

Scope of Work: Administrator Transition Support

Prepared for: LMRWD Board of Managers

Position: Transition and Advisory Services Performed by Naiad Consulting

Duration: 3 months with potential for extension

Timeframe: May 21st, 2025 – August 21st, 2025

Budget: Not to exceed \$50,000

I. Objectives

The primary objective of this transition engagement is to ensure a **comprehensive and seamless transfer of institutional knowledge**, contacts, procedures, and project status from the outgoing to the incoming District Administrator. This will support continued operational efficiency, regulatory compliance, and strategic momentum within LMRWD programs.

II. Tasks

Section 1: Orientation & Onboarding

Timeline: Present-May 31

Tasks: 1.1–1.2, 2.1–2.2

Deliverables: D1 – Onboarding Plan & Calendar, D2 – Record & Stakeholder Transfer

Description:

This section initiates the administrator transition with a structured onboarding process and foundational knowledge transfer. The outgoing administrator will guide the incoming administrator through the District's mission, key responsibilities, and current organizational structure. A calendar of meetings and key milestones will be created, along with orientation sessions tailored to the LMRWD's complex role in water resource governance. Deliverables include a formal onboarding schedule, transfer of all critical

digital and physical records, and a stakeholder directory with context notes. This ensures the incoming administrator is immediately equipped with institutional knowledge and relationship continuity.

Section 2: Current Projects & Operational Context

Timeline: Present-June 15

Tasks: 3.1–3.2, 4.1–4.2

Deliverables: D3 – Project & Contract Overview, D4 – Financial & Regulatory Calendar

Description:

The second phase provides the incoming administrator with a deep understanding of the District's ongoing projects, consultant relationships, and regulatory duties. The outgoing administrator will lead briefings on active initiatives such as bluff stabilization, creek restoration, and stormwater permitting, and walk through contract scopes and deliverables with legal and technical consultants. Parallel sessions will cover statutory obligations, permitting schedules, and the financial structure of the District's budget, including grants and partnerships. This section culminates in deliverables that map the LMRWD's project status and upcoming financial/regulatory requirements, giving the new administrator tools for proactive leadership.

Section 3: Internal Processes & Institutional Memory

Timeline: Present-June 30

Tasks: 5.1-5.2

Deliverables: D5 – Standard Operating Procedures Manual

Description:

In this section, the outgoing administrator documents the core internal operations of the LMRWD. Standard operating procedures for board meeting preparation, consultant coordination, permit management, digital recordkeeping, and interagency communication will be laid out. This ensures continuity in the day-to-day administration and provides the incoming administrator with a user-friendly guide to running the organization smoothly. The result is a guide, tailored to the LMRWD's processes, values, and timelines, enabling consistent, confident execution of key administrative duties.

Section 4: Strategic Handoff & Support

Timeline: Present-July 15

Tasks: 6.1–6.2, 7.1

Related Deliverables: D6 – Strategic Transition Memo, D7 – On-call Support Record

Description:

The final section moves from tactical operations to strategic foresight. The outgoing administrator will draft a forward-looking memo outlining key risks, opportunities, and recommended priorities for the next 1–5 years. Areas like operational efficiency (automation, fee schedules, and subcontracting) and stakeholder engagement strategies will be addressed. This period also includes a one-month period of availability for follow-up questions, ensuring the incoming administrator has confidence and support through their first Board meetings and major decision points. The combination of forward guidance and continued mentorship rounds out the transition with professionalism and resilience.

III. LMRWD Administrator Transition – Structured Tasks & Deliverables Timeline (May–August 2025)

Task ID	Task Description	Deliverable ID	Deliverable Description
Task 1	Kickoff & Onboarding Development	D1	Onboarding Plan & Calendar
1.1	Kickoff meeting with incoming administrator and Board Chair	D1.1	Draft onboarding schedule and initial goals
1.2	Refine onboarding based on roles, calendar alignment, and expectations	D1.2	Finalized orientation document and shared the schedule
Task 2	Transfer of Records and Stakeholder Info	D2	Digital/Physical Record Transfer, Account Access, & Stakeholder Directory
2.1	Organize and digitize critical files (permits, plans, contracts, board packets)	D2.1	Folder structure and archive in a shared drive
2.2	Prepare directory of key contacts with context and communication tips	D2.2	Key stakeholder directory (Board, consultants, LGUs, state partners)
Task 3	Briefings on Ongoing Programs and Agreements	D3	Project and Contract Overview Report
3.1	Brief on active projects and priority areas (e.g., bluff stabilization, Spring Creek, CWMP update)	D3.1	Written summary with status and timelines
3.2	Review existing consultant and vendor contracts; explain scopes and deliverables	D3.2	Annotated contracts register with key terms and renewal timelines
Task 4	Statutory & Financial Responsibilities Transfer	D4	Calendar of Obligations & Financial Overview

4.1	Review statutory requirements and recurring deliverables (e.g., audits, permits, annual report)	D4.1	Annual obligations calendar
4.2	Budget orientation: review funding sources, grants, and expenditure tracking	D4.2	Budget summary & grant status sheet
Task 5	Documenting Standard Operating Procedures (SOPs)	D5	SOP Manual
5.1	Outline monthly and yearly workflows for LMRWD administrative operations	D5.1	SOP outline draft
5.2	Detail procedures for seasonal procedures with BWSR, counties, permit processing, recordkeeping, audits, and consultant coordination	D5.2	Full SOP manual with attachments
Task 6	Transition Memo & Strategic Recommendations	D6	Final Transition Memo
6.1	Identify upcoming strategic opportunities and potential improvements	D6.1	Outline of short- and long-term priorities
6.2	Draft recommendations for operational efficiency (automation, staggered fees, subcontracting admin roles)	D6.2	Memo with transition reflections and process improvement recommendations
Task 7	On-call Support & Knowledge Reinforcement	D7	As-Needed Q&A and Support Availability

7.1	Maintain availability for 2–6 hour/week check-ins to answer questions or clarify items as needed	D7.1	Weekly availability log / email record (if required)
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IV. Format for Deliverables

Deliverable No.	Description	Format
D1	Onboarding plan and calendar with meeting agendas	PDF / Shared Doc
D2	Login info; Directory of key contacts with notes on roles and communication protocols	Excel / Google Sheet
D3	Project status report covering all current initiatives and outstanding tasks	Word / PDF
D4	Statutory & Financial Responsibilities Transfer	Resolution/login/introductions
D5	SOP manual or outline	Digital Templates
D6	Transition memo summarizing observations and recommendations for continuity and priorities	Memo (PDF)

D7	On-call deliverables will vary	TBD
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V. Budget for NAIAD 3 Month Workplan

A. Ongoing Administrative Tasks

Task	Estimated Hours (3 months)	Subtotal (\$)
Board & Committee Meetings	50	\$5,000
Financial Management & Reporting	25	\$2,500
Permitting & Regulatory Compliance	30	\$3,000
Project Coordination & Planning	20	\$2,000
Education & Outreach	10	\$1,000
General Administration	60	\$6,000
Travel & Site Visits	15	\$1,500
Stakeholder Engagement	20	\$2,000
Technology & Website Management	10	\$1,000
Policy & Legal Compliance	10	\$1,000
Subtotal	250 hours	\$25,000

B. One-Time Transition Deliverables

Deliverable	Estimated Hours	Subtotal (\$)
Onboarding plan and calendar with meeting agendas	10	\$1,000
Login info; Directory of key contacts	10	\$1,000
Project status report covering current initiatives	12	\$1,200
Statutory & Financial Responsibilities Transfer	12	\$1,200
SOP manual or outline	15	\$1,500
Transition memo summarizing recommendations	10	\$1,000
On-call deliverables (as needed)	10	\$1,000
Subtotal	79 hours	\$7,900

C. Program-Based Support

Program Area / Task	Estimated Hours	Subtotal (\$)
Vernon Avenue Dredge Project – Contract & Consultant Coordination	25	\$2,500
Vernon Avenue Dredge Project – Permit Tracking & Compliance	15	\$1,500
Vernon Avenue Dredge Project – Budget Management & Invoicing	15	\$1,500
Area 3 Bluff Stabilization – Meeting Coordination	15	\$1,500
Area 3 Bluff Stabilization – File & Record Management	10	\$1,000
Area 3 Bluff Stabilization – Project Financing	10	\$1,000

Area 3 Bluff Stabilization – Grant Management & Reporting	10	\$1,000
Spring Creek Project – Communication Support	10	\$1,000
Spring Creek Project – Consultant Oversight & Documentation	10	\$1,000
Subtotal	120 hours	\$12,000

D. Budget Summary Table

Category	Estimated Hours	Subtotal (\$)
Ongoing Administrative Tasks	230	\$25,000
One-Time Transition Deliverables	79	\$7,900
Program-Based Support	120	\$12,000
Contingency & Flex Tasks	50	\$5,000
Total	499	\$49,900

VI. Notes

- Budget assumes a gradual reduction in hours and responsibilities.
- Actual hours may vary depending on the new administrator’s onboarding pace and the level of support requested.
- All deliverables will be shared with both the incoming administrator and the LMRWD Board of Managers.
- This scope may be adjusted at the discretion of the Board if additional support is deemed necessary.