

CommonKnowledge

Summary Report:

San Mateo County Library-Based Dialogues on Shared Services September 2011

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OVERVIEW

Cities across California and nationwide are adapting to new fiscal realities, and are exploring ways to continue providing high quality services despite several years of declining revenues. In San Mateo County, a group of city managers have been meeting for some time to explore new ways of providing city services in light of continuing budget shortfalls. Building on a tradition of deliberative public engagement in the region, and thanks to Library Services and Technology Act Grant funding, this group of city managers collaborated with consultants from the Common Knowledge Group and The Peninsula Conflict Resolution Center to hold two exploratory community forums in September of 2011 on the topic of sharing municipal services.

Hosted at the Daly City and City of San Mateo libraries, each community forum involved 50 residents from cities across the county. Participants shared dinner, learned about the “new normal” fiscal realities that cities are facing, how they are adapting, and choices they are facing, including greater sharing of services across jurisdictions. After a question and answer session with city staff, facilitated small group discussions gave participants a chance to vocalize and more thoroughly explore what they saw as possible benefits of shared services as well their concerns. These initial dialogues were not meant to provide final or representative public input to city managers in San Mateo County considering shared services and other alternatives. They were instead designed to further each cities understanding of how best to educate and engage residents in the issue of alternative service delivery strategies and to provide some initial guiding principles for cities to keep in mind.



The hundred community members were active participants throughout the three hour session. Most were very positive about the value of the forums and indicated interest in the cities continuing to provide this kind of public education and engagement. They also demonstrated interest in taking additional steps such as sharing the results of the forum with others and attending a city council meeting. The hosting City Managers elected to pursue a grant to enable additional forums that built on these initial sessions.

ATTENDEES

Participating cities in San Mateo County were asked to invite and confirm a specified number of residents in proportion to their population. Some city managers sent invitation letters to randomly selected voters, while others chose to invite graduates of citizen academies or others who might be interested in participating. While some cities were more successful than others in recruiting participants, this approach was successful in generating a fairly representative mix of north county residents at a meeting in Daly City on September 8th and south county residents at a meeting in the City of San Mateo on September 13th. Residents from Daly City, Pacifica, South San Francisco, Brisbane, Colma, San Bruno, Millbrae, Hillsborough, Burlingame, Redwood City, Menlo Park, San Carlos, Belmont, and San Mateo participated in the forums. City managers and staff from many of these cities also attended the meetings in order to share information, answer questions, and listen to what people had to say.

AGENDA

At each three hour evening community forum, residents gathered at a library and were provided dinner before they were welcomed by the local city manager and thanked for their participation. Next, they were introduced to some basic ground rules for civil community dialogue, and asked to react to and agree to these ground rules. After a brief opportunity to share their interest in the session and what they valued most about their city with a partner, a city finance director gave a short presentation on city services and revenue sources, alternative ways that cities could provide services in order to maintain service levels with reduced revenues, and an explanation of and several examples of sharing city services already in place in San Mateo County. Participants asked some clarifying questions, and then were randomly assigned to tables of eight, each with a trained neutral facilitator tasked with collecting resident input on the topic of shared services. Most of the meeting time was used for these facilitated small group dialogues. High level city staffers were available to answer questions during these discussions, but they mainly listened to lively discussions among residents. At the end of each forum, a representative from each table shared a few key ideas that had surfaced in their discussion.



RESIDENT INPUT

At each meeting, participants were asked to share:

- What they saw as benefits of sharing services between cities/ other jurisdictions
- Concerns they had about shared services
- What other information they felt was needed to offer more informed input about shared services in San Mateo County

- Some guiding principles that they would like their city leaders to consider as they explore sharing services, and
- Other ideas that cities could consider in order to address budget shortfalls

Facilitators captured participant input on flip charts (see appendix B for complete flip chart input from both meetings), and attendees were also asked to share input in writing via individual worksheets. Notably, 99 of 100 total forum participants turned in a worksheet with feedback and an evaluation of their experience.

The following briefly summarizes the input collected in the small group discussions and is provided to show the range of ideas shared as well as the most prevalent. This is not meant to be a definitive synthesis of public perspectives; rather it represents the range of reactions and levels of understanding demonstrated at the two forums.

Benefits of Shared Services

- Potential for cost savings, increased efficiency, and maintaining or improving services
- Opportunity for cities to learn from one another and share their particular expertise/equipment
- Enhanced communications and cooperation among cities
- Allowing closest emergency service provider to respond regardless of jurisdiction
- Combining purchasing power for better pricing and access to expensive equipment
- Opportunities for creative approaches and innovative thinking
- Opportunities to think and address issues on a regional scale
- Consistency and continuity of service across region, realization that “we are all interdependent”
- Opportunity to consolidate management and rethink expensive entitlements
- Consolidated departments could provide more advancement opportunities for staff
- Could coordinate recycling efforts across the county
- Smaller cities especially might have access to better services and equipment

Concerns about Shared Services

- Will savings pan out, and/or will service levels go down?
- Losing local control and identity
- Fallout from culture clashes
- Losing jobs, good employees with useful skills
- How will combined services represent divergent values/philosophies of cities involved?
- Will it take longer for fire/ police to respond if I have an emergency? Will they know my area?
- What if both cities sharing an emergency service have crises simultaneously?
- “Little fish in bigger pond” phenomenon can de-motivate staff; lower staff morale
- Could be unfair if one city benefits more than another
- Staff will need to move and have new training, which could be expensive
- Staff could have longer commutes
- Will a service provider from another city care as much; will service become impersonal?
- Some equipment may not be appropriate for other cities
- Could lose institutional knowledge

Questions/ Other Information Needed

- Is sharing services different from outsourcing?
- How will we evaluate the effectiveness of sharing services; can we undo if it is not effective?
- Who would be in charge if multiple cities share a service?
- Has a long term cost benefit analysis been conducted? How much will we save?
- Will we end up paying people more for the same service; will salaries increase?
- How will the needs of my city be represented in a consolidated entity?
- How are libraries funded, and how was the Peninsula Library System formed?

- What criteria determine what cities will combine what services?
- If the economy keeps getting worse, what would the next step be?
- Does each city need a city manager?
- Why not explore new revenue sources?
- How will you communicate changes related to sharing services to the public?

Guiding Principles to Consider when Exploring a Shared Services Agreement

- Maintain or improve service levels and quality
- Engage residents (ongoing) to inform the process, reduce anxiety, ensure a smooth transition
- Start small, go slowly, make sure it will save money and not have unintended consequences
- Look for successful models/ best practices first, do cost benefit analysis
- Each city sharing services should pay their fair share each year
- Try to minimize negative impacts on local jobs and economy
- Explore and protect core issues/vision/desires for each city involved
- Consider human as well as financial impacts
- Have an exit strategy (analogous to a “pre-nup”)
- Develop ways to measure long term sustainability; consider how this will evolve over time
- Maintain/ keep best aspects of local control but reap benefits of a larger system
- Annual reviews of effectiveness, performance and safety of shared services
- Train staff to help them adapt and collaborate successfully and merge organizational cultures
- Put residents first; make sure it's the best way to meet the needs of the community

Other Ideas for More Efficient & Effective Service Delivery

- Work to increase resident volunteerism/ use more volunteers and interns
- Collaborate more with nonprofits
- Consider sharing services with the county or on a county level or contracting at that level
- Share equipment among cities or administration, set up joint purchasing agreements
- Identify alternative revenue sources
- Allow residents to donate for a specific service or park maintenance and beautification
- Reduce street sweeping where possible
- Change retirement benefits package system; ask employees to contribute
- Incentivize community service, ask large orgs. to provide matching grants for volunteers



PARTICIPANT FEEDBACK

Overall, participants gave positive feedback on the forums as a valuable way to inform and engage the community in the decisions cities are facing. Many volunteered comments that they appreciated that the community was being included in the planning. Participants demonstrated keen interest in learning more about city finances, especially costs associated with employee benefits and retirement. The fact that sharing services across jurisdictions has been so prevalent was new information for some and most wanted to see more specific information and “case studies.” See appendix A for a more detailed report on participant feedback.

NEXT STEPS

City Manager Pat Martel of Daly City has taken the lead on applying to the Davenport Institute (formerly Common Sense California) for additional funding to support four additional educational community meetings across San Mateo County in order to continue to engage the public as cities consider shared services agreements. The scope and plan for these meetings is to be determined, but there has been some discussion of the meetings being an open invitation, with supplemental recruiting through local organizations to ensure representative participation. The model of breaking bread together and then using a brief educational presentation with more in-depth facilitated small group dialogues in public libraries was successful (almost every participant stayed actively engaged throughout the three hour meetings and 99 of 100 turned in a worksheet/evaluation form), and would be improved up on in subsequent events. Greg Keidan (Keidan Consulting and The Common Knowledge Group) and Shauna Wilson-More (PCRC) have committed to continue collaborating in supporting next steps pending available funding.



APPENDIX A: PARTICIPANT FEEDBACK REPORT
9/8/11 Daly City & 9/13/11 San Mateo
Exploratory Community Forums on Sharing of Services

Participant feedback about the process and information provided

Note: Due to the small sample sizes, quantitative measures must be used with caution.

Overall Participation	9/8/11 Daly City	9/13/11 San Mateo
Total attendees (excluding observers/facilitators)	50	50
Total evaluation forms turned in	50	49

Prior Participant Knowledge (self-assessed)	9/8/11 Daly City	9/13/11 San Mateo
How familiar you are with the following topics (5= very familiar, 4 = somewhat familiar; 3 = in the middle; 2 = not very familiar; 1 = not at all familiar):		
• the condition of city finances in San Mateo County	Most 3's or 4's	2's, 3's and 4's
• the concept of "sharing services" between cities	Most 3's or 4's	Most were 4's, then 3's

Based on the quality of the conversations, it appeared that the many of the participants in the 9/8 Daly City forum had slightly less exposure to the topic than those in the 9/13 session. They were somewhat more likely to say the presentations increased their understanding of the issues. In the 9/13 session, participants were slightly more likely to rate the dialogue as helpful.

Post-Forum Evaluation	9/8/11 Daly City	9/13/11 San Mateo
How helpful was tonight's meeting in helping you understand the following: (5= very helpful, 4 = somewhat helpful; 3 = in the middle; 2 = not very helpful; 1 = not at all helpful)		
• the condition of city finances in San Mateo County	4.1	3.7
• ways that cities in my area are addressing budget shortfalls	3.5	3.3
• what "shared services" is and how it works	4.3	3.8
How helpful were the following portions of this evening's forum:		
• the presentation about city finances in San Mateo County	4.2	4.0
• the presentation about shared services	4.2	3.8
• table discussion #1 about your reactions to shared services	4.0	4.1
• table discussion #2 about guidelines and other suggestions	3.7	3.9
• large group closing discussion	3.7	4.0

Other Feedback	9/8/11 Daly City	9/13/11 San Mateo
Total Responses	50	49
How did you feel about the information that was presented tonight?		
• The information was too complicated.	0	0
• The information was somewhat complicated.	5	5
• The information was just about right.	27	28
• The information was somewhat oversimplified.	9	14
• The information was very oversimplified.	1	2
Which of these next steps are you likely to take? (multiple answers invited)		
• Look up my city's budget online	16	15
• Share the discussion with family and friends	24	33
• Attend another forum about this issue in a few months	19	25
• Attend a city council meeting	20	20
• Other	3	1

Open Ended Questions

Q. What was the most important thing you learned this evening?

REPRESENTATIVE COMMENTS from 9-8 Daly City

- That City Managers are meeting/working together and involving citizens
- The public has a role
- Others share my views
- That cities are in crisis
- How little money comes in from sales tax
- That it's possible to serve residents' needs at less cost
- The concept of shared services
- We need to join together to save money and services
- I met Peninsula neighbors
- It was an honor to be included

REPRESENTATIVE COMMENTS from 9-13 San Mateo

- Regional planning is better than insular planning
- That cities are facing a financial crunch.
- That shared services is not as bad as it seems.
- Shared services are very much needed.
- Who is already sharing services.
- Other citizens' concerns were excellent and really made me think.
- Hearing issues about other cities.
- That we residents are all worried about the same thing
- Considerations of local cultures/identities
- The county has thoughtful intelligent citizens.
- The issues are complex but there are many good ideas for dealing with them.

- The need to distinguish between outsourcing and shared services.

Q. What do other people in your community need to know about this issue?

REPRESENTATIVE COMMENTS from 9-8 Daly City

- More specific success stories about what was gained from shared services.
- It's better to share than lose.
- Not to be scared.
- How involvement will help them.
- They need to know the numbers we are dealing with. Many think cities are hiding money. Not true.

REPRESENTATIVE COMMENTS from 9-13 San Mateo

- How city government works.
- Case studies of shared services over the long term.
- Basic government overview as well as finance overview – and how Prop 13 fits in.
- More about city versus county services and incorporated versus unincorporated
- Structural problems in city budgets.
- Impact of changes.
- How this is going to affect their community.
- Where we are in the process.
- There is a lot of fear – and most if it stems from lack of knowledge of how already existing merged services have played out. My group has about 20 concerns, none of which have transpired in reality in any of the local already executed service mergers.

Q. Do you have any other suggestions?

REPRESENTATIVE COMMENTS from 9-8 Daly City

- More information on salaries and benefits
- Use volunteers
- Need public education on this topic
- More groups like this
- Have smaller groups for the discussion
- Thank you for engaging the community in this process and enabling us to be better informed and better citizens. EVERY community should do this.

REPRESENTATIVE COMMENTS from 9-13 San Mateo

- Shared services for green policy.
- Great meeting!
- Find other forums like this for people to get together for benefit of county.
- Provide more information about funding for pensions and health benefits.
- The format of this discussion was very effective.
- Put results in the local newspaper so all residents know what is being looked at.
- Find some way to get larger numbers of residents involved in the process.
- Outreach!!

APPENDIX B: FLIP CHART/ EASEL NOTES (COMPLETE)

Note: The following is a complete transcription of all notes taken by facilitators or volunteer scribes on the large flip charts/ easels at the 9/8/11 and 9/13/11 library dialogues. Items in () were added by the editor in an attempt to clarify intended statements, and items where the meaning was unclear to the editors were marked with an asterisk (*).

Additional individual input was collected in the form of worksheets that 99 of 100 participants handed in at the end of the meetings. Some of this input has been summarized in Appendix A. Complete copies of the 99 worksheets (and originals) are available to the city managers who collaborated in this public engagement effort by request.

Shared Services Community Forum #1, Daly City Library, 9/8/11

Table 1

Benefits

- Save \$
- Reduce overhead and admin costs and redundancy
- Greater opportunities for employee career path and more varied work
- More employee experience
- Better communication between cities; increase experience
- More job opportunities
- Could lead to increased service levels
- More cost effective and efficient
- Can allow closest service provider to respond regardless of jurisdiction
- Can share resources
- Keeping service public may increase accountability but may increase costs

Concerns

- Loss of control
- Don't know until you try it if it's more efficient
- Could lead to job losses in community
- May cause longer commutes
- Can service be as responsive if combined?
- Will we be paying people more for same service?
- May not realize savings if salaries go up
- May make communication more difficult
- Need time consuming and costly infrastructure to manage larger infrastructure
- Fear that critical services might not still be delivered smoothly

Questions

- How was Peninsula Library System formed?
- Could cities share landscaping services? (Can we model other shared services on this?)

- How are libraries funded?
- Can we test this with recreation, less essential services?

Considerations/Guidelines

- How can we find a balance to find the best in local control and also reap benefits of a larger system?
- Don't raise salaries and negate savings of consolidation
- Each city involved should pay fair share; keep checking this each year to keep fair
- Try to minimize negative impact on local jobs and economy
- Use some savings to create more local jobs
- Use savings to improve infrastructure or improve education

Table 2

Benefits

- Cost savings
- Get rid of redundancies
- Efficiencies
- Better, expanded, more responsive services
- Promotional opportunities

Concerns

- Some services (pool classes) may be impacted
- Easier to combine some than others
- Less responsive
- Loss of jobs
- Financial control/complications
- Does amount paid justify the benefit?
- Resistance to change
- Lack of credibility
- Would my city get its fair share?
- Less personal- more bureaucratic

Questions

- How do cities determine which cities to team with? -what criteria to use?
- If economies continue to decline- what's the step beyond sharing services (merge?)

Considerations/Guidelines

- Is it geographically feasible?
- All savings there?
- Are savings equally shared?
- Is technology compatible? (computer, radio)

- Determining cost distribution
- Administration

Other Ideas

- Consider how cities can control recycle-theft i.e. bottles/cans stolen out of trash
- Consolidating garbage services
- Where possible reduce street sweeping
- Identify alternative revenue sources
- More volunteers

Table 3

Benefits

- Best of each city; learning and sharing others needs
- Community grows
- Awareness of hardships
- Learning to share
- Saving money
- More efficiency
- Employees/benefits
- Equipment
- Group purchasing power
- Tech expertise
- More best practices/standard costs?

Concerns

- Will sharing services result each city involved bringing their best assets to bear?
- House numbers
- Idiosyncrasies; learning curve
- Confusion of services
- Losing services or promptness of delivery of services
- Loss of trust/caring
- Spreading resources too thin
- Could lose employees and benefits
- Fear of change
- Instead of improvement, might be deterioration
- Dispatchers confused (relates to house numbers comment above?)

Questions

- What savings will be realized with shared services
- Pensions/retirement funds of city workers

Considerations/Guidelines

- Use Best Practices as benchmark (**consolidation fits?*)**
- Improvement, not deterioration
- Strive to maintain best service level
- Evaluate cost and benefits of services
- Use historical trends of city support costs versus services
- Demographics – elders services versus child services

Other Ideas

- Insurance savings by joint purchase
 - Property, etc.
 - Liability
- Lower fees for investment

Table 4

Benefits

- NCFA has turned out to be “good” *(**what is NCFA?**)
- NCFA savings in cost
- Efficiencies=consistency of combining functions
- Fire & police, especially whoever is near
- Access equipment & tech that would otherwise be too expensive
- Do with planning, etc. (other groups as % of budgets increase, may get more power, although these may be outsourced now) *?
- Streamline permits & enhance responsibility

Concerns

- Will subgroups get lost?
- Benefits must be explained, otherwise may not be accepted
- Some equipment may not fit (e.g.: Daly City fire trucks too big for Brisbane)
- Will we (as the minority stakeholder) get the same access to services?
- Staffing concerns: which persons hours are we eliminating?

Question:

- Are the services to be combined the same across cities?

Considerations/Guidelines

- Is each side financially solvent?
- Education to/with the public, to prevent bias.

- Provision for supervising contractor
- Comparing costs between shared services vs. other options
- There should be some commonality between cities sharing services, like scale and philosophy
- How to share costs (could base on employee numbers, level of service required, etc.)
- Maintaining core values
- Be careful of outsourcing: cost and oversight

Other Ideas

- Insourcing
- Combine street sweeping

(Table 5 was merged into other tables)

Table 6

Benefits

- (ability to provide) what everyone needs
- Saves money
- Eliminates deficits
- Services don't have to be cut
- Broader range of and access to services
- Improve services
- Cuts waste

Concerns

- Harder to access services?
- Loss of jobs, (department) closures
- Will we lose any safety services?
- Lose local identity
- Service becomes impersonal
- Lack of understanding about community being served (cultural and ethnic)
- More bureaucratic

Questions

- Define "shared" – upper management? Buildings? Will shared departments have same job rules?
- Double dipping? Would it be prevented?
- Who is accountable for the quality of management?

- What are the retirement benefits for city employees? What happens to them?

Consideration/Guidelines

- How would you determine how much money each city contributes? Could have negotiations, be based on population, how many jobs are being saved, how much \$ is saved by each city
- What are the core issues for each city? Will they be protected?

Table 7

Benefits

- Cost savings
- Efficient
- Employee retention
- Less management
- Better training
- Equity better spread across cities services

Concerns

- Loss of identity
- Representation of individual cities in consolidated entity
- Loss of knowledge at local level, mix ups.

Considerations/Guidelines

- Demonstrate savings
- Look to other cities with successful models.
- Level of service needs to be maintained
- Look to community to inform the process and ensure a smooth transition

Ideas

- Use of internships across cities
- Larger scale consolidation
- Merge administration

Table 8

Benefits

- Better than losing services
- Saves \$ in challenging times – Peninsula library system is a good example

- Better services
- Increased service
- Cross pollination
- Can bring new approaches –creative thinking
- Cooperation could generate better service possibilities
- Valuable to have community input up front/ appreciate opportunity to give feedback

Concerns

- Institutional knowledge could be lost
- Too much focus on profit and loss bottom line rather than best practices
- Things could fall through the cracks – poorly defined responsibilities
- Job loss – people impacted
- How to balance delivery of services
- Balance of equitability, will one town have more expenses without as much benefit?
- Each city has it's own priorities
- Maintaining personal identity
- Losing a personal touch – knowing who you are talking with
- Service providers may not be as familiar with our town/community

Consideration/Guidelines

- Size of shared services: start small – city to city/ not entire county
- Maintain within sound financial benefit
- Go slowly, no broad strokes- e.g. Brisbane fire fighters join North County, incorporate current employees into shared services
- Customize changes to fit each city
- Keep people involved & invested- ask the community for input
- Keep being mindful of customer service
- Anything we could share should be considered for sharing
- Obligation for each city to fund core services/assessments
- Insurance on your community
- Could be voted on
- Encourage citizen responsibility and obligation for funding services

Other Ideas

- Adopt a park model for services (beautification)
- Emphasize volunteerism
- Credits for community service

- Big institutions (could provide?) matching grants for community service credits
- Option to permit people to fund specific beautifications or areas or services – donating to specifics rather than general fund

End of Session Group Report Out

Benefits

- Saving money!
- Cost savings
- Public libraries/ No county fire as examples
- Efficiency
- Consistency
- Makes sense
- Better standards
- Efficiencies created thru sharing of services

Concerns

- Loss of control
- Subgroups lost? What happens to small communities? And community feel?
- Loss of jobs
- How much money are we actually saving?
- Will services be as effective? Able to access? Think about cultural issues?
- Loss of identity. Loss of local knowledge. Loss of institutional knowledge.
- Better to combine than lose altogether

Guidelines/Considerations

- Look at models of shared services
- Find balance between local control
- Equity across cities
- Services will improve, not deteriorate
- Evaluate costs and benefits
- Capital investment – joint with other cities
- Look for commonalities in sharing of services
- Broader services? Access to those services?
- Cultural/ethnic considerations
- Maintain personal touch

- Compatible equipment
- Oversight of contracts with outside vendors
- Allocation of assessments particular to a community – Keep in mind
- Refer to examples of shared service models (and note that San Mateo County is actually a national leader in this work)

Ideas

- Are there things (street sweeping) we can reduce?
- City employee contribution to retirements

Shared Services Community Forum #2, San Mateo Library, 9/13/11

Table 1

Benefits

- Maintaining service levels
- Cost mitigation
- Regional vision better than insular planning
- Consider what's best for region
- Better meet citizen's needs
- Span of control – management – consolidate positions
- Reliability, predictability of service throughout region – McDonald's hamburger is defined – known quantity
- Level of service can go up (San Mateo/ FC fire)
- Consistency with one standard
- Economies of scale
- Regional planning

Concerns

- Losing City identification
- Risk of failure
- Impact on other services (eg Recology if goes on strike)
- Domino effect on other (unshared) services
- Will savings pan out?
- Accountability? Effective?

- Poor service delivery
- How to collectively determine essential services? How define? What qualifies?
- Will level go up or down? Will level meet expectations?
- Level of service can go down?
- How do shared services adjust to changes in a city's social/demographics – needs change
- Are we talking shared services or outsourcing? Outsourced employees not as well cared for
- Growth strategies are different from one city to another, micro-regions

Questions

- Does every city need a city manager?
- Does one size fit all?
- When do shared services make sense? Must everything be a shared service?

Considerations/Guidelines

- Define which service(s) should be shared
- Develop SLAs *(note: WHAT IS AN SLA?)
- Make sure it's cost effective – saves money
- Have a back out plan (with arbitration process)
- Ongoing annual review of the shared service to make sure it's delivering
- One city with special services can earn revenue by providing to other cities – would encourage cities to develop expertise
- What studies have been done by consultants? What are best practices?

Other Ideas

- Possibilities of self-funding, e.g.: health care insurance, (Stanford University is doing), car insurance, etc.
- Red street lighting

Table 2

Benefits

- More efficiencies
- Cost savings

- o Improved service
- o Lower taxes
- o The best level of service is not necessarily the city level

Concerns

- Reduced services
- Worse service
- Evaluation – is it worth it? How to do it?
- Measurement of goals
- Who's in charge
- Loss of local control
 - o Difficulty in deciding which city gets what – conflict resolution
 - o Deciding what services to consolidate to receive most benefit

Questions

- How do you decide which city gets what?
- Emergency – FIRE, POLICE, MEDICAL – response coordination. WHO's in charge?
- How do you distinguish between what is important and what is TRIVIAL
- Where is the money going to come from – i.e.: Who funds/how financed?

Considerations

- Consolidate trivial things, not important things
- Identify secondary or unintended consequences, ie: rating of fire insurance/flood insurance levees before the sharing occurs
- Certain services (ie: transit/environmental/bay levees) may have a higher level of delivery and/or coordination than cities can provide

Good Ideas

- (Use more) Volunteers
- Collaborate more with non profits
- Plan capital projects so that services are actually delivered, ie: library

TABLE 3

Benefits

- Utilize specialists
- Lower costs (operating)
- Greater efficiency
- Opportunity for innovative thinking and ideas
- 911 calls centralized
- Specialized areas
- Could combine IT departments
- Change to Recology > \$ saving purchasing power

Concerns

- Lack of control (when consolidating)
- Reduced services
- What if it doesn't work out?
- Culture clash
- Lack of control over costs, personnel benefits to whole spectrum
- Loss of good people and skill sets
- Competition
- No long term cost/ benefit analysis
- Losing control over negotiations
- Loss of identity
- Could be hidden costs, unfunded liabilities that cities might not know about
- Cost allocation formula
- Relationship problems between Belmont and San Carlos, as people changed it got worse
- Using a cookie cutter formula in cities with different values
- What if a city doesn't want to share?
- Its unknown if there are really benefits, need more recent examples from cities> need more case studies
- If fire services are shared, will it take longer for a response in an emergency?
- Services are part of what makes cities unique (parks and rec. example)
- People involved in decision-making will change
- Loss of service level/ performance
- Can they handle the number of calls? What if there is a crisis at the same time in the two cities sharing a service?

Questions

- Would sharing services lead to greater efficiency?
- If my city merges a service with a smaller city, what does the smaller city have to offer?

Guidelines

- Consider human as well as financial impact
- Evaluate safety and performance 1 year after
- Need carrots and sticks
- Define how you share authority/ control
- Maintain current service levels and aim to improve them
- Need an exit strategy
- Don't jeopardize property values
- Each cities vision should not be jeopardized over or because of shared services
- Consider aesthetics
- Keep quality of parks and rec., provided participation is high

Other Ideas

- Identify other special services
- What can you consolidate behind the scenes?
- Rework retirement packages

TABLE 4

Benefits

- New efficiencies and ideas
- Joint conversations
- Cost savings
- Flexibility on unknown economic conditions
- Learning experience to expand on concept
- Better Access to Expensive Services
- Better response to local catastrophes (response time, health, police, etc.)
- Necessity to have shared services
- Reduce personnel costs
- Procurement benefits
- Eliminates boundaries (way of thinking and physical)

Concerns

- Savings will be used up
- Better response to local catastrophes (response time, health, police, etc.)
- Less local control of service
- Lower performance
- Overtime prioritization of larger cities
- Loss of city culture; identity
- Increased unemployment

- Financial liability of cities sharing service

Question

- How do we define “more efficient”

Guidelines

- Identify a service delivery plan
- Solid analysis
- What is the exit strategy
- Contingency planning
- Know what each city wants before sharing services
- Look beyond cost savings, e.g. how will service levels be affected
- How will financial status of residents affect relative services

Other Ideas

- Eliminate or modify Prop. 13
- Contract police, fire services
- General sharing of fire services, have map that shows every firehouse in county
- Share by county, not city to city
- Overlap with the county services, not just between cities
- Consider incorporating unincorporated areas

Questions

- How will it be implemented?

TABLE 5

Benefits

- Cost savings
- Improved services and opportunities
- Less management
- Improve services
- Reduce maintenance costs
- New ways to provide services
- More cross training

Concerns

- Lack of local knowledge & attachment
- Displacement of personnel, resulting in less efficiency
- “Little fish in big pond” phenomenon which de-motivates staff
- Losing community outreach
- Less community pride
- Decreased quality of service, e.g. longer response times for fire, EMT, police
- Disruption to lives of city employees
- Poor morale and high turnover of staff
- More work, less pay for staff
- Need time to implement and communicate changes and to achieve maximum efficiency
- Need for retraining (added expense)
- Expense of moving locations

Questions

- Why not explore more revenue sources?
- How to communicate shared services (changes?) to the public?
- Will costs increase as a result of shared services and be passed on to citizens?

Guidelines

- Develop ways to measure the long term sustainability.
- Consider modeling on a larger entity that successfully shares services
- Maintain local control
- Maintain service quality standards (important)
- Out source open positions
- Importance of implementing well
- Maintaining community connections (important)
- Solicit input from staff (on-going)

Other Ideas

- None recorded on flip charts

TABLE 6

Benefits

- Saving \$ (fire, police)
- Higher level of service
- Higher efficiency
- More cost effective than status quo

- Greater sense of continuity across cities; “we’re all interdependent”
- More utilization of high value & limited resources
- More negotiating power with cable, electric utilities
- Buy smarter and better (not just cost)- making better choices
- Larger pool of personnel (police)
- Police- more patrols/eyes/vehicles, better response/action, more resources and communications related to crime
- Sense of “mutual aid”

Concerns

- Unfair if one city benefits more
- Less personal service
- Unwanted services bundled vs. a menu of services to choose from
- Can we get out of this arrangement if it doesn’t work?
- It could turn out to be less efficient
- Can cities agree on performance criteria
- Less familiarity with neighborhood routes could increase response times (fire, police)
- Increased departmental responsibilities could lead to more stress and less efficiency
- Layoffs
- The Sheriff’s Dept are less familiar faces than city police
- Reduced civic/city pride and identity
- Citizens need to know

Questions

- What does shared library services mean?
- How can we get out of this arrangement if it doesn’t work?
- How recast cost over time? *not sure what this means
- Can small towns survive?
- What about edges of cities and “between geographic limits” *(unincorporated areas?)
- Can we still have city specific services?
- Can we maintain ownership/ city logo?
- Would we respond to fire, police the same
- Accountability/ Identity

Guidelines

- Consider a short contract to try things out
- Consider Identity- local/ countywide branding
- Educate the public on changes to reduce anxiety, address negatives, show results, pros and cons

- Address rationales and philosophy of services in each community involved.
 - Serve and protect
 - Enforce
 - Fire protection vs. medical
- Train staff how to share across cities; have new training to ease transition
- Merge corporate cultures; develop a new mission statement (collaboratively)
- What about utility work/public works/waste services might be easier?

Other Ideas

- Other services
- Changing rules for cable services- more cities = more strength in negotiations, power, voice
- Ala carte approach not appreciated- user fees for residents
- Using volunteerism
- CERTs
- Analytical worth
- Community outreach

TABLE 7

Benefits

- Reduced costs
- Standardized service
- Higher efficiency
- Higher quality service
- Bargaining units can't play one against the other

Concerns

- Level of responsiveness
- Clarity about boundaries
- (shared services) might not account for distinctions, e.g is equipment appropriate to terrain, hills vs. flatlands
- Cultural differences
- Are administrators trained to consider and negotiate?
- Standardized training
- Consistency of communication
- Equitable financing from socioeconomically different cities

Questions

- How is this different from TAC 1 Tac 2 etc? *don't know what this refers to
- Who will analyze this data?
- How can we focus on the revenue side?

Guidelines

- Train administrators in a standardized way, including about cultures of different cities involved
- Research best practices and do evaluation- establish criteria and create a matrix, figure out what worked before moving forward
- Do a cost/ benefit analysis, consider quality of customer services, responsiveness
- Keep the public informed: communication and education
- Keep in mind socioeconomic and cultural considerations
- Consider human factors
- Consider how this will evolve over time
- It is helpful to have a community policy. Consider how that will change
- Youth and police might have a relationship?

Other Ideas

- Contracting at the county level
- Sharing equipment among cities
- Cities could pay proportionally for shared services
- Small business incubators... example of Comcast wiring buildings in San Mateo

TABLE 8

Benefits

- Cost savings
- F.C. (Foster City?) model. Benefits of training residents and citizen engagement (e.g. CERT)
- Restructuring might be an opportunity to address concerns about too many supervisors & entitlements in place (e.g. police) and to improve services (e.g. fire)
- Could be an opportunity to coordinate recycling services (school districts)
- Eliminating levels of management
- Less front line service providers

Concerns

- Relationships

- Look at benefits to residents, not politics
- Politicians' fear of losing power
- It might be a wrong assumption that consolidating saves \$
- Preparation for a large catastrophe
- F.C. (Foster City) example of too many supervisors (police) and entitlements in place

Guidelines

- Make sure it is the best way to respond to the perceived needs of the community
- City commits to put residents first- above employees; public benefit is job #1; cities are too prone to cut services to residents rather than entitlements
- Work on generating public will
- Address traffic problems on a regional basis

Other Ideas

- Could have one fire and one police department for the county

End of Session Group Report Out

Benefits

- Table 1: Reliability, consistency, predictability
- Table 2: Cost savings, efficiencies
- Table 3: Cost efficiency. Using specialists
- Table 4: Ability to be flexible – economic and natural disaster conditions
- Table 5: Cost savings – opportunity for smaller cities to get more/better services
- Table 6: Cost savings – better purchase/use of critical resources
- Table 7: Cost efficiency/ community relationships across shared services
- Table 8: Reduce cost and maintain service level

Concerns

- Table 1: Define essential services; equity and consistency of services across communities
- Table 2: What services to consolidate – how to decide; and loss of local control
- Table 3: Don't lose values; what drew people to each community
- Table 4: Loss of local control and identity, unique programs
- Table 5: Loss of quality, standards, community attachment
- Table 6: Philosophies of service need to align across communities
- Table 7: How to split financing equitably

- Table 8: Politicians and others losing power will take it out on citizens

Considerations/Guidelines

- Table 1: Clear definition of shared service
- Table 2: Identify secondary consequences
- Table 3: Current guidelines remain in place, not worsen benchmark
- Table 4: Good exit strategy
- Table 5: No loss of standards; keep quality
- Table 6: Address identity; clear who is represented
- Table 7: Follow best practices; capacity of volunteerism; focus on increasing revenue
- Table 8: Put residents first- above employees
- Level of service
- Collect data from cities who are/have shared services, learn from them
- Define service level agreements, annual review to manage/monitor agreement
- Training employees on merging cultures
- How manage retirement funds

Themes – Other

- Changing level of services – police uniform and trust/confidence, some gain/loss trust
- Already more service/activity w/ city sheriff vs. San Carlos
- Document results of existing share agreements/data
- Lessons from Belmont/San Carlos dissolution, waste agreements – case studies
- Review/monitor progress
- Some standards that differ “don’t matter”, focus on those
- Pay attention to merging two cultures; process plan for integration/training
- Defined SLA with annual review – monitor performance
- Some differences don’t make a difference. Some do. Some things can’t be standardized, some shouldn’t (community value-based)
- Cities have different retirement plans. How to deal with shared services in HR?

Questions

- How to manage pension plans- 10%/5% if consolidate/if split? (See Brisbane; San Carlos; Pacifica)
- Looking at examples of existing, county long-term shared services – What worked, what didn’t. Why?