



Service Opportunity Assessment Review

Update to the Council

Jill Miller & Megan Hillyard

Agenda

01. SOAR Goals

02. The Process

03. The Consultant

04. Next Steps



What is SOAR

The Service Opportunity Assessment Review (SOAR) is a collaborative initiative to review, and where appropriate, reimagine, county operations in the areas of physical, digital, human capital and operational transformation.

Goals include:

1. Maximizing service delivery
2. Reviewing the allocation of scarce resources
3. Recruiting and retaining the highest quality employees



Committees So Far...

RFP Development Committee

1. **Chris Stavros, Assessor**
2. **Christie Morgan**
3. **Corinne Johnston**
4. **Isaac Higham**
5. **Lannie Chapman, Clerk**
6. **Lisa Hartman**
7. **Ralph Chamness**
8. **Rashelle Hobbs, Recorder**
9. **Reid Demman, Surveyor**
10. **Robin Chalhoub**

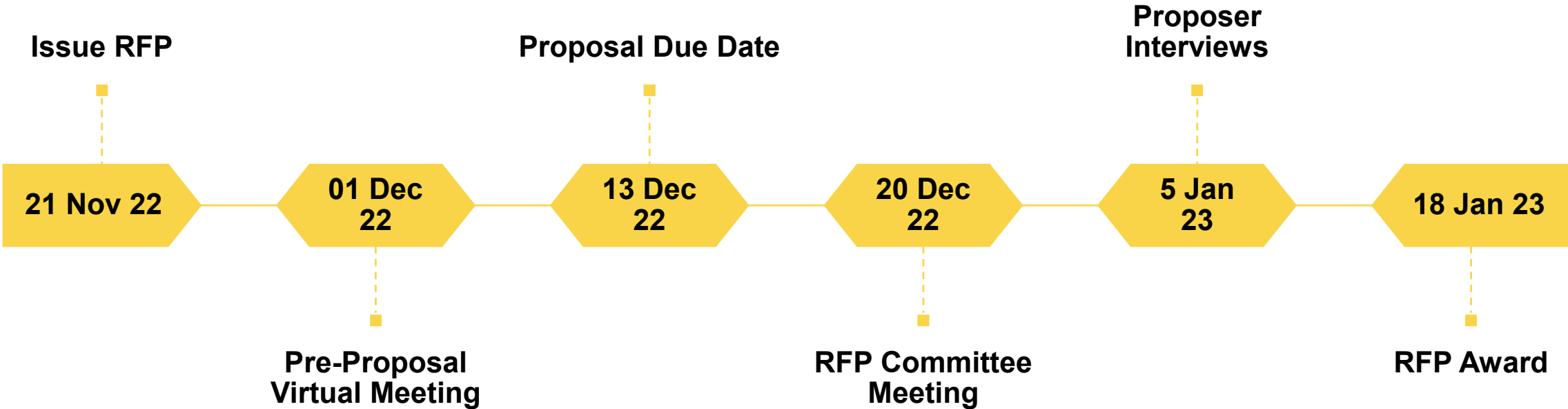
RFP Selection Committee

1. **Chris Stavros, Assessor**
2. **Corinne Johnston**
3. **Jill Miller**
4. **Lannie Chapman, Clerk**
5. **Lisa Hartman**
6. **Megan Hillyard**
7. **Reid Damman, Surveyor**
8. **Robin Chalhoub**
9. **Will Kocher**

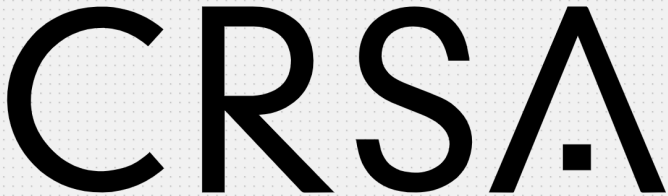


RFP Timeline

5 Responses
4 Finalists
1 Selected (Joint Proposal)



Our Partners



CRSA
Architecture.
Planning.
Interiors.



EMERGENT SOLUTIONS
ORGANIZATION DESIGN LABS

Our Partners



Kathy Wheadon, AIA, NCARB, LEED® AP | Principal In Charge | CRSA ↗

Education

- Master of Architecture, North Carolina State University, 2001
- Bachelor of Architectural Studies, University of Washington, 1989

Licenses & Certifications

- LEED® Accreditation, 2003
- Utah Licensed Architect #12287819-0301
- NCARB Certified

Years of Relevant Experience: 32 years

Years with Current Firm: 22 years

Current Title: Principal in Charge

Level of Responsibility: Vice President, Managing Principal

Relevant Experience

- Taylorsville Space Office Building
- Statewide Space Utilization Study & UDAF AWS Test Fit, UT
- Statewide Space Standards & AWS Application Toolkit, UT
- UTA SLCentral Office Workplace Strategy

Kathy leads a team of designers, architects, and urban planners making the communities and buildings we all want to live in. She works regionally on civic and academic projects, all with the same attention to design, and high performing sustainable buildings and landscapes.

- Department of Technology Service Offices
- Department of Administrative Services
- Utah Department of Government Operations
- Utah Division of Emergency Management

Our Partners



Reza Ahmadi, PHD | Workplace Strategist | ESODL ↗

Education

- PhD, Organizational Psychology, California School of Professional Psychology
- Bachelor of Arts, Psychology, UC Santa Barbara

Years of Relevant Experience: 20 years

Years with Current Firm: 8 years

Current Title: Managing Principal

Level of Responsibility: Owner

Reza has two decades of experience working with leaders to develop high performance organizations. His consulting experience spans organizational and leadership development, organizational assessment, process development, workplace strategy and change management.

Relevant Experience

- UTA Master Task Ordering Agreement Architectural Consultant Services
- Taylorsville State Office Building, Taylorsville, UT
- Utah Department of Technology Service Offices
- Utah Department of Administrative Services
- Utah Department of Government Operations
- Utah Department of Agriculture and Food
- Statewide Space Utilization Study & UDAF AWS Test Fit
- Statewide Space Standards & AWS Application Toolkit

Sample Project Tasks

Task 1 | Needs Inventory

- **Project Launch**
 - Information Request and Review
 - Existing Conditions Assessment
 - Life Cycle Cost Analysis
 - Workplace Survey
 - Space Utilization Study
- **Workplace Visioning Workshops**
- **Agency Scorecard & Self-Assessment**
- **Leadership Values Proposition Workshop**

Task 2 | Opportunity Development

- **Industry & Peer Benchmarking**
- **Physical Space Transformation Findings and Recommendations**
- **Opportunity Development Workshop**
- **Funding and Cost Analysis**

Task 3 | Solutions Development

- **Operations & Customer Services (Cx) Transformation**
- **Physical Space Transformation**
- **Digital Transformation (IT) Transformation**
- **Human Capital (HR) Transformation**
- **Engagement**
- **Deliverable**
 - Service Delivery Approach
 - Real Estate Master Plan
 - Finance Strategy Plan
 - Roadmap for Change

Project Steering Committee



Thank you

