by the County Manager's Office will enhance coordination with other governmental agencies.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 69:</b> Create a Planning and Building Department to report to the Deputy County Manager for Community Services. This will provide for greater policy and strategic level support for this important County function.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 70:</b> Transfer the responsibility for coordinating LAFCO to the newly created Deputy County Manager for Community Services. This move will keep the County's functions together for addressing future land use and services for both county and city residents.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget



RECOMMENDATIONS	Issue Area	Deliverables	Estimated Task Time	Completion Date	Responsible Manager	Status/Comments
<ul style="list-style-type: none"> <li><b>Recommendation 71:</b> Transfer the responsibility for coordinating the Library JPA functions to the newly created Deputy County Manager for Community Services. The working relationship between the County and incorporated cities for library services can be very sensitive, requiring top executive oversight. This oversight should come from the County Manager's Office.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 72:</b> Create a Parks and Recreation Department to report to the new Deputy County Manager for Community Services. Coordination of current and future services for residents of the county, incorporated and unincorporated, is key to this recommendation. The County Manager's Office best meets the need for executive level coordination.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 73:</b> Assign Animal Control Services to the Health Department. A significant aspect of animal control operations is the protection of residents from the diseases resulting from wild or unsafe animals. Public Health must deal with these potential diseases and as such is the agency best suited to provide direction to the Animal Control unit. As part of this move, and as part of the transition of Revenue Services to the Tax Collector/Treasurer, move Animal Licensing to the Health Department.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 74:</b> Assign responsibility for the Agriculture and Weights and Measures division to the Health Department (Environmental Health). The majority of its functions is closely aligned with the public health and environmental health operations of Public Health and would benefit by integration with Health services.</li> </ul>	Organizational Changes	Transition Plans	Medium-to-Long Term 90-Days to 1-2 years	no later than 9/30/2007	John Maltbie	Will review inspection and regulatory responsibilities as well as need for agriculture promotion in community and develop phase-in recommendations as part of September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 75:</b> Assign responsibility for the University of California Cooperative Extension to the Health Department.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 76:</b> Transfer CDF contract administration to the Budget and Performance section, reporting to the Deputy County Manager for Administrative Services. This assignment will allow for better coordination of the financial aspects of the contract for fire services with the State while not impacting the basic day-to-day administration of the contract. It will also provide a management development opportunity for the Deputy County Manager.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget

RECOMMENDATIONS	Issue Area	Deliverables	Estimated Task Time	Completion Date	Responsible Manager	Status/Comments
<ul style="list-style-type: none"> <li><b>Recommendation 77:</b> Assign the Public Works Department to report to the Deputy County Manager for Community Services. This move will provide coordination and alignment of activities with similarly-focused County functions as well as improve coordination with special districts, cities, and other agencies in the County. The timing of this reporting relationship change should be determined by the County Manager.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 78:</b> Move the Tobacco Prevention Program to the Health Department. The focus of the tobacco unit is clearly aligned with the mission of the Health Department.</li> </ul>	Organizational Changes	Transition Plans	Medium Term 90-270 Days	10/1/2006	John Maltbie	New organizational structure will be included in September Revisions for final budget
<ul style="list-style-type: none"> <li><b>Recommendation 79:</b> Structure the (Alcohol and Drug) strategic planning process to include meaningful leadership and collaboration with the Health Department and with other County operations whose services and clients are affected by substance abuse. Include as an element of the planning process the question of where alcohol and drug abuse services should be located within the organization. The placement of the unit should follow the strategic and programmatic focus of the unit.</li> </ul>	Organizational Changes	Recommendation on where Alcohol and Drug should be placed in the County organization	Longer Term 1-2 years	6/30/2007	Assistant County Manager	Recommended organizational changes will be developed as part of strategic plan