

Contract Management Case Study

Stabilizing High Volume Contract Portfolios Through Embedded Execution

Overview

Monterey partnered with a large state health and human services agency to stabilize and strengthen contract management operations supporting critical statewide programs. Facing staffing shortages, mounting backlogs, and elevated audit risk, the agency required immediate operational capacity and long term process improvement to protect funding and prevent service disruption.

The Challenge

The agency managed a complex portfolio of hundreds of active contracts and grant agreements across multiple divisions, funding sources, and program areas. Staffing constraints and fragmented processes limited visibility into contract status, deliverables, and renewal timelines.

As a result, the agency faced recurring contract lapses, delayed amendments, audit exposure, and the risk of interrupted services. Leadership needed a solution that could address immediate operational risk while building sustainable contract oversight.

The Goal

The agency needed to rapidly reduce contract backlog, restore visibility across the portfolio, and ensure contracts were executed, amended, and closed out in compliance with funding and policy requirements.

This work had to be completed without disrupting ongoing programs and while rebuilding internal capacity for long term management.

The Monterey Solution

Monterey provided Embedded Execution by integrating directly with agency contract, program, and fiscal teams. Rather than operating as an external advisor, Monterey assumed day to day responsibility for contract management activities while also redesigning workflows and controls.

Monterey organized the contract portfolio, implemented standardized templates and tracking tools, and established clear ownership for deliverables, amendments, and renewals. The team conducted contract reviews, supported invoice validation, and ensured alignment between contract actions and funding requirements.

In parallel, Monterey worked with leadership to identify inefficiencies, clarify roles, and document processes. This approach ensured immediate risk reduction while strengthening long term governance.

The Results

Monterey's embedded contract management support delivered measurable outcomes:

- Reduced potential contract lapses from hundreds per month to a manageable volume.
- Restored visibility into contract status, timelines, and deliverables across the portfolio.
- Strengthened audit readiness through standardized documentation and controls.
- Enabled uninterrupted delivery of critical health and human services programs.
- Built internal capacity through process documentation, tools, and staff mentoring.

Why It Matters

For public agencies, contract management failures can expose funding, interrupt services, and undermine public trust. Monterey's Embedded Execution model allows agencies to stabilize operations quickly while building systems that endure.

This engagement demonstrates Monterey's ability to manage complex contract portfolios at scale while balancing urgency, compliance, and long term operational improvement.