



## Transportation Committee

November 8, 2012

### Shared Services & New Initiatives Task Force Update

**Issue:** This is an information item to update the Committee on the Task Force discussions.

**Recommendation:** None; this item is for information only.

**Discussion:** In January, Board Chair Hill established the Shared Services & New Initiatives Task Force. This item provides an update on the Task Force's work to date. The December 6 Board Retreat will focus more on SACOG's involvement in shared services going forward. City managers and county executives from our region will be invited to participate in the retreat.

There are three main reasons for considering shared services: cost savings, efficiency, and service improvement. Since April, the Task Force has discussed opportunities for shared services, with staff and board member presentations about best practices and case studies. Staff has done extensive research on shared services, looking within the region, statewide, and nationally, at both services offered and different structures for providing those services. Staff has also reviewed what other Metropolitan Planning Organizations (MPOs) and Councils of Governments (COGs) provide for their members.

This fall, SACOG administered a survey to regional managers (city managers and county executives). Attachment A represents participant response to survey questions, which asked where jurisdictions are currently participating in shared services or would find value in a shared service by general service categories. Attachment B represents participant value responses to a list of specific services for consideration as a shared service. Attachment C is an analysis of the aggregate responses represented in Attachments A and B, ranking high or very-high value for specific shared services of over 61% (green), 55 to 61% (yellow), and from a list of general service categories cross-rankings of high interest/low activity currently (X). Over the last several weeks, the Task Force used this information to discuss where to begin a regional dialogue of shared services. SACOG staff has also discussed the results with regional managers. Staff heard interest from the Task Force and regional managers in beginning detailed shared services discussions, starting with focus groups involving jurisdictional staff.

On November 8, the Task Force met to discuss guiding policy principles, shared service concept proposals, ongoing support activities, and the Board Retreat. At the Task Force for shared services request, staff prepared a 2012 Task Force Activities Summary (Attachment D) to advise Committee members of the work and discussions to date. Staff prepared a summary of the policies that have guided SACOG's participation in new initiatives and how shared services fit within SACOG's existing Strategic Plan (Attachment E). The Task Force also discussed specific concept proposals, which will be the subject of more detailed discussion at the Board Retreat.

Approved by:

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MM:RS:ts  
Attachments

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**General Service Categories: Interested in Shared Service vs. Existing Shared Service  
(Draft October 11, 2012)**

General Service Category	Column 1	Column 2
	My organization may be interested in shared services in this service area	My organization currently shares this service
Fleet/Facility Management	61%	4%
Human Resources	57%	0%
Development Services	54%	4%
Planning/Zoning/Permitting/G.P. Support	50%	0%
Procurement Services	46%	4%
Information Technology	57%	14%
Streets and Sanitation	46%	7%
Disability Services	32%	0%
Public Works	43%	11%
Clerk Services/Archiving/Doc. Sharing	32%	4%
Parks and Recreation	39%	11%
Economic Development	54%	29%
Finance and Accounting	25%	7%
Gen'l Counsel/Risk Mgmt/Contr.Template	32%	21%
Budget and Management	11%	0%
Business Affairs/Consumer Protection	14%	4%
Gov't Affairs/Joint or Regional Advocacy	36%	29%
Public Health	21%	14%
Water Management	29%	21%
Human/Social Services	21%	18%
Police	18%	18%
Housing/Fair Housing Educ.and Enforc.Svc	29%	32%
Emergency Management	36%	50%
Fire/Emergency Medical Service	32%	46%
Transportation/Transit	32%	54%
Library	18%	54%
Animal Care and Regulation	21%	71%

Source: SACOG, October, 2012

Based on responses by SACOG Board members and local government managers to Shared Service survey, administered in September 2012, with 25 respondents from 22 jurisdictions providing substantive responses.

**Board/Managers Survey Responses to Specific Services Questions: % in Each Category (Draft October 9, 2012)**

Please indicate using the 1 to 6 scale, indicate how much you believe that each item should be provided as a shared service, regardless of who the service provider would be, and regardless of whether it would be performed on a regional level or a sub-regional level:

Ref #	Answer Options	6. Very High Interest	5. High Interest	4. Medium Interest	3. No or Low interest	2. Do NOT support this as a potential shared	1. Don't know/need more information	Response Count
Budget 1	Grant application coordination – promote regional or sub-regional application coordination	21%	25%	46%	4%	4%	0%	24
Budget 2	Grant writing – Develop cross-jurisdictional teams to write sub-regional or regional grant applications, lowering the cost to each individual jurisdiction while increasing the chance of success through cooperative submissions	24%	24%	44%	4%	4%	0%	25
Budget 3	Information sharing and coordination of service level planning and level of service standards	8%	38%	29%	17%	0%	8%	24
Dev 1	Compiling all local government development impact fees into a common database and identifying commonalities/differences and best practices	19%	38%	35%	4%	4%	0%	26
Dev 2	Analysis tools to help local government assess the local government fiscal impacts of planning choices	24%	28%	40%	4%	0%	4%	25
Dev 3	Promoting best practices and developing a regional toolkit for the development of infrastructure plans and/or financing districts	24%	44%	20%	8%	0%	4%	25
Econ 1	Growth projections (regional and subregional)	36%	28%	32%	4%	0%	0%	25
Econ 2	Housing market demand research	24%	28%	40%	8%	0%	0%	25
Econ 3	Retail market demand research	32%	20%	36%	12%	0%	0%	25
Econ 4	Research on opportunities for employment growth, and the types, amount and location of land supply to encourage employment growth	32%	28%	28%	12%	0%	0%	25
Econ 5	Research on development economics for different sub-areas of the region (urban, inner and outer ring suburban, rural)	32%	36%	20%	8%	0%	4%	25
Fin 1	Coordination of Financing authority (bonding)	8%	12%	40%	28%	0%	12%	25
Fin 2	Pooled purchasing of services (e.g., various consulting services)	8%	36%	32%	20%	0%	4%	25
Fin 3	Pooled purchasing of materials (e.g., fuel)	12%	48%	28%	8%	0%	4%	25
Fin 4	Pooled purchasing of equipment (e.g., vehicles)	12%	48%	24%	12%	0%	4%	25
Fin 5	Pooled insurance/risk management	22%	17%	30%	26%	0%	4%	23
Gov Aff 1	Provide facilitation/mediation services subregionally to local governments and partner agencies to help form agreements for common action	12%	24%	36%	16%	4%	8%	25
Gov Aff 2	Regional ombudsman with state agencies on project delivery	12%	16%	40%	16%	12%	4%	25
Gov Aff 3	Regional ombudsman with federal agencies on regulatory impacts	12%	20%	44%	12%	8%	4%	25
Gov Aff 4	Shared services JPAs, MOUs and contracts: Compile and keep updated an inventory of existing JPA bylaws, MOUs, and contracts between local government and partner agencies that set forth the methods for shared services delivery	16%	32%	40%	12%	0%	0%	25
Gov Aff 5	Inventory local government and JPA approaches to state advocacy (i.e. advocate/consultant contracts, staff) and determine if there are opportunities to consolidate or better coordinate this function subregionally or regionally	12%	28%	36%	20%	4%	0%	25
Gov Aff 6	Inventory local government and JPA approaches to federal advocacy (i.e. advocate/consultant contracts, staff) and determine if there are opportunities to consolidate or better coordinate this function subregionally or regionally	16%	24%	32%	24%	4%	0%	25
HR 1	Compile and keep updated all local government and JPA compensation surveys into a common database	16%	48%	24%	12%	0%	0%	25
HR 2	Provide coordination services to assist local governments and JPAs to find cost-effective ways to consolidate compensation surveys	16%	44%	24%	16%	0%	0%	25
HR 3	Collective Bargaining Agreements: Compile and keep updated all local government, transit agencies, and JPA compensation agreements in a common database	20%	28%	28%	20%	4%	0%	25
IT 1	Website and Web services support	29%	33%	25%	8%	4%	0%	24
IT 2	Demographic forecast and land use forecast mapping site to assist agencies with grant applications, infrastructure and school facilities planning	28%	32%	28%	12%	0%	0%	25
Nat Res 1	Compiling existing local government Climate Action Plans into common database and identifying commonalities/differences and best practices	20%	28%	36%	16%	0%	0%	25
Nat Res 2	Providing technical support for local government Climate Action Plans	20%	28%	36%	16%	0%	0%	25
Nat Res 3	Providing communication and coordination support to local governments on Climate Action Plans to identify opportunities for joint action, either subregionally or regionally	20%	20%	48%	12%	0%	0%	25
Nat Res 4	Technical Support for local government natural resources planning (e.g. Habitat Conservation Plans, Integrated Water Planning, open space plans)	20%	28%	40%	12%	0%	0%	25
Nat Res 5	Providing subregional and/or regional resource inventories (GIS maps and data)	16%	32%	40%	12%	0%	0%	25
Nat Res 6	Local governments working alongside state and/or federal resource agencies to maximize influence	24%	20%	40%	12%	0%	4%	25
Plan 1	Developing a regional information sharing network for School Facility Planning	8%	16%	32%	36%	0%	8%	25
Plan 2	Interactive citizen engagement tools for local plans	16%	24%	44%	12%	4%	0%	25
Plan 3	Growth projections (population and land use) for local plans	24%	40%	32%	4%	0%	0%	25
Plan 4	Traffic impact modeling and analysis for local plans	28%	32%	32%	8%	0%	0%	25
Plan 5	Air quality impact modeling and analysis for local plans	32%	32%	32%	4%	0%	0%	25
Plan 6	Technical support for maximizing CEQA streamlining benefits from SB375 for local plans	32%	32%	28%	4%	4%	0%	25
Plan 7	Support to local governments in preparing common local government planning documents like General Plans, Housing Elements, Specific and Community Plans (and their EIRs)	36%	20%	24%	12%	8%	0%	25
Plan 8	Compiling all local government zoning codes related to infill development into a common database and identifying commonalities/differences and best practices	36%	12%	28%	20%	4%	0%	25
Plan 9	Provide facilitation services for local government community and stakeholder engagement activities	20%	24%	28%	24%	4%	0%	25
Plan 10	Planning-related Website and Web services support	20%	16%	36%	24%	4%	0%	25
Plan 11	Feasibility analysis of the region's food system infrastructure (eg, processing and distribution).	24%	16%	28%	24%	8%	0%	25

## Potential for Regional Shared Services (Draft October 11, 2012)

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Service Categories	Survey Response - Interest Level <sup>1</sup>	High Interest/Low Current Shared Service Activity <sup>2</sup>	Reference #	Specific Service	Notes on Potential SACOG service: Explanation on whether SACOG currently provides related service; whether via MPO and/or COG function <sup>3</sup>
<b>Data/ Information</b>	●		Econ 1	Growth projections (regional and subregional)	MPO function - MTP service with possibility for expansion
	●	X	Plan 3	Growth projections (population and land use) for local plans	MPO function - MTP service with possibility for expansion
	●	X	Plan 5	Air quality impact modeling and analysis for local plans	MPO function - MTP service with possibility for expansion
	●	X	Plan 6	Technical support for maximizing CEQA streamlining benefits from SB375 for local plans	MPO function - SCS related service with possibility for expansion
	●	X	HR 1	Compile and keep updated all local government and JPA compensation surveys into a common database	Potential COG function - new potential service
	●	X	IT 1	Website and Web services support	MPO/COG - existing service for one transit agency; new potential service to members
	●	X	Plan 4	Traffic impact modeling and analysis for local plans	MPO/COG - new potential service
	●		Econ 4	Research on opportunities for employment growth, and the types, amount and location of land supply to encourage employment growth	MPO/COG function - MTP service with possibility for expansion
	●	X	IT 2	Demographic forecast and land use forecast mapping site to assist agencies with grant applications, infrastructure and school facilities planning	MPO/COG - related function to MTP service with possibility for expansion
			Econ 2	Housing market demand research	MPO/COG - related function to RHNA service with possibility for expansion
			Econ 3	Retail market demand research	MPO/COG - related function to MTP service with possibility for expansion
			Nat Res 2	Providing technical support for local government Climate Action Plans	MPO/COG - related function to MTP service with possibility for expansion
			Nat Res 4	Technical Support for local government natural resources planning (e.g. Habitat Conservation Plans, Integrated Water Planning, open space plans)	MPO/COG - related function to MTP service with possibility for expansion
			Nat Res 5	Providing subregional and/or regional resource inventories (GIS maps and data)	MPO/COG - related function to MTP service with possibility for expansion
	X	Plan 8	Compiling all local government zoning codes related to infill development into a common database and identifying commonalities/differences and best practices	MPO/COG - new potential service	
<b>Coordination/ Collaboration</b>	●	X	HR 2	Provide coordination services to assist local governments and JPAs to find cost-effective ways to consolidate compensation surveys	COG - new potential service
	●	X	Dev 1	Compiling all local government development impact fees into a common database and identifying commonalities/differences and best practices	MPO/COG - new potential service
			Nat Res 1	Compiling existing local government Climate Action Plans into common database and identifying commonalities/differences and best practices	MPO/COG - new potential service
			Gov Aff 4	Shared services JPAs, MOUs and contracts: Compile and keep updated an inventory of existing JPA bylaws, MOUs, and contracts between local government and partner agencies that set forth the methods for shared services delivery	COG - new potential service
			HR 3	Collective Bargaining Agreements: Compile and keep updated all local government, transit agencies, and JPA compensation agreements in a common database	COG - new potential service
			Budget 3	Information sharing and coordination of service level planning and level of service standards	COG - new potential service
			Gov Aff 5	Inventory local government and JPA approaches to state advocacy (i.e. advocate/consultant contracts, staff) and determine if there are opportunities to consolidate or better coordinate this function subregionally or regionally	MPO/COG - new potential service
			Gov Aff 6	Inventory local government and JPA approaches to federal advocacy (i.e. advocate/consultant contracts, staff) and determine if there are opportunities to consolidate or better coordinate this function subregionally or regionally	MPO/COG - new potential service
			Nat Res 3	Providing communication and coordination support to local governments on Climate Action Plans to identify opportunities for joint action, either subregionally or regionally	MPO/COG - new potential service
		X	Plan 10	Planning-related Website and Web services support	MPO/COG - related to current GIS and web services with possibility for expansion
			Gov Aff 1	Provide facilitation/mediation services subregionally to local governments and partner agencies to help form agreements for common action	COG - new potential service
			Gov Aff 3	Regional ombudsman with federal agencies on regulatory impacts	MPO/COG - related to current legislative activities with possibility for expansion
			Gov Aff 2	Regional ombudsman with state agencies on project delivery	MPO/COG - related to current legislative activities with possibility for expansion
			Plan 1	Developing a regional information sharing network for School Facility Planning	COG - new potential service
		Fin 1	Coordination of Financing authority (bonding)	MPO/COG - new potential service	
<b>Planning / Policy</b>	●	X	Dev 3	Promoting best practices and developing a regional toolkit for the development of infrastructure plans and/or financing districts	MPO/COG - new potential service
	●		Econ 5	Research on development economics for different sub-areas of the region (urban, inner and outer ring suburban, rural)	COG - potential new service related to MTP/SCS activities
		X	Plan 7	Support to local governments in preparing common local government planning documents like General Plans, Housing Elements, Specific and Community Plans (and their EIRs)	MPO/COG - new potential service
		X	Dev 2	Analysis tools to help local government assess the local government fiscal impacts of planning choices	MPO/COG - new potential service
			Nat Res 6	Local governments working alongside state and/or federal resource agencies to maximize influence	MPO/COG - related to legislative activities with possibility for expansion
			Plan 9	Provide facilitation services for local government community and stakeholder engagement activities	MPO/COG - related to current Blueprint activities with possibility for expansion
			Plan 2	Interactive citizen engagement tools for local plans	MPO/COG - new potential service
			Plan 11	Feasibility analysis of the region's food system infrastructure (eg, processing and distribution).	MPO/COG - related to current RUCS activities with possibility for expansion
<b>Service Delivery</b>	●	X	Fin 3	Pooled purchasing of materials (e.g., fuel)	COG - new potential service
	●	X	Fin 4	Pooled purchasing of equipment (e.g., vehicles)	COG - new potential service
			Budget 2	Grant writing – Develop cross-jurisdictional teams to write sub-regional or regional grant applications, lowering the cost to each individual jurisdiction while increasing the chance of success through cooperative submissions	COG - new potential service
			Budget 1	Grant application coordination – promote regional or sub-regional application coordination	MPO/COG - related to current SACOG grant coordination activities with possibility for expansion
		X	Fin 2	Pooled purchasing of services (e.g., various consulting services)	COG - new potential service
		X	Fin 5	Pooled insurance/risk management	COG - new potential service

Source: SACOG, October 2012. Based on responses by managers and SACOG Board members to Shared Services survey, administered in September 2012. There were 25 total respondents representing 22 jurisdictions who provided substantive input.

<sup>1</sup> Survey responses - Percent of responses that were either "High" or "Very High" interest in services: Green = 62% or higher; Yellow = 55% to 61%; Blank = less than 55%. This does not include "medium" interest responses.

<sup>2</sup> X denotes those services that have very little sharing of this service now, and has a high level of survey respondents indicating interest in sharing. The figures are found in Table 2, on the far-right hand column. The general service categories that had a 43% differential or higher are noted with an "X". The 43% figure was chosen because there was a clear separation between those services above this figure and the rest of the field.

<sup>3</sup> This survey was intended to seek opportunities for shared services at a region-wide or sub-regional level, regardless of whether SACOG is involved in the service. However, for this table, information is provided on the potential for SACOG to play some role in deploying a shared service. "MPO" = SACOG's participation falls within statutory MPO function; "COG" = SACOG's participation falls within current or potential COG functions; "MPO/COG" = SACOG's participation might be related to both MPO and COG functions.

## Shared Services & New Initiatives Task Force 2012 Summary of Activity

### January 2012

SACOG Board Chair Peter Hill establishes Shared Services & New Initiatives Task Force with charge of discussing items to find cost savings or service improvements and appoints Directors Knight and Hodges, as Chair and Vice Chair.

### Spring (March-April)

Task Force and SACOG share best practices and discuss Shared Services & New Initiatives Work Plan

### Summer (June – Aug)

SACOG staff researches governance structures and shared service delivery options, including shared services activities in other councils of governments

SACOG staff meets with member jurisdictions represented on Task Force for listening sessions

### Fall (Sept-Oct)

SACOG staff surveys regional managers (city managers and county executives) about their current shared services activities and potential interests

Task Force reviews shared service survey responses; asks staff to organize ideas and identify possible early-action shared services.

SACOG staff forms Working Group of regional managers to review survey results, identify areas of interest, and consider process for gathering more information from jurisdictions.

SACOG staff develops worksheet reflecting specific services of regional interest ranked high or very high by survey participants, regionally and subregionally. Staff also identifies current shared services areas of high value/low activity.

Task Force discusses worksheet analysis and working group input. SACOG staff shares survey results and Task Force input with regional managers. Regional managers indicate interest in new service delivery options for cost savings.

### November

#### Task Force considers:

- Shared Services connections to Strategic Plan and OWP
- Existing Board criteria questions for new initiatives

- Process for exploring and implementing shared services
- Examples of shared services concepts for technical assistance, contracting/purchasing efficiency, and planning/policy support

Included in this attachment is a discussion of the criteria that has guided the establishment of new initiatives. What follows is how shared services initiatives fit within the context of the SACOG Strategic Plan and Overall Work Program (OWP).

### Criteria for Establishing New Initiatives

At an October meeting of the Shared Services Task Force, staff committed to providing a summary of the policies that have guided SACOG's participation in new initiatives and how shared services fit within SACOG's existing strategic plan. Criteria to consider the launch of a new initiative or activity were established by the Board in 2006/07. The 11 areas, which are listed below, provide a foundation for measuring new initiatives and key questions to address for successful implementation.

These criteria were first applied to form the Task Force on Flood Protection established in 2006. SACOG's role and the activities undertaken by this two-year effort were guided by the criteria.

The adopted criteria for new initiatives are:

1. Does the issue significantly relate to SACOG's primary responsibilities, such as: growth forecasts, projecting future land use patterns for the MTP, writing and implementing the MTP/MTIP/STIP, air quality findings, regional housing plan?
2. Are there economies of scale from conducting the function regionally?
3. Yes, Is their knowledge or value that is uniquely attainable through conducting the function at a regional scale, and is there anyone else better suited to provide the regional connections (i.e., is there a vacuum)?
4. What function(s) would SACOG provide (circle as many as appropriate)?
  - Develop data
  - Conduct analysis
  - Convene stakeholders for purpose of increasing their knowledge
  - Convene stakeholders for purpose of reaching agreement about taking some kind of action
  - Be a source of funding
  - Directly provide a service
5. What would be the role of SACOG's members? Would this add value for them? Save them money? Duplicate anything they currently are doing?
6. What would be the role of other key public and non-governmental stakeholders? Would this add value for them? Would it duplicate anything they currently are doing?
7. Would this be something SACOG would do once, a few times, or would it become an on-going part of SACOG's work program?
8. How would the function be funded? Dedicated funding sources? New or old funding? Short-term or permanent?
9. Where the expertise would be attained? Existing SACOG staff? New SACOG staff? Staff from members of other public or non-governmental stakeholders? Consultants?
10. Would performing the function require SACOG to reduce performance in other areas of its work program? If so, which areas? How much? For how long? Would the consequence be major or minor?
11. What are the chances for success?

## Shared Services in the Context of SACOG Strategic Plan and Overall Work Program

SACOG launched a strategic planning effort in 2009 to guide decision making and priority setting. Three goals with supportive strategies and performance indicators were established through a collaborative process engaging the Board and staff, and culminating in the strategic plan the Board adopted in 2010.

In addition to assisting the Board in organizing and establishing its priorities, the Strategic Plan helps the agency modernize and improve the Overall Work Program (OWP) development process. It does this by better linking the agency's annual budget and staff allocation to activities determined to offer the highest strategic value.

The Strategic Plan and OWP offer a framework that can guide SACOG's work as a partner with its member agencies to meet the demands of providing high quality services in a time of scarce resources. In order to illustrate this point, illustrative concept proposals are briefly described below by the performance indicator they most closely support. Note that these are just examples of the various shared service concepts surveyed that align well with SACOG's Strategic Plan and OWP priorities.

**Strategic Plan Goal 1: Sustain the agency's emphasis on information-based decision making by providing state-of-the-art data and tools to members, partners, stakeholders and residents to help them shape the futures of their communities and the region.**

### Strategies:

- Increase opportunities for member jurisdictions to utilize regional data, models and analysis to analyze impacts of their decisions on transportation, land use, air quality and other policy areas that affect quality of life.
- Increase agency capacity to provide scientific information and analysis of transportation, land use, air quality, and other matters of regional importance.

### **OWP Context:**

*In recent years, Goal 1 work activities focused on regional travel model enhancements and ongoing technical analysis to support the completion of the region's first Metropolitan Transportation Plan (MTP) / Sustainable Communities Strategy (SCS) and associated environmental impact report (EIR). In the current OWP, the focus shifts to sharing with member agencies the new tools and data developed that can inform and support local decision making. One of the means to achieve this outcome will be an update of SACOG's website to more easily share new maps and data from the MTP/SCS development process. In addition to increased technical support for member agencies, further refinements of existing tools are planned and new ones will be developed that integrate the agency's core expertise in transportation and land use planning with new topical areas, including land use economics and public health. Additional priority Goal 1 activities in the current OWP include increased education, engagement and policy analysis in support of SACOG's Strategic Plan. Other Goal 1 activities that may eventually lead to shared service opportunities include the deployment of a universal transit fare card (Connect Card) and new 511 traveler information tools.*

### Goal 1 Performance Indicators:

- A. Members and planning partners routinely use a combination of appropriate planning tools (e.g., I-PLACE<sup>3</sup>S and SACSIM) to conduct technical analysis of general plan updates, corridor plans, transportation circulation plans, and neighborhood and community plans, and use of such planning tools by stakeholders and residents to evaluate proposed development projects.

### ***Shared Service Concept Proposal: Travel Demand Forecasting (TDF) & Analysis Services***

*Direct SACOG involvement in TDF services would provide a higher level of consistency in data and assumptions across agencies than currently exists. For most projects and studies, SACOG's TDF model is more advanced and has more capabilities than the simpler models used by most agencies.*

- B. Interactive, information-based citizen engagement practices are commonly used by members in support of general plan updates, development of neighborhood and community plans, and evaluation of the impacts of significant proposed development projects. The Agency has an effective and active process for sharing information about SACOG activities with staff in service to local government

***Shared Service Concept Proposal: IT & Web Support***

*Greater access to information for local agency staff and residents would improve public information and public engagement coordination in the region. For member agencies, increased web access to agency-specific demographic information would offer near-term support to prepare successful grant applications. Longer-term, improved data sharing offers benefits to land use monitoring, forecasting, housing elements, modeling and other planning activities.*

- C. Appointment to the SACOG Board is viewed as an attractive opportunity for local elected officials and SACOG's Board members are actively engaged in pursuing the mission of the agency and the agency's local, state and national recognition for leadership in the implementation of information rich, consensus-driven regional efforts to improve the quality of life in the region continues to be enhanced. SACOG actively engages in providing information to all elected leaders about the role it plays in regional affairs and how this role contributes to an improved quality of life.

***Shared Service Concept Proposal: Support for Economic Development Initiatives***

*As the region slowly recovers from a deep recession, realizing economic development opportunities is a key to restoring the region's high quality of life. SACOG's role in regional-scale physical planning can support the implementation of regional to local economic development strategies with analytical tools and research. Additionally, the SACOG Board has the potential to be a forum that facilitates the coordination of small, medium and large jurisdictions in economic development support activities. Potential benefits include the regional sharing of assets and needs to leverage unique economic development opportunities.*

**Strategic Plan Goal 2: Maximize strategic influence for the region through developing and implementing integrated regional transportation plans that produce unique and significant quality of life benefits for residents of the region.**

**Strategies:**

- Consolidate, expand and maximize strategic advantage from the agency's state and national leadership role and access to the best tools and methods for preparing an outstanding MTP.
- Maximize the benefits of comprehensive planning and project implementation in the Sacramento region.

***OWP Context:***

*Realizing MTP/SCS implementation opportunities is a primary Goal 2 focus in the current OWP. The MTP/SCS strengthens transportation-land use-air quality connections and furthers the integration of the Regional Blueprint Strategy, Rural-Urban Connections Strategy (RUCS), and Regional Housing Needs Assessment (RHNA) with ongoing core activities, such as transportation programming and air quality planning. Helping member agencies realize CEQA streamlining opportunities made possible by the MTP/SCS is a priority effort in the new OWP, as is the launch of new RUCS initiatives that include a feasibility study on the potential for specialty crops to be the foundation of a local food system that benefits the rural economy. Other planned work activities to support Goal 2 include assistance to local agencies amending their general plan housing elements to incorporate new RHNA numbers, maintaining strong transportation project delivery, and developing implementation strategies for early year MTP/SCS investments. Short-range transit plans and a deeper analysis of new mobility options, including plug-in electric vehicles, are examples of new transportation-related MTP/SCS implementation efforts that may eventually lead to new shared service opportunities.*



Goal 2 Performance Indicators:

- A. SACOG's MTP will remain a leader in the state in improving per capita VMT, congestion, air emissions and other performance measures that advance the quality of life.

***Shared Service Concept Proposal: General Planning Services***

*Enhancing quality of life performance outcomes can be supported by a greater coordination of transportation/land use/air quality planning efforts across the region. For example, greater alignment of growth forecasts and investment priorities in local general plans and the regional MTP/SCS helps achieve good performance measures that track quality of life. Also, clear and consistent documentation between general plan and MTP/SCS environmental documents may result in greater CEQA streamlining opportunities through SB375.*

- B. SACOG will leverage its high performing MTP/SCS to secure additional funding and policy support from federal, state and local sources to build key projects sooner than would otherwise be possible.

***Shared Service Concept Proposal: Regional Advocacy***

*SACOG has helped manage regional advocacy coalitions, and also has experience participating in statewide and national coalitions with varying degrees of effectiveness. Due to the recession over the past few years, several member jurisdictions have had to let go of, or dramatically reduce, the scope of their advocacy contracts and are relying solely on internal staff for host of advocacy functions. There may be natural partnership opportunities on issues relevant to economic development, infrastructure and natural resources to support coalition effort on issues of regional and local significance.*

***Shared Service Concept Proposal: Grant Writing***

*Competitive funding opportunities require sufficient resources to research opportunities, develop an effective application strategy, and produce successful applications. Within the six-county region, there are varying levels of staff capacity for competing for these funding opportunities. There is an opportunity for SACOG to provide support for both individual local grants and partnership applications.*

**Strategic Plan Goal 3: Serve as a source of high quality information, convener, and/or advocate on a range of regional issues when the agency's involvement would provide unique, added value to promoting a sustainable future for the region.**

**Strategies:**

- Continue to expand SACOG's data and modeling capability to include topics that influence transportation behavior and planning (e.g., energy, climate change, land use economics and infrastructure).
- Assist regional partners with the evaluation of functional service delivery opportunities and act upon ones that will most assist the agencies.
- Analyze options for increasing SACOG's financial analysis and capacity so that it is able to serve the region if and when new service needs are identified.

**OWP Context:**

*Work activities in the current OWP focus on facilitating a dialogue between member jurisdictions on opportunities for shared services. Outcomes from these planned efforts may lead to new SACOG initiatives later that reflect the agency's unique role as a forum for issues of regional concern.*

Goal 3 Performance Indicators:

1. Deliver cost savings to local governments by building the capacity of the agency in areas of highest need to member jurisdictions, and/or leveraging new revenues in collaboration with local governments.

**Shared Service Concept Proposal: Technical Capacity Services**

*In a Fall 2012 survey of SACOG members, technically-oriented shared services (Travel Demand Forecasting & Analysis Services, IT/Web Support, Support for Economic Development, General Plan Technical Support) demonstrated medium to high degrees of support. The shared service concepts in these disciplines may deliver near-term cost savings to local governments and a long-term benefit to SACOG through increasing staff technical capacity. The increased SACOG capacity provides an opportunity for additional collaborations with local governments and new leveraging opportunities that may result in even greater cost savings and efficiencies across the region.*

**Shared Service Concept Proposal: Pooled Purchasing & Pooled Risk**

*In a Fall 2012 survey of SACOG members, a medium to high degree of interest was expressed by small or medium-sized jurisdictions. For these jurisdictions, a regional shared service may offer access to goods or services that would otherwise be cost-prohibitive. Several types of pooled purchasing and pooled risk could be coordinated at the regional level and may result in cost savings to local governments. These opportunities include pooled materials purchasing, pooled equipment purchasing, pooled service purchasing, and insurance/risk management pooling.*

**Shared Service Concept Proposal: Compensation Survey**

*In a Fall 2012 survey of SACOG members, many agencies ranked this as a medium or high interest area, and also an area where there is little current activity. There was high interest among SACOG Directors and city managers/county executives. Potential benefits include cost savings for HR support, improved and standardized compensation surveys, and access to up-to-date compensation information*

2. SACOG's member services program will increase coordination activities relating to assistance with policy development, joint project delivery, grant development, and requests for technical assistance as measured by increase in requests from member jurisdictions for assistance and resulting grant acquisition or more integrated policy making.

**Shared Services Concept Proposal: Task Force, Board Retreat & Future Activities**

*Board guidance through the Task Force & Board Retreat is structured to provide critical input on the various shared service concept proposals and associated policy principles. These forums will also vet feasible governance models and identify future activities to move forward a regional shared services program.*

**Draft Shared Services Work Plan Element:**

- *Research, analyze and prioritize new regional partnership opportunities and services*
- *Development of communication strategies and tools for sharing information and identifying partnering opportunities. Potential strategies & tools:*
  - *Web-based center for matching services & needs between local agencies*
  - *annual conference (highlight best practices and shared services focus initially)*
  - *direct SACOG to work with advisory role from regional managers and sub group activities*
  - *convene policy and department staff discussion groups as needed*
  - *expand best practice highlights/sharing opportunities*
- *Review of interim successes and lessons learned for future work plans*