

A Starting Point

A Strategy for City-County Service Consolidation

*City of Pittsburgh
Allegheny County*

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We also thank the many **officials and experts**, who took time to speak candidly with us in

connection with this report (a full list is available in the Appendix).

The members of this project's **Advisory Board**, who graciously shared their time and knowledge, to help us hone our research.

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Our advisor, **Bob Webb** for his patience and wise counsel.

PREFACE

Prepared by a group of six students at Carnegie Mellon's H. John Heinz III School of Public Policy and Management, ***A Starting Point*** examines the consolidation of services opportunities that exist among the City of Pittsburgh and Allegheny County.

Currently, a window of opportunity exists for consolidating services and functions of the City and County. The region has a pronounced need for cooperation, cost savings, and increased efficiency and effectiveness. Over the course of eleven weeks, the team gathered all available reports, interviewed director-level decision makers, and conferred with local experts. This report would not have been possible without the support of both City and County administrations and Councils.

In early 2004, members of the team began discussing with local officials and leaders the possibility of a project that could add value to the current conversation about consolidation of services. Consistently, leaders expressed a need for an implementation strategy or approach for moving consolidation of services forward. They indicated that much research had been conducted on what could be done.

What had not taken place was a uniform analysis of the consolidation opportunities, and an

identification of a direction for proceeding. Based on these discussions, student research commenced in late May 2004.

The purpose of this project is to provide a tool to high-level policy and decision makers to assist them in their efforts towards the consolidation of services. There were four key objectives of the project.

First, to provide structure to the consolidation of services discussion that would focus on the critical decision issues. Second, to analyze the complexity of the consolidation opportunities in order to inform a strategy. Thirdly, to provide specific steps and recommendations for how to achieve consolidation. Finally, to present important issues for consolidation opportunities as a whole.

The following report presents the reader with high-level findings and recommendations that are important to all consolidations. Additionally, the report focuses on six (6) City and County departments that have been identified by the City-County Summit Report¹ as ripe opportunities for consolidation. They are:

- Information Technology
- Tax Collection
- Public Safety
- Public Works
- Parks and Recreation
- Economic Development

¹ "City-County Summit Working Group: Purchasing Working Group Report," March 26, 2004.

HIGH LEVEL FINDINGS AND RECOMMENDATIONS

Several key themes emerged as the team conducted its research. The findings and recommendations that follow are essential to understanding the consolidation of services overall.

Implementation of service consolidations can begin immediately.

Many of the key implementation steps listed in this report can be initiated immediately. In the cases where agreement is needed on common mission and policy, cooperative discussions can be initiated.

Recommendation – Begin implementation of Information Technology (IT) consolidation so that other consolidation efforts may benefit from a consolidated IT system.

Recommendation – Address the impact of a consolidation of Public Works on the consolidation of Parks, since the two services are currently inter-twined.

A strict focus on short-term cost savings will limit both short and long –term benefits of consolidation.

Although government management and service departments are accustomed to immediate cost savings as a driving strategy, such a focus may

overlook opportunities that a larger restructuring represents.

Recommendation – Consider other important benefits that more efficient systems provide, including containment and reduction of current costs, long-term savings, and potential for enhancement of service provision. A focus on these benefits may lead to additional short-term solutions, such as external sources of funding, broader coalitions (i.e. with other governmental entities), and greater innovation in implementation.

Utilizing and adapting existing models for consolidation can greatly advance implementation.

Over the past several decades, regions across the country have consolidated services, and have resolved similar complexities to those faced in the consolidations examined in this report. Most of the directors and staff interviewed had some awareness and understanding of relevant models.

Recommendation – Identify relevant consolidation models where the most complex issues involved in the consolidation, such as defining shared missions and policies, union contracts, and costs, were resolved. Use the models as a tool in the negotiation of complex issues.

The City and County often have core mission differences in providing services.

Whether it is a general difference in providing service, or specific differences such as answering different types of homicide calls, the divergence in mission and service provision are often the perceived roadblocks to consolidation.

Recommendation – Create inter-agency consolidation task forces. Task forces and advisory boards have been instrumental in planning for some consolidations. Two examples are: the Criminal Justice Policy Advisory Board, which gained consensus for and is overseeing the restructuring and expansion of the Criminal Identification system; and the Regional Cooperation Sub-Committee on Information Technology, which put together a comprehensive outline for consolidation. An important aspect of their ability to aggregate different missions and services is simply bringing both parties to the table, and establishing a “spirit of cooperation.”

Workforce and Organizational issues are consistently among the most complex components of consolidation.

Concerns about agreeing upon new organizational structures and union contracts were regularly cited as the most complex issues in the consolidation.

Recommendation – Assign a special team of experts in organizational development and union issues to address all of the various service consolidations, and work as a consulting body under joint recognition of the City and County to assist all consolidation efforts. The consistency of these issues presents the opportunity to address them holistically, and to allow one consolidation effort to benefit from another.

INDIVIDUAL REPORTS

INFORMATION TECHNOLOGY

INTRODUCTION AND CONTEXT

Both Allegheny County and the City of Pittsburgh have conducted research and analysis on the issue of Information Technology (IT) services integration. While both organizations over time have streamlined operations and become more productive with fewer resources, the consolidation between the two entities has seen only limited success.

Researching City and County IT systems presented common, recurring themes. Organizational and cultural differences have helped to drive apart rather than unite County and City IT services. These differences can be traced directly to the differing core missions of both organizations. As such, consolidation opportunities have been necessitated more by cost considerations rather than bringing about better, more efficient government.

Contributing to and perhaps exacerbating these obstacles to consolidation were several factors. First, significant budget cutbacks that have both organizations focused on maintaining rather than expanding or streamlining service delivery. Secondly, due to Commonwealth and regulatory requirements, Allegheny County works under a disparate command and control structure from the City. Finally, legal obligations

negotiated in the past in the absence of a “big picture” consolidation mindset add to the complexity and time necessary for consolidation.

CONSOLIDATION ANALYSIS

Framework

The method of analysis used in this project is based on a framework composed of the following seven (7) components:

- Legal
- Statutory/Regulatory
- Financial
- Organizational
- Workforce
- Technology
- Model/Agreement

These components were identified through benchmark research of consolidation initiatives in the recent past in Allegheny County, and in other counties across the country. They are categories of issues that are most relevant to the implementation of a service consolidation.

As the basis for the method of analysis, the framework provides the following:

- structure for the organization of existing data on consolidation opportunities
- structure for focused research on these opportunities;
- and a basis for uniform analysis and strategy.

The seven components of the framework are used consistently in all aspects of each consolidation

analysis in this report, providing a uniform method to discuss the various unique consolidation opportunities, compare them, and synthesize information about all of them.

Methodology

Within each framework component, steps need to be taken in order to consolidate a given service. Researchers assessed the level of complexity and time commitment that would be required to complete these steps. This assessment was done systematically and took into account uncertainties likely in the real world. (See appendix for more detail.)

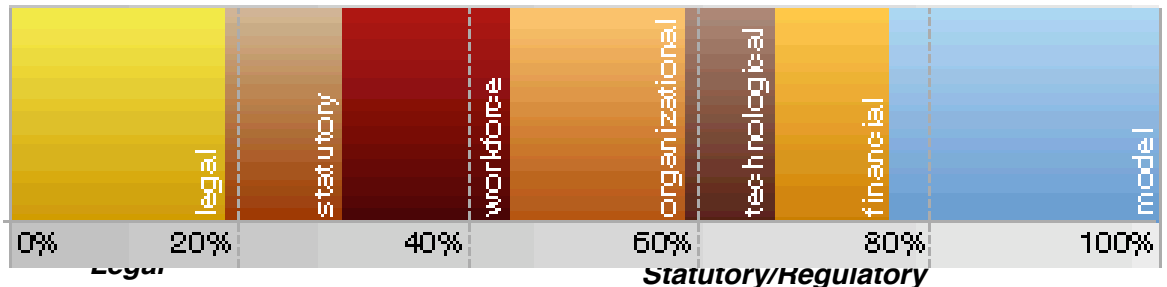
Results for the analysis of IT are in the chart below. *(Components with larger bars will be more complex and time consuming to complete than components with smaller bars.)*

The sections below give greater detail about the insights and vital data we gleaned through the course of research on this service area:

Many current contracts with vendors for services and equipment have yet to expire or expire at inopportune times thus preventing combined City-County purchase agreements. Moreover, contractors may not offer significant savings to the City and County when they purchase goods and services together.

Research and analysis also concluded that contracts and agreements that cannot be broken or would not be cost-effective to break were a leading barrier to moving forward on several key consolidation opportunities, such as payroll processing consolidation. Such a decision would create performance efficiencies, but not necessarily cost savings.

IT Consolidation Analysis



Differences in software performance requirements between the City and the County have served to make merging systems and operations difficult. Until these issues are fixed, the efficiencies that combined internet management would bring is on hold.

Moreover, the state funds many municipal software purchases directly and state requirements may not and often do not match with streamlining operations overall on the county level. This is certainly true for the County which must manage more state mandates than the City.

Workforce

Budget cutbacks and hiring freezes have not only slowed IT consolidation efforts, but placed significant pressure on both IT organizations to maintain existing IT services with decreased resources. This places stress on consolidation in two ways: (1) new staff with advanced technical skills can't be hired (2) the focus of consolidation efforts become focused on cost-cutting, i.e. decreasing staff rather than streamlining or improving citizen service. If consolidation is to be truly successful, both sides must develop more comprehensive human capital sharing agreements to bring in new talent and their creativity to aid not just in consolidation, but also to add vitality and improve both organizations overall.

Organizational

Analysis concluded that the service missions of the City and County governments, while sharing many similarities, are quite varied and different, with the City focused on running the operations of Pittsburgh and the County focused on social services and other services not involved in day-to-day operations. This variation does not allow for many customer-oriented consolidations, but still both IT organizations share many functional similarities that can be consolidated over time if provided the resources and focus from policy leaders.

This consolidation will become more challenging should the City and County pursue ideas and proposals for outright IT consolidation between the two entities.

Financial

Additional funding and resources could greatly bolster the identification and implementation of cross-beneficial IT consolidations (as identified in the tax collection section of this report).

As IT spending is a centralized function, it is easy to cut. Without upfront investment and policy backing, the benefits of IT consolidation in terms of improved service delivery and cost savings in the long run cannot be attained. For example, IT spending cuts that date back to the early 1990's laid the foundation for a fractured IT service infrastructure. In the long-run, those moves have cost the County more money and

resources while making upgrades and efficiency gains increasingly difficult; with over 22 data centers, instead of one or a few consolidated servers and backup facilities.

report have been achieved, longer-term targets have not been pursued or have been delayed.

Technology

Both City and County IT managers agree that in terms of technical feasibility, there are no technical issues that cannot be solved with current technology.

Model/Agreement

The City-County Summit Report and Regional Cooperation Committee Report², both have provided detailed insight into existing opportunities with regards to IT services consolidation. The Summit Report's Information Technology Working Group section, focused very much on problems at a fundamental level that the City and County can remedy in order to facilitate consolidation.

The Regional Cooperation Committee (RCC) Report detailed specific actions which could be taken over the short and long term with regards to IT service consolidation between the City and County.

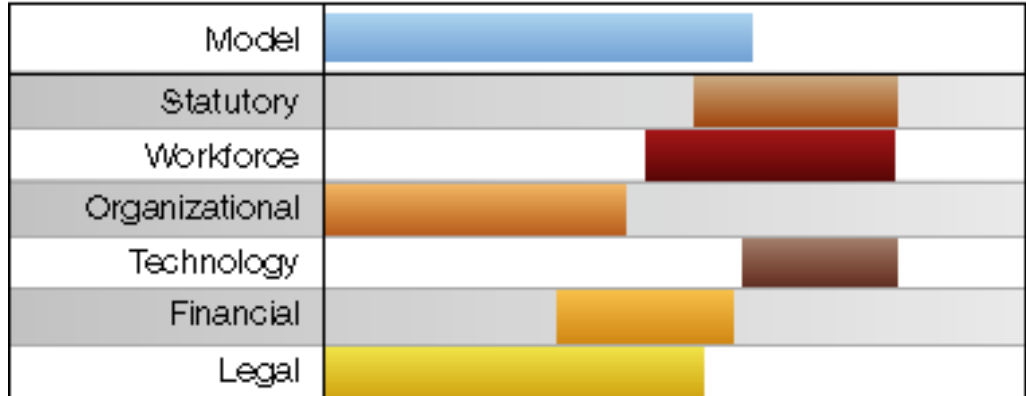
The RCC Report outlined a timeframe and set overarching goals for consolidation of IT services and serves as a model for continued consolidation between the City and County. While many of the short-term goals in the

² "Regional Cooperation Committee Report to City Council," October 29, 2003.

IMPLEMENTATION STRATEGY

Consolidation Progression

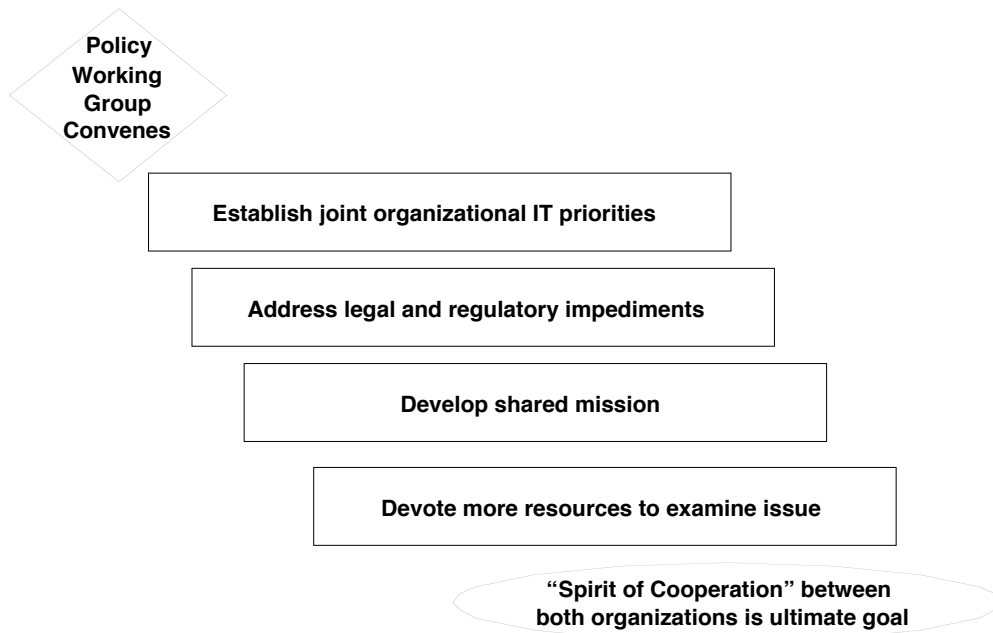
IT Consolidation Progression



The team developed a two-pronged implementation strategy. The first prong of the strategy is a consolidation progression. It is a visual representation of how the framework components interact with each other in terms of complexity, dependency on other components, and the need for more research. The consolidation progression (below) demonstrates how to proceed with the implementation. Complexity is represented by the length of the component bar. Dependency and the need for more research are represented by the sequence of bar placement.

Legal and organizational concerns are a highlighted priority since research shows these to be the most challenging obstacles to consolidate.

KEY STEPS



The second prong of the strategy is identification of key steps important to the consolidation.

Our analysis also led to the development of key steps that prioritize and target key opportunities on the road to consolidation. In order to meet those objectives, steps must be taken to lay the groundwork to meet those goals. The graphic below succinctly categorizes the steps we believe should be taken in order for both IT organizations to better understand and facilitate the goal of greater cooperation and service integration.

Establish joint organization IT priorities

Resolve common differences regarding service and responsibility prioritization, i.e. security and data sharing. Establish specific timetable moving toward common platforms.

Address legal and regulatory impediments

State regulations on platform requirements must be addressed.

Develop shared mission

Cultural and core mission differences must be resolved.

Devote more resources to examine IT consolidation opportunities

More research needs to take place to determine the full impact of consolidated IT services.

RECOMMENDATIONS

Focus on long-term gains rather than immediate budget savings

- Policy and political leaders should highlight the importance of and leverage IT can have in other consolidation opportunities.
- Budget cuts in the past have contributed to the current IT organization at the County level which ultimately have resulted in a more costly model.
- Political assistance with contracts, regulatory issues and service priorities to help get best price/lowest cost will help advance process

Acknowledge the need for a common vision

- County and City both have different missions for IT, until common “big picture” goals are established, greater opportunities for change will be missed

Binding legal contract agreements must be considered.

- Much like in the area of purchasing and 911, overarching strategic plans for both organizations need to be contractually agreed to with actual timelines to encourage and facilitate major consolidation.

TAX COLLECTION

INTRODUCTION AND CONTEXT

Consolidation of the City of Pittsburgh and Allegheny County tax collection services would result in improved efficiencies and citizen service. Benchmark research, independent reports, and City and County officials indicate that consolidation of tax services would reduce redundancy and taxpayer confusion. Simply put, residents of the City receive two bills from two separate offices for their local government taxes when they could receive one. This report identifies the steps that must be taken to merge real estate tax collection services, and illuminates some of the obstacles that are preventing these steps from being taken.

The City and County have different emphases in the tax collection process. The County focuses on current billing and out-sources delinquent collection. The City places a strong emphasis on delinquent tax collection (because of the high percentage of residents that do not pay their City real estate tax on time)³. A significant aspect of the context for tax collection is that the City collects City of Pittsburgh School Board taxes as well. The School Board has indicated a willingness to move to a new collecting entity, if

³ One rough estimate is that half of City residents pay real estate taxes on time. This may be a reflection of the economic status of some City residents, and it may also be a result of the confusion of multiple real estate tax bills.

the costs presented to them are acceptable⁴.

Models exist for successful real estate (property) tax collection consolidation of services in Charlotte, Minneapolis and Lancaster County, PA. Minnesota recognized 30 years ago the benefits of consolidation of services. In 1976, the state legislature declared that “the local governmental units within the metropolitan area are interdependent... [and that the] problems of urbanization and development transcend local governmental boundaries.”⁵ As a result Minneapolis took advantage of economies of scale by authorizing the County to collect City taxes. In Pennsylvania, the Lancaster County Tax Collection Authority has shown that it can collect both current and delinquent taxes at a significantly cheaper rate than its individual member municipalities could. So the possibility for savings and efficiencies exists.

The goal of this report is not to justify the concept of consolidation of services. However, it is relevant to mention some of the justifications for this premise. Reports, policy analysts and local officials interviewed are almost unanimous that one tax collection entity is, in principle, inherently more efficient⁶. In addition to the

⁴ In 2004, the School Board paid \$4,700,000 to the City of Pittsburgh to collect all School Board taxes. (Source: City County Summit Report, March 2004)

⁵ Minnesota Legislature, 1976.

⁶ This point is made with the caveat that a single entity can be more efficient, but it

potential for reducing mailings (particularly on the delinquent side of collection), residents can also benefit by simplifying tax collection processes. Uniform delinquent collection processes and uniform services can also benefit citizens of Pittsburgh.

Data and discussion on merger of City and County tax collection services is currently limited to property tax collection only. Initial meetings of City and County officials determined that there are no efficiencies to be gained from merger of earned income tax collection services⁷. While it is true that the County does not collect this tax, merger of other tax collection services should not be taken off the table. If both governments understand the benefits of a merged real estate collection entity, it makes sense that a single entity should eventually collect all City and County taxes.⁸ However, because of the lack of data and discussion on merging other tax collection services, the focus of this report is real estate collection only. More research is required to determine the potential for a merger of taxes beyond real estate.

doesn't have to be. That is, efficiencies are possible with a single merged tax collection service than with two, but that single entity may be run more efficiently by one group than another.

⁷ "City-County Summit Working Groups, Tax Collection Working Group Report", Sub Committee Meeting Memo, March 1, 2004.

⁸ One expert suggested that the state may be able to handle local earned income tax for the city, as it already collects it at the state level. This requires more research.

CONSOLIDATION ANALYSIS

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Methodology

Within each framework component, steps need to be taken in order to consolidate a given service. Researchers assessed the level of complexity and time commitment required to complete these steps. This assessment was done systematically and took into account uncertainties likely in the real world. (See appendix for more detail.)

Results for the analysis of property tax collection are in the chart below. *(Components with larger bars will be more complex and time consuming to complete than components with smaller bars.)*

Property tax collection merger research filtered through our framework has found the most significant aspects of property tax collection consolidation to be Organizational and Statutory/Regulatory. That is, the most complex and time consuming efforts for the merger of real estate tax collection services are likely to be in Organizational and Statutory/Regulatory component areas.

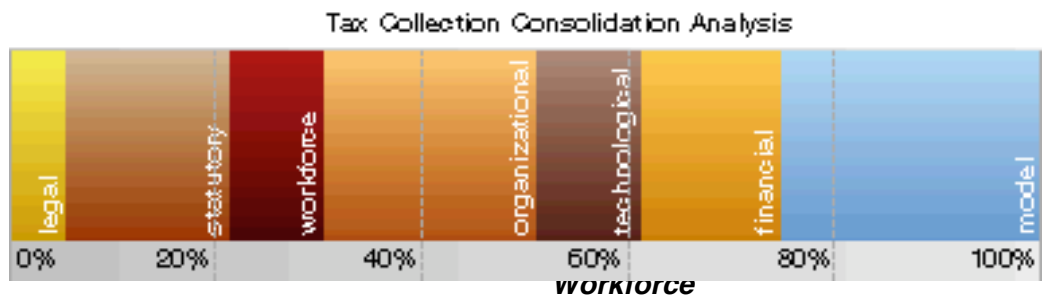
The sections below give greater detail about the insights and vital data we gleaned through the course of research on this service area:

Legal

Contracts with the City's billing vendor and with the School Board would have to be terminated if the County took over collection. These are important contracts, but not significant in terms of complexity, time and cost. By all accounts these contracts would be able to be cancelled with minimal difficulty if the County took over collection.

Statutory / Regulatory

The City-County Summit Report indicates that certain legislative initiatives are required in order for a merger of real estate collection to progress⁹. Interviews with experts suggest that intergovernmental agreements would be sufficient to achieve consolidation of services without authorizing legislation. That said, however, there is still a potential for high statutory complexity.



⁹ "City-County Summit Working Groups, Tax Collection Working Group," Summary points, March 31, 2004

A merger of only real estate tax collection is not likely to impact workforce significantly. Workforce challenges would likely be exhibited if and when tax collection consolidation involved additional taxes beyond real estate. A complete merger of offices would result in more significant workforce concerns. Unions would likely become more involved in the process beyond real estate.

Organizational

Analysis of tax collection concludes that several organizational changes would be required regardless of the direction of consolidation, making this a significant component. Steps like establishing acceptable billing dates, uniform payment structures, and communication procedures (see key steps) are not necessarily complex individually, but taken together they are likely to be involved.

Financial

Regarding property tax collection, there is not a significant financial challenge to consolidation. Information technology upgrades would be required regardless of the direction of consolidation. Costs have not been identified if County took over real estate tax collection. However an information technology upgrade cost of \$219,000 has been estimated if the City takes on County real estate tax collection. More research on costs is required.

Technology

The City would create an additional column in their information system to capture collection of County real estate. (Hardware, software & labor estimate is \$219,000). If the County took responsibility for property tax collection, a more significant capital investment may be required to update County systems to handle other City taxes. However, specific information about changes required at the County level needs to be researched.

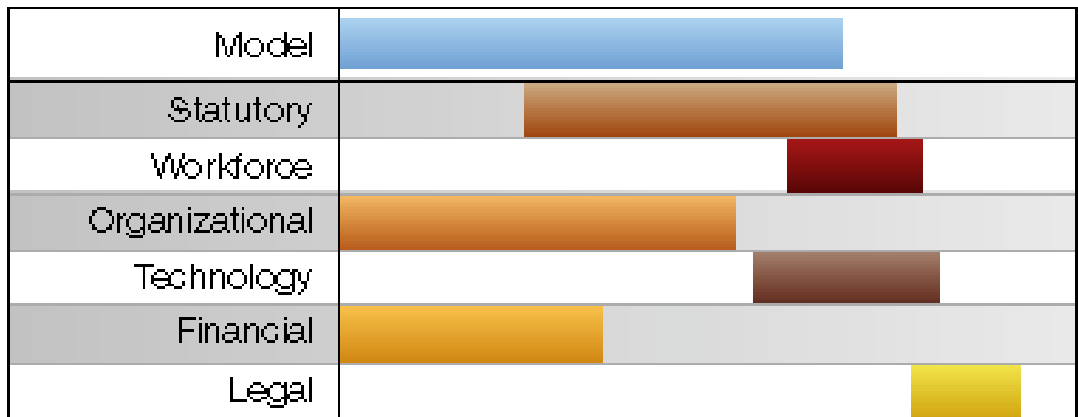
Model/Agreement

No consensus on direction of consolidation, and no discussion or consensus on a model to emulate.

IMPLEMENTATION STRATEGY

Consolidation Progression

Tax Collection Consolidation Progression



The team developed a two-pronged implementation strategy. The first prong of the strategy is a consolidation progression. It is a visual representation of how the framework components interact with each other in terms of complexity, dependency on other components, and the need for more research. The consolidation progression (below) demonstrates how to proceed with the implementation. Complexity is represented by the length of the component bar. Dependency and the need for more research are represented by the sequence of bar placement.

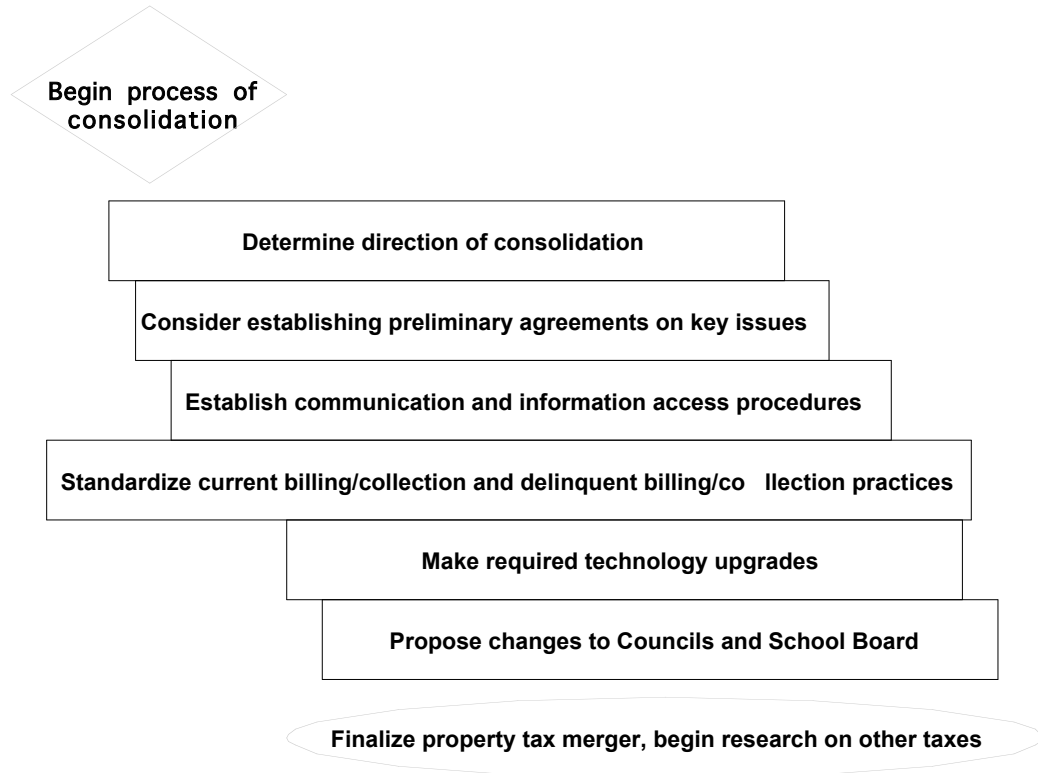
The progression of consolidation of real estate taxation takes into account the complexities previously discussed in order to give general strategy for consolidation. In this strategy progression, we see that the financial component should be handled first. Specifically, research regarding costs for County collection must be completed so that final determinations of direction can be made. This will make it possible for the City and Pittsburgh Public School Board to know exactly how much they will pay for a County provided service. Once that

research and determination is complete, other organizational practice details (such as billing dates and communication procedures) can be worked on, along with preparation for statutory approvals of the merger. Information technology upgrades can be made once procedures are determined. Next, workforce liaisons can be instituted, and lastly legal contracts with vendors can be severed.

The lack of a consensus on the direction of consolidation, and a failure to address long term consolidation issues are holding up a merger. It has been stated that consolidation of tax collection services cannot begin until a decision is made as to the direction it should go. This is very true. This report will later discuss why this decision has not been made and make suggestions in the recommendation section that follows.

No logistical considerations preclude the merger of real estate tax collection. While there are specific concerns to be addressed, they do not prohibit a merger of real estate tax collection. Consolidation of other offices (Economic Development and/or IT) could help facilitate consolidation of tax collection. However, real estate tax collection merger is not dependent on the merger of those entities.

KEY STEPS



Determine direction of consolidation

Our recommendation is to strongly consider the long term benefits that a County-wide collection entity would provide.

County should offer a price for real estate collection to the City and School Board. This will permit an evaluation of costs by both the City and the School Board. It is unclear if the County would be able to provide a cheaper service than the 0.0796% of collections outsourcing costs currently paid by the City (and for the City's collection of the school board).¹⁰

¹⁰ City of Pittsburgh Real Estate collection Cost Survey

This should not necessarily preclude merger of services, however it is necessary information.

Table the question of an independent tax authority. The intent of this report was not to evaluate the pros and cons of an independent authority; the intent was to highlight the steps necessary for service mergers. Some have suggested that establishing an independent tax authority is necessary to complete a merger of real estate tax collection.¹¹ Strictly speaking, this is not true. It is technically possible for a merger of tax collection services to occur without an authority. Further research

¹¹ Competitive Pittsburgh Report, 1996

would be required to evaluate the value of creating an additional authority.

Consider establishing a preliminary agreement on key issues

Before moving forward with the logistical and procedural changes necessary for a merger of real estate tax collection, the City and County should consider establishing a preliminary agreement to alleviate the major concerns of both entities. For example, some officials have expressed concern that collection rates may vary as a result of a merger. It would be beneficial for the parties to come to a preliminary agreement on a minimum collection rate, and describe contingencies if the collecting entity falls below that rate. So long as there is concern about losing money, dedicated public servants will seek to protect their government's revenue sources. This makes sense. A preliminary agreement would permit managers to set aside this major concern and flesh out smaller organizational details more readily.

Establish clear communication and information access procedures.

Written procedures describing when and how required information would be available to the partner entity should be established. Concerns have been raised about information access by departments of one entity toward the collecting entity. Again, these concerns are relevant and need to

be addressed. They are not, however, insurmountable. They just need to be described and outlined. Much of the real estate tax information is public, and in some instances web accessible.

Among the communication procedures that should be outlined (not a complete list) are:

- a) Access by separate authorities and agencies (i.e. Housing Authority, Urban Redevelopment Authority) to real estate accounts to approve associated state and local real estate status
- b) Reporting process to participating entities for budgeting and statistical analysis purposes

Standardize current billing/collection and delinquent billing/collection practices

There is not a consensus as to whether delinquent or current tax collection should be merged first. To the extent that they can be merged simultaneously into a single entity, greater efficiencies are likely.

Among the standards that need to be established (not a complete list):

- Define uniform billing date
- Billing standards (payment plans, hardship payment plans, special billing capabilities)
- Standardizing timing of declaring tax exempt status
- Pro-rata payment to participating entities (City, County and School Board)
- Define uniform date of delinquency

- Delinquent interest rates, penalties should be established
- Assessment appeal procedures should be determined

Make required technology upgrades

Technology changes and upgrades are likely to be able to occur simultaneously with other steps.

Propose changes to City and County Councils and the School Board

Finalize property tax collection merger and begin research on other tax areas.

With a merger of property tax collection services, research could begin on the potential for other tax collection mergers.

RECOMMENDATIONS

Focus on long term efficiencies and gains.

A reassessment of the goal of consolidation of services should help resolve direction of tax collection consolidation. Despite the challenges associated with County collection of City real estate taxes, our expert interviews, benchmark research, and recognition of the population shifts in the region, County collection of City taxes makes sense long term. County collection makes sense despite the fact it probably means a more difficult and time intensive merger with uncertain short term benefits.

The City has successfully acted as a model of consolidation of tax collection in its collection of School Board taxes. Notice the direction of this model was from a smaller municipality to the larger government. This reasoning still holds for merger of real estate tax collection into the County.

Decision makers and managers should be aware, however, that merger into the County is likely to be a more complex endeavor than City collection of County real estate taxes in the City. While City collection of County real estate taxes would likely be a much simpler merger in the short term, it would be less likely, although still possible, that the region would benefit long term. It is unclear whether other municipalities in the County would be willing to have City collect their taxes, precluding the largest economies of scale and efficiencies possible.

Acknowledge the strengths of both entities, and address their concerns.

While a direction toward the County makes sense, legitimate questions and concerns have been raised about cost, collection rates, and communication. These questions do not preclude a merger, but they should and can be addressed.

Consider a preliminary agreement.

The agreement should address major collection concerns, and then begin to discuss details of the merger of services.

PUBLIC SAFETY

INTRODUCTION AND CONTEXT

Because the complete consolidation of public safety services between the City and County has been acknowledged as a very complex undertaking, only a limited number of public safety functions have been addressed in the recent reports on consolidation, such as the Regional Cooperation Committee report, the City-County Summit on Consolidation report, and the Act 47 Recovery Plan. This section will focus on those consolidations addressed in previous studies, which in this case are seven (7) specific public safety functions. The seven opportunities are:

- Arson Squad
- Bomb Squad
- Criminal Identification (ID)*
- Homicide
- Training Academies
- SWAT Team
- Warrant Office

While the complexity of the overall consolidation of Public Safety services anchors the discourse on these specific functional opportunities for consolidation, progress and even completion of other functions within Public Safety, such as the merging of 911 centers, demand a realistic perspective on the consolidation of Public Safety services. The model that best addresses both the daunting complexity of a City-County unified command and the past successes, is a progressive

model that addresses the complexity of important consolidation issues on a small scale first. Such a progressive strategy will unify the respective analyses, of the list of consolidations above, throughout this section.

* Criminal ID is included in this report, although it has been functioning as a joint City-County function for over 20 years. The Allegheny County Criminal Justice Advisory Board, a joint commission of all local Public Safety agencies, has reached consensus on a restructuring of the consolidated entity, and has secured a consultant with state grant funding to devise the strategic plan for a new Criminal ID system, which will be operated by the County. Because, effectively, a new consolidated entity is being created, Criminal ID is included in this report.

The structure of the following section on Public Safety, takes on a slightly different one in order to accommodate the differences in this particular analysis.

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- structure for the organization of existing data on consolidation opportunities
- structure for focused research on these opportunities;
- and a basis for uniform analysis and strategy.

The seven components of the framework are used consistently in all aspects of each consolidation analysis in this report, providing a uniform method to discuss the various unique consolidation opportunities, compare them, and

synthesize information about all of them.

The method of analysis was primarily developed, however, for department-scale consolidations of services, such as are found in the other sections of this report (Public Works, Information Technology, etc.). Because this section on Public Safety addresses many smaller consolidations, a complete analysis was performed for only the combination of Arson, Bomb and SWAT. The most important components of consolidation for each are similar. The other consolidation opportunities are analyzed using the framework components (technology, organizational, legal, etc.), but were not scored and graphed using the entire method of analysis.

Even with a simple analysis of the other consolidation opportunities, however, many common issues for all public safety consolidations are evident. Therefore, it is possible to make general recommendations for all Public Safety consolidations, and to focus on and devise a strategy to approach the apparent idiosyncrasies of all of the consolidation opportunities.

Although all of the issues listed under each component in the proceeding section are important considerations for implementation of the various consolidation opportunities, two components in particular warrant focus and commitment. These components are Workforce and Organizational. The emphasis on the findings in these two components will be

common in the implementation strategy for Public Safety consolidation as well.

Arson, Bomb and SWAT – Key Findings

The following is an overview of the findings for each component of the framework with respect to Arson, Bomb and SWAT consolidations:

Legal

Liability – each agency, which currently manages its liability, would need assurance of liability protection, given that the other agency would be providing service to constituents in their (former) jurisdiction. No contractual or other legal commitments exist.

Statutory/Regulatory

City and County Council approval may be required in certain areas. State Statutes are not specific to constrain consolidation. The position for any regulatory argument would be that an attempt is being made to enhance service through consolidation.

Workforce

Regarding union contracts, some officers could be moved from one agency (and one union) to another, pensions are an element of the issue. Task forces must be established through intergovernmental agreement, or another form of agreement to move officers must be reached.

Organizational

There are several key differences organizationally that will need to be addressed. For example, differences in urban and suburban

policies must be reconciled or aggregated. Also, management must be adjusted if one agency expands or doubles to take on a consolidated unit. In the Arson Squad, consolidation could lead to the restructuring of shifts (i.e. expanding to three complete shifts).

Dual experiences of many officers are a great advantage to consolidation efforts. For example, many members of the City police currently work for the County Police, most notably, County Chief Charles Moffatt. This provides County management with a familiarity with City policies and operations.

One dimension of the current structure that contributes to the complexity of the consolidation are the multiple responsibilities of trained officers. Meeting sufficient levels of trained officers for the new consolidated squad is a complicating factor for these consolidations. The trained officers in these units have other responsibilities with their agencies, therefore, the impact that their change of status has on the rest of the agency must be understood.

Financial

The cost to the County for expansion must be considered. If, as recent reports suggest, the County becomes the host of any of these consolidated services, the City will be relieved of the service, and will have immediate cost savings. The County will then incur costs for the expansion of service. If the County charges a fee to the City for hosting the

consolidated unit and providing service to the City, cost savings for the City and total costs for the County are not known. In the cases of 911, the merger of City and District Courts, and (as proposed) in Criminal ID restructuring, immediate cost savings are realistic.

Also, costs for vehicles, equipment and insurance will decrease not increase.

Technology

In the case of Arson, Bomb and SWAT, equipment must be combined. Efficiencies will result in buying new equipment and technology in the longer-term.

Model/Agreement

Regarding, the Arson and Bomb Squads, consolidation of these units have been discussed by County/City management. In the case of SWAT, consolidation by City and County has been discussed, as has a joint urban and rural model, which could include municipal SWAT services.

There are existing models in public safety that could serve as a basis for consolidation of the Arson, Bomb and SWAT functions. Other consolidations in public safety are models for resolution of key issues, namely, 911, night court, City/District Courts, and Criminal ID.

Additional Consolidation Opportunities

The following is an overview of the findings for each component of the framework with respect to the rest

of the Public Safety consolidations, namely:

- Criminal ID
- Homicide
- Training Academies, and
- Warrant Office

Legal

All: Liability – each agency, which currently manages its liability, would need assurance of liability protection if another agency provided service to constituents in their (former) jurisdiction; efficiencies from consolidation should reduce liability exposure.

No contractual or other legal commitments exist

Statutory/Regulatory

All: City Council and County Council approval is needed

General: Regulatory: statutes aren't specific to constrain consolidation; the position for any regulatory argument would be that an attempt is being made to enhance service through consolidation

General: State Statutes -- are not specific to control consolidation; Criminal ID example: general language about "reasonable" time period for identification performance, exists, however new ID system will surpass current performance

Organizational

All: Many managers are familiar with both agencies: many City police work for County, e.g. Allegheny Chief Moffatt

Academies – training is different in City and County academies now; the more efficient but more complex solution is a merger of curriculums for a core curriculum (still could include additional training for respective agencies; and could be extended to municipal agencies)

Warrant Office – staff who are working warrants also perform other duties (court scheduling and central docketing); shifting of responsibilities and composition of new consolidated office must be decided

All: Shared policies – different practices of current agencies must be reconciled or aggregated so that important services are not dropped

Criminal ID – new restructured office will be a start-up under County administration; the transfer or reassignment of current Bureau of Criminal Identification employees must be planned

Homicide: Training -- another organizational issue for Homicide, is a significant concern if current SWAT officers are not transferred over to the new consolidated unit, and other officers need to be trained.

Financial

All: Cost to County for expansion – if, as recent reports suggest, the County becomes the host of any of these consolidated services, the City will have may be permanently relieved of the service, and will have immediate cost savings, while the County will incur costs

for the expansion of service; if however, the County charges a fee to the City for hosting the consolidated unit and providing service to the City through this unit, cost savings for the City and total cost for the County are not known; in the cases of 911, the merger of City and District Courts, and (as proposed) in Criminal ID re-structuring, immediate cost savings are realistic

All: Costs for vehicles, equipment and insurance will decrease not increase

All: Cost of double-taxing City residents – through consolidation City residents will not longer pay for the SWAT services from both the City and County

All: State funding/incentives – State funds and incentives for consolidation may be available, as was the case in the restructuring of Criminal ID, where grant funds were received for update and upgrade to computer systems

General: Fees from municipalities – as is proposed for the new Criminal ID system, new consolidated services could be extended to or include municipal police agencies, where fees could be generated for the consolidated unit

Technology

Criminal ID – restructuring of Criminal ID will equate to an upgrade of current City services; other needed system upgrades are being supported by state grants.

Model/Agreement

Criminal ID – state funds have provided a consultant to develop a

new consolidated identification system under the County, and a plan for integrating regional arraignment centers [check this with Bob]

Academies – decision to provide same curriculum (with exceptions for add-on specific training) as other counties and cities have, provides basis for model of consolidation

Homicide – other counties provide model; agreement on model has been difficult

In many cases, overlaps exist between Arson, Bomb and SWAT and the rest of the consolidations. The extent of these overlaps thereby reveals the similarities between ALL of the public safety consolidation opportunities. These commonalities are significant in developing a strategy for implementation of all of the Public Safety consolidation opportunities.

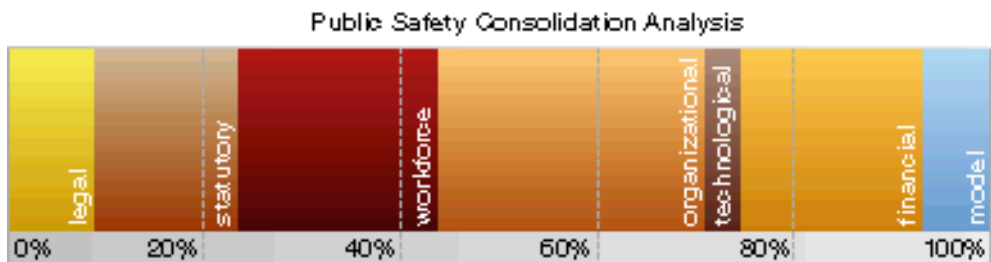
Methodology – Arson, Bomb & SWAT

Within each framework component, steps need to be taken in order to consolidate a given service. Researchers assessed the level of complexity and time commitment that would be required to complete these steps. This assessment was done

systematically and took into account uncertainties likely in the real world. (See appendix for more detail.)

Results for the analysis for Arson, Bomb and SWAT consolidations are in the chart below.

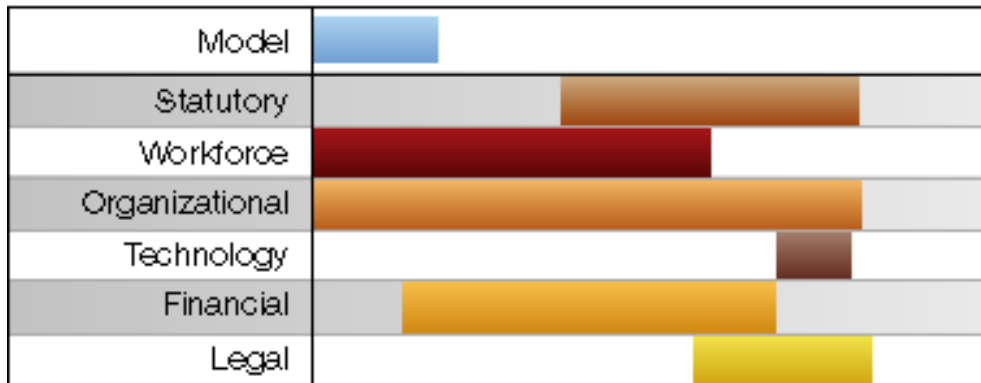
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IMPLEMENTATION STRATEGY

Consolidation Progression

Public Safety Consolidation Progression



Working from the analysis of the various components of the Arson, Bomb & SWAT consolidations, and a uniform evaluation of their complexity, a conceptualization of implementation strategy for these consolidations can be developed. While the evaluations of each component provide significant information for strategy development, the relationships between the various components can be seen more concisely when two other variables are added to strategy development. In addition to the complexity of the consolidation, the dependency of one component on another and the need for more research for that component add substantially to the understanding of the relationships between the components. The three variables used in the

formulation of an initial strategy concept, therefore, are:

- The complexity of the component
- The dependency between components
- The need for more research of the particular component

Based on the application of these three strategic organizing principles, the graph and overview below were created.

Because a complete consolidation analysis was only completed for Arson, Bomb and SWAT, a conceptualization of the implementation strategy is available only for these opportunities. For the rest of the consolidation opportunities, an overview of key strategic points for

all of the opportunities is given below.

Arson, Bomb, SWAT

The above consolidation progression graph represents for how to address the various components of a consolidation of the Arson Squad, Bomb Squad and SWAT teams, separately.

Consolidations Findings

regarding: Criminal ID, Homicide, Training Academies, and Warrant Office

Dependencies of components:

Model/Agreement - agreeing up the model for Homicide and the Training Academies is critical for moving forward with other components of these consolidations.

Need for more research:

The Organizational component requires more research in the case of Homicide; specifically to address how investigative units can be consolidated without consolidation all police functions (unified command of both City and County agencies).

The City-County Summit Working Group on Public Safety recommended more research for Bomb Squad consolidation.

Model/Agreement -- Warrant Office requires further investigation of the opportunity for consolidation; the issue of having two different types of warrants

served by the City and the Sheriff should be the focus.

Overall Key Steps

Establish standard for resolving key issues for all Public Safety consolidations before implementing any of the specific consolidations.

Address union concerns by presenting alternatives for shifting officers from one union to another, such as:

- Create task forces through intergovernmental agreements, where officers remain in their agency, but serve under the command of the task force
- Utilize the model from the 911 consolidation, where new officers and staff are brought into the new consolidated entity, and officers being reassigned are given the option of a curtailed pension with their current agency after their reassignment, or being reassigned in their current agency

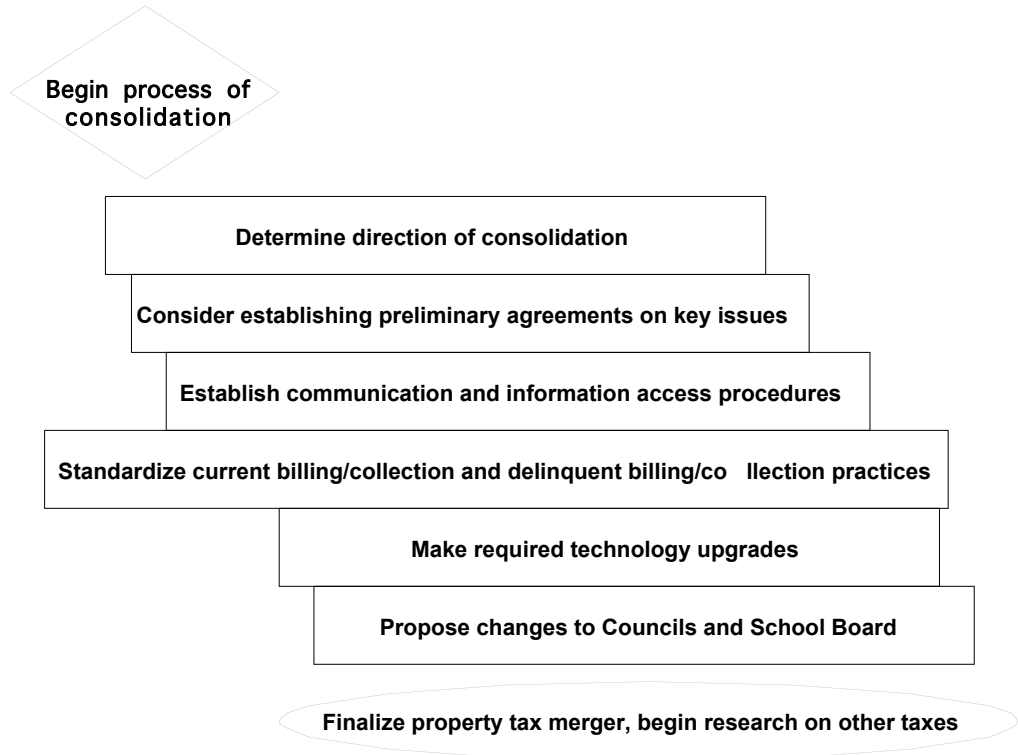
Initiate a City-County Public Safety consolidation Task Force that will resolve accountability issues and foster agreement on shared mission and policies of consolidate units for all consolidation initiatives

Develop strategy for shifting responsibilities and officers, considering all public safety consolidation. This task is much more difficult addressing one change (consolidation) at a time

Investigate opportunities for and seek partnerships with state and federal agencies which may support consolidation efforts.

Execute progressive strategy for Public Safety consolidation

the City is recognizing overlaps in jurisdictions, where City residents are paying two taxes for the same service, and where the City can reduce costs substantially. These initiatives can be seen as a first phase of a progressive strategy for



Much has been learned about Public Safety consolidation through the 911 initiative, where union/pension, organizational, and co-location issues were resolved efficiently, and through the Criminal ID initiative, which is now in its new phase of restructuring for even greater efficiency and service provision. Other examples, such as the progressive merging of the City Magistrate with the Fifth District Court show that

Public Safety consolidation. The lessons learned in these initiatives will inform subsequent phases of consolidation, including other service consolidation opportunities included and not included in this report.

Some key points regarding the implementation of the consolidations from this report are as follows:

Criminal ID – although the City and County have worked jointly in this consolidated venture for many years, the new restructuring of this function involves large cost savings for the City, state support for consolidation, a new computer identification system and other operational efficiencies, and the potential to collect new revenues (fees) to enhance operations, involving the municipal police forces as well; the Allegheny County Criminal Justice Advisory Board was the key consensus-building body in this effort, and can serve a similar role in other Public Safety consolidations

Arson, Bomb and SWAT – the issues involved in these consolidations are apparent to all parties involved; resolution of above key issues will significantly facilitate the implementation of these consolidations; other issues require less time and commitment to resolve.

Warrant Office and Training Academies – further basic research for Warrant Office consolidation must be conducted before (if) moving forward; if it does move forward, Criminal ID will serve as a good model for implementation; consolidation of the Training Academies is relatively straight-forward compared to other Public Safety consolidations – the key is agreeing upon the most efficient model for consolidation, which may be the creation of a single curriculum taught to all officers in the County (including municipalities potentially) with add-

on specific training for respective agencies (City, County, municipal)

Homicide – being the most complex and the most inter-twined with other major police functions, more research should be done on models and shared policies for urban and suburban consolidation; however, as the *Regional Cooperation Committee* report states, the specialization of this police function may facilitate a consolidation before other areas, such as the other investigative police functions (burglary and narcotics); resolution of the general key issues for Public Safety consolidation will benefit Homicide consolidation, as will the learning and cooperation that will result from the successful implementation of the above consolidations.

The same learning and cooperation that will benefit Homicide will benefit consolidations of other Public Safety consolidations not addressed in this report. Strictly from an implementation standpoint, this progress could also facilitate the consolidation of Public Safety as a whole, particularly with respect to the key issues of agreeing upon models for consolidation, organizational changes, and union and pension issues.

RECOMMENDATIONS

Utilize the Allegheny County Criminal Justice Advisory Board or create another joint planning board between the City and County to work through complex consolidation issues.

The ACCJAB has been very successful so far, and members believe that the board can play a role in the implementation of these consolidations.

Balance immediate cost savings (to the City) with enhancement of system-wide public safety functions.

Although in most cases, the City has the potential to save significant amounts of money in the consolidation of these functions, the costs to constituents will be greater if any change to any Public Safety function is not done with consideration for other related Public Safety functions and the system as a whole.

Seek state support for consolidation activities.

Using a strategic and comprehensive approach to Public Safety consolidation, many short and long-term efficiencies can be achieved and service can be greatly enhanced, bringing together the strengths of City and County and other agencies. These results equate to large pay-offs for the state as well.

PUBLIC WORKS

INTRODUCTION AND CONTEXT

At the present, the City and County are attending to slightly different needs. Urban and suburban landscapes possess some dissimilar requirements with respect to snow removal, fleet responsibilities, and street maintenance. Privatization is utilized in varying degrees by the City and County. Public works functions, such as fleet management and asphalt plants, will need to approach privatization, cost savings, and job realignment in a unified way. The City and County have different sets of equipment and approaches to equipment maintenance. The unions represented have similar programs, but they differ in training, minority representation, and labor problem solving approaches.

The information and data for Public Works was obtained from the City-County Summit Report, Regional Cooperation Committee Report, and Act 47 Recovery Plan, in addition to interviews with department directors and local experts. (The full list can be found in the appendix). Central themes were found throughout these sources, including the need to create a unified union system, attain the same level of maintenance equipment, and integrate the different maintenance needs of the City and County.

CONSOLIDATION ANALYSIS

Framework

The method of analysis used in this project is based on a framework composed of the following seven (7) components:

- Legal
- Statutory/Regulatory
- Financial
- Organizational
- Workforce
- Technology
- Model / Agreement

These components were identified through benchmark research of consolidation initiatives in the recent past in Allegheny County, and in other counties across the country. They are categories of issues that are most relevant to the implementation of a service consolidation.

As the basis for the method of analysis, the framework provides the following:

- structure for the organization of existing data on consolidation opportunities
- structure for focused research on these opportunities;
- and a basis for uniform analysis and strategy.

The seven components of the framework are used consistently in all aspects of each consolidation analysis in this report, providing a uniform method to discuss the various unique consolidation opportunities, compare them, and

synthesize information about all of them.

Methodology

Within each framework component, steps need to be taken in order to consolidate a given service. Researchers assessed the level of complexity and time commitment that would be required to complete these steps. This assessment was done systematically and took into account uncertainties likely in the real world. (See appendix for more detail.)

Results for the analysis of Public Works are in the chart below. *(Components with larger bars will be more complex and time consuming to complete than components with smaller bars.)*

Legal

Currently no overt legal constraints hold back a consolidation of City and County public works. However, City and County Council approval is imperative.

Statutory/Regulatory

Pittsburgh code would need to be changed. Department of Engineering and Construction will have to under Public Works.

Workforce

Although City and County have the same unions, contracts need to be established with similar training, minority (which is presently 15% for County and 25% for City) representation, and labor problem solving for both employees of public works. Tradesmen, teamsters, laborers, and clerks would need to be brought together.

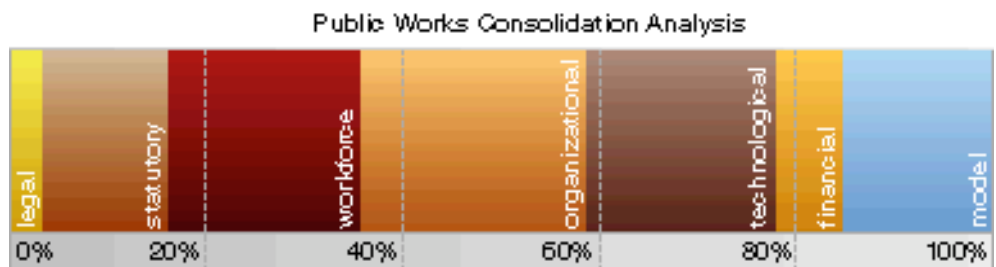
Organizational

A process must be established that can best handle the different service needs facing urban Pittsburgh and suburban Allegheny County as well as their respective managerial philosophies.

The combined Public Works will need to create a unified dedicated parks crew for the parks system, expanding on the dedicated parks crew currently used by the City.

Financial

A method of combining the same fleet management, privatizing outdated services like asphalt is a double-edged sword of cost savings for City and County against loss of jobs such production provides.



Technology

A common system needs to be established to house and process data. This system must save data from past years and have the capacity to merge information from the two systems. The City's use of the Oracle based Accela Reporting system displays a good example.

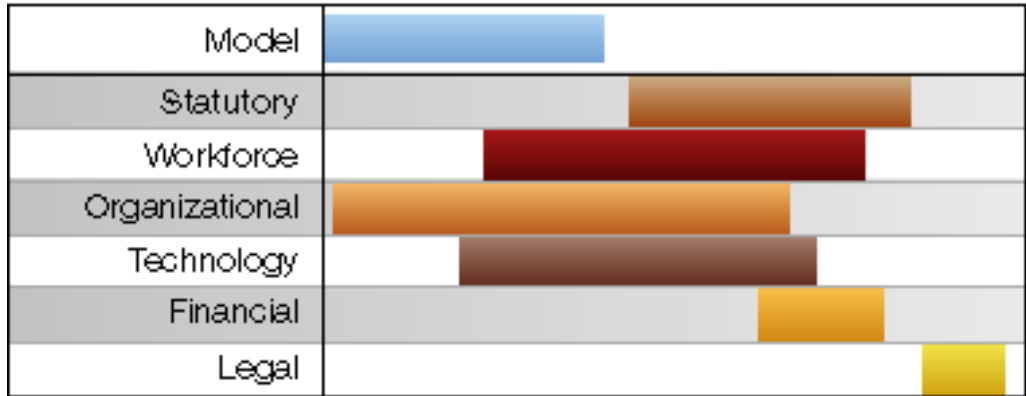
Model/Agreement

Currently, a model for consolidation has not been identified.

IMPLEMENTATION STRATEGY

Consolidation Progression

Public Works Consolidation Progression



The team developed a two-pronged implementation strategy. The first prong of the strategy is a consolidation progression. It is a visual representation of how the framework components interact with each other in terms of complexity, dependency on other components, and the need for more research. The consolidation progression (below) demonstrates how to proceed with the implementation. Complexity is represented by the length of the component bar. Dependency and the need for more research are represented by the sequence of bar placement.

The graph below is a visual comparison and chronological progression between major hurdles to consolidate the public works system. Fostering a spirit of cooperation between the City and County is important. Addressing the differing needs between the urban City and the suburban County have been addressed to a

limited extent in the Agility Agreement.

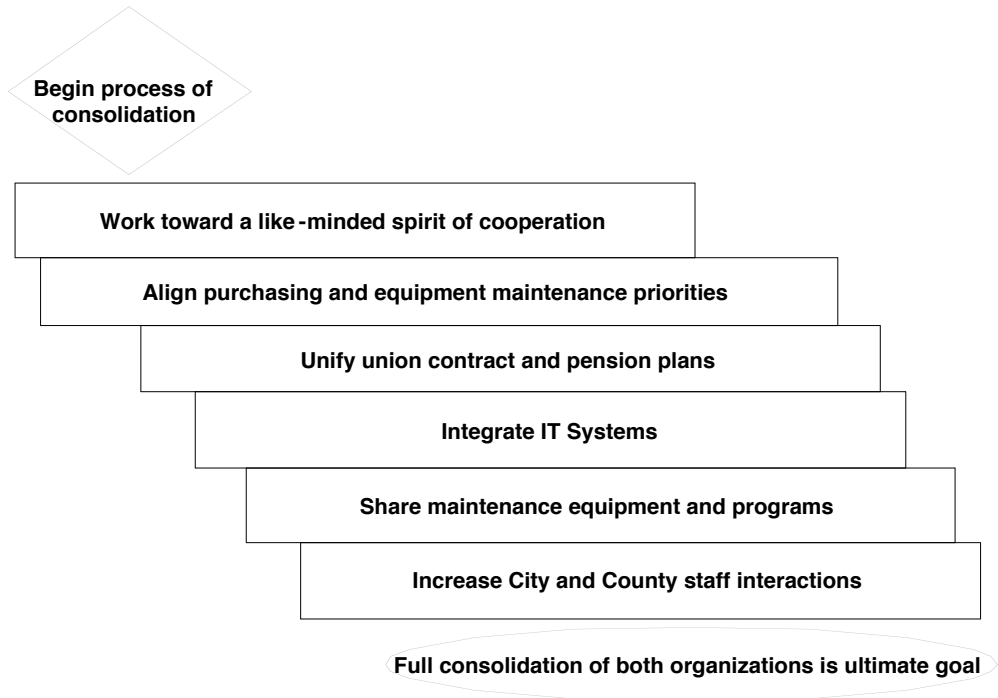
However, this practice needs to be expanded and sustained. The regulations involved in getting City and County approval and support may be a direct reflection of how developed the union contracts can be accomplished and a consolidated IT management system can be furnished with shared histories. Since no legal concerns are currently known, it has little representation on the road to consolidation.

Since the vast majority of Public Works employees are members of a union, it is imperative that the union contracts, pension plans, and minority representation standards be set under a unified system. Pension issues can be dealt with in the short term by arranging workforces to take best advantage of parallel pension systems and ultimately blend employees under a single pension

system. It is also crucial that equipment and personnel are uniformly handled and that a dedicated parks crew is created. Finally, creating a united and cohesive IT system that works equally well among former County and City employees is critical.

It is important in the consolidation decisions that are made to focus on maintaining the strengths of each Public Works system. The County Public Works provides services for suburban districts with greater land distribution. These strengths should be allowed to exist while working on obstacles that face the City and County with respect to the need to privatize outdated services and plants, as well as potential workforce shifts that may occur.

KEY STEPS



Work toward a like-minded spirit of cooperation.

Develop a spirit of cooperation between the City and County offices of Public Works.

Align purchasing and maintenance of equipment priorities.

Begin purchasing and maintaining similar types of equipment across City and County.

Unify union contract and address pension system differences.

Start combining contracts within unions, including public works employees who work on park maintenance. Pension system concerns can be addressed as indicated above.

Integrate IT systems.

Integration of unified public works system while maintaining history from both City and County respectively in same location.

Share maintenance equipment and programs.

Increase City and County staff interactions.

Merge offices.

RECOMMENDATIONS

Emphasize spirit of cooperation as being essential

In the process of consolidation, solicit input from and involve City and County employees

Both City and County should accept changes for betterment of entire community

Acknowledge the strengths of both governments Recognize that union cooperation is imperative

From union contracts to pension plans to minority representation, workers from both the City and County need to feel that they are not being left out of the consolidation process.

The consolidated City-County department should operate under one single union system.

Bring together technology systems

Software will need to be able to incorporate past and present data.

PARKS AND RECREATION

INTRODUCTION AND CONTEXT

At present, neither the City nor the County have a clear best practice by which one park system could be assimilated into the other. The City Parks and Recreation and County Parks and Recreation are both highly dependent on Public Works from the respective City and County for maintenance and upkeep. The consolidation of parks systems is highly dependent on the consolidation of City and County Public Works.

Researching Parks and Recreation systems involved gathering information from the City-County Summit Report, Regional Cooperation Committee Report, as well as meeting with officials from the City Parks, County Parks, Pittsburgh Parks Conservancy, and Regional Asset District. There were central themes found within the sources including the need to resolve deferred maintenance, the desire for a “Green Web” that interconnects parks through trails and paths, and the integration of an information technology system. Many specific sets of information and priorities were up to interpretation depending on the vantage point of any one organization.

CONSOLIDATION ANALYSIS

Framework

The method of analysis used in this project is based on a framework composed of the

following seven (7) components:

- Legal
- Statutory/Regulatory
- Financial
- Organizational
- Workforce
- Technology
- Model / Agreement

These components were identified through benchmark research of consolidation initiatives in the recent past in Allegheny County, and in other counties across the country. They are categories of issues that are most relevant to the implementation of a service consolidation.

As the basis for the method of analysis, the framework provides the following:

- structure for the organization of existing data on consolidation opportunities
- structure for focused research on these opportunities;
- and a basis for uniform analysis and strategy.

The seven components of the framework are used consistently in all aspects of each consolidation analysis in this report, providing a uniform method to discuss the various unique consolidation opportunities, compare them, and synthesize information about all of them.

Methodology

Within each framework component, steps need to be taken in order to consolidate a given service. Researchers

assessed the level of complexity and time commitment that would be required to complete these steps. This assessment was done systematically and took into account uncertainties likely in the real world. (See appendix for more detail.)

Results for the analysis of Parks and Recreation are in the chart below. *(Components with larger bars will be more complex and time consuming to complete than components with smaller bars.)*

The sections below give greater detail about the insights and vital data gathered through the course of research on this service area:

Legal

Legally there are few concerns. There do not appear to be contracts or liabilities that impede consolidation.

Statutory / Regulatory

A third party “Regional Parks Council” would add statutory complications to a consolidation. Acquiring City and County Council approval may be required in certain areas.

Workforce

Many of the workforce complexities will be resolved with

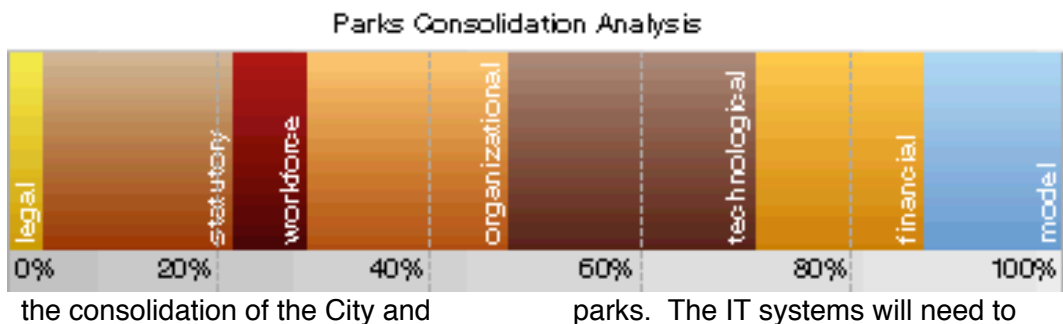
County Public Works departments. The vast majority of the workforce is housed within Public Works.

Organizational

Currently, a clear best practices plan does not exist among the City and County. Regional Parks Councils have been successful in other cities and should be explored for this region. Regional Parks Councils have been effective at providing high level leadership to parks systems. The Allegheny Regional Asset District (RAD) is poised to play an active roll in providing leadership to the parks. RAD currently funds a significant portion of the 14 regional parks. RAD funds 57% (\$14 million) of the budget for the County parks and 63% (\$5 million) of the budget for the City parks. The Pittsburgh Parks Conservancy is also a likely member for a Regional Parks Council because of its expertise.

Consolidation is more challenging across the smaller non-regional parks than throughout the County and City due to less direct funding streams. Decisions will need to be made regarding the smaller neighborhood parks.

A unified permit system needs to be established for both the City parks and the County regional



the consolidation of the City and

parks. The IT systems will need to

be consolidated before this so that all applicants can apply on line.

Currently the City Public Works uses a Dedicated Parks Crew that specializes in parks maintenance. An expanded form of the Dedicated Parks Crew from the City Public Works is needed to provide top maintenance to the parks system.

Financial

A method of resolving the combined deferred maintenance issues among both City and County parks needs to be developed. Joining funding from the Regional Asset District, general funds, and grant writing will also need to take place.

Technology

A consolidated parks management model necessitates a joint information technology system to assist with integration. Examples for strong parks management IT systems include the Class system used by the County and the Oracle based Accela used by the City. These two systems work in conjunction with the Public Works departments.

Model/Agreement

The City and County can look to model cities like Chicago and Boston for well-functioning regional parks systems. Consensus in Pittsburgh needs to take place regarding the model that would suit the parks needs and capacity best. It is important to indicate that these are not models that suggest how best to bring together City and County parks. Rather, Chicago and

Boston offer excellent examples of highly effective parks systems.

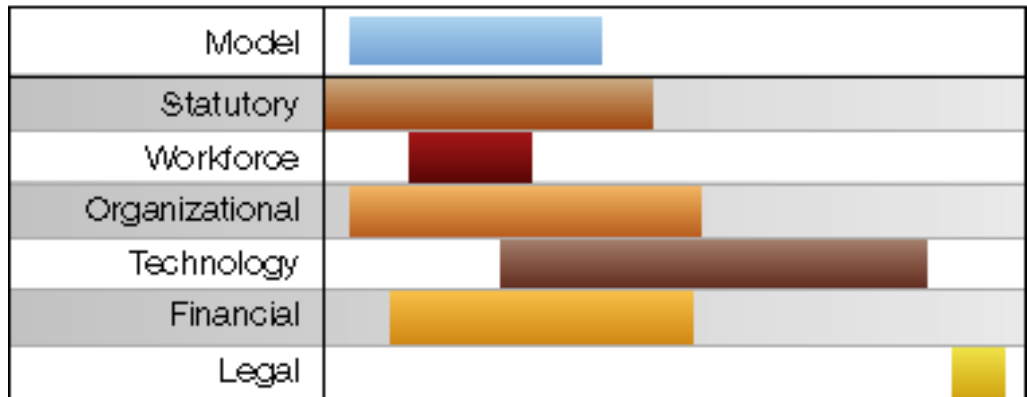
Chicago has a strong parks district with real management powers, operating with a budget of approximately \$160 million, the Chicago Parks District employs approximately 3,700 full-time staff to operate 580 parks, numerous other facilities, and related program services.

Boston has an integrated emerald necklace of interconnected trails and paths for the region to follow. Over the past decade, almost \$60 million in capital expenditures for parks and waterway improvements have been in the Emerald Necklace by the City of Boston and the Town of Brookline. These efforts have included improved pathways, plantings, and signage, bridge repairs, and the restoration of boardwalks and buildings.

IMPLEMENTATION STRATEGY

Consolidation Progression

Parks Consolidation Progression



The team developed a two-pronged implementation strategy. The first prong of the strategy is a consolidation progression. It is a visual representation of how the framework components interact with each other in terms of complexity, dependency on other components, and the need for more research.

The consolidation progression above demonstrates how to proceed with the implementation. Complexity is represented by the length of the component bar. Dependency and the need for more research are represented by the sequence of bar placement.

The above graph represents a visual comparison and chronological progression between major hurdles to consolidate the parks system. The regulations surrounding getting City and County approval and support for a consolidation make the statutory component a needed and potentially challenging issue for consolidation from the onset.

The establishment of a Regional Parks Council will be next large opportunity for consolidation and the technological integration is another key challenge following. Since little legal concerns are currently known, it has little

representation on the road to consolidation.

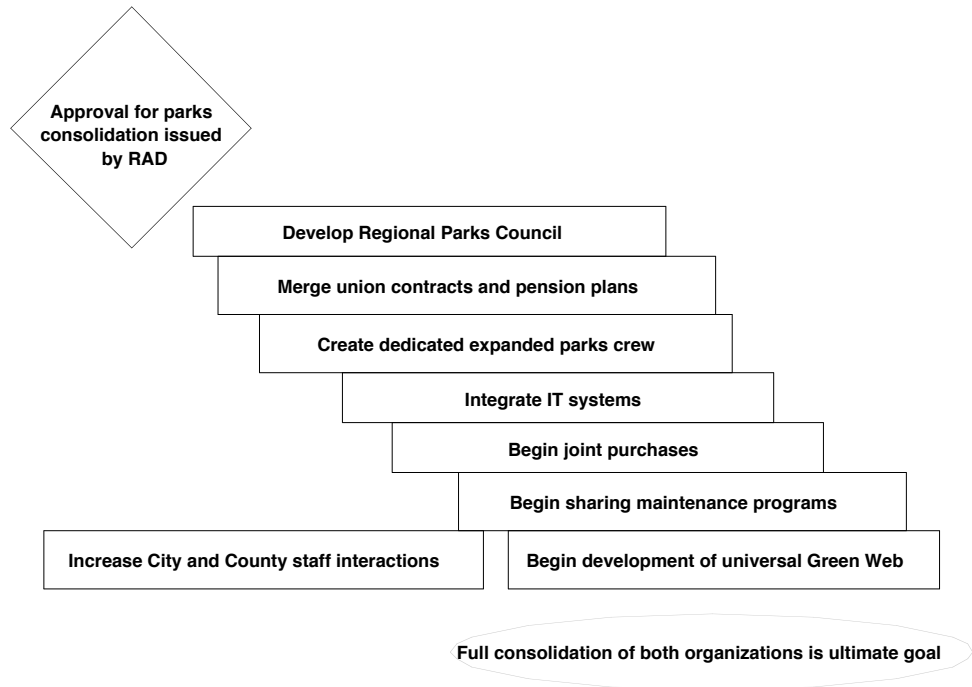
Among the seven components, organizationally, the parks systems will be adjusted the most with a consolidation. The large unified Dedicated Parks Crew and IT system will need to be established. Potentially an expanded Green Web and concessionaire approach to parks programs could also be established.

A consolidation between the 1,700 acres of the City parks and 12,000 acres of the County regional parks is feasible but it must be done with an emphasis on maintaining the strengths of each parks system.

The City parks have a well defined structured programs like arts, community festivals, Cinema in Parks, and sports programs which attract thousands of County residents each year. The County parks provide large green spaces with strong natural amenities which conversely bring City residents to the County parks.

These strengths should be allowed exist while simultaneously tackling problems that plague City and County parks alike with deferred maintenance, grant writing, and trail interconnecting coordination.

KEY STEPS



Consolidating the parks systems of the City and the County cannot happen all at once. There are numerous key steps along the way that allow this transition to unfold.

Request Approval from Allegheny Regional Asset District for parks consolidation

The Regional Asset District (RAD) covers the majority of funding for the City Parks and the County Parks and will likely play a key role in establishing “Regional Parks Council”, their compliance to the consolidation is crucial.

Develop a Regional Parks Council

A “Regional Parks Council” is established in the absence of a clear best practices and uses get local authority and buy-in from

both City and County governments. The Regional Asset District and Pittsburgh Parks Conservancy are likely key players in the “Regional Parks Council” because they represent local interests (rather than state interests) and have great knowledge as to the direction of a consolidation. Chicago’s Parks District Council is an example of successful parks council that oversees a region.

Unify union contract and address pension system differences.

Combine union contracts and address pension system differences for small number of employees who work specifically for Parks and Recreation, and are unaffiliated with Public Works (mostly clerk.) Pension system

concerns can be addressed as indicated above.

Expanded dedicated parks crew

Create a Dedicated Parks Crew from the Public Works that overlooks both City and County Parks as a unified body.

Integrate information technology systems

IT systems are integrated so that recreational programs can readily retrieve past and present data.

Align purchasing priorities and efforts

Begin joint purchasing which includes the whole regional parks system. This allows single purchases to be made without duplication.

Begin sharing maintenance programs

Maintenance programs are shared for recreational events in parks readily available for all 14 regional parks and City cites.

Increase interaction between City and County staff

Employee interactions between City and County Parks and Recreation departments increase, fostering cohesiveness among all employees.

Begin development of universal green web

There is a marked priority between both City and County Parks and Recreation departments is the development of Green Web. Beginning on this project as Parks and Public Works approach consolidation, this vision is

magnified to encompass the entire region.

Merge offices

The offices between the City Parks and Recreation and County Parks and Recreation merge.

RECOMMENDATIONS

Place focus on the 14 regional parks plus the smaller 171 City cites.

The smaller parks are under authority of municipalities and do not receive funding from the Regional Asset District. These parks will be consolidated as part of the City-County consolidation. Although, the smaller neighborhood parks in City are not receiving funding from the Regional Asset District, they will also be consolidated. Without these smaller parks' membership in the consolidation, a two tiered parks system is established whereby these smaller parks will be neglected. The smaller (non-regional) County parks will be under the tutelage of their respective municipalities.

Priority needs to be placed on an improved parks system rather than immediate cost savings.

Although long-term savings are evident, a better maintained parks system with lively events and decreased deferred maintenance issues is the number one priority for this consolidation.

***A “Regional Parks Council”
needs to be under authority of a
local consensus***

Although a third party represents neither the total interest of the City nor the County, when best practices do not exist, the development of third party can be a local interest in order to alleviate potential additions to legal complexity and red tape.

***Utilize a Dedicated Parks Crew
structure to maintain the parks
system***

The best parks systems in country include Seattle, New York City, Chicago, and Minneapolis. None of these parks systems are bifurcated along Parks and Recreation programs and Public Works parks maintenance. In all of the nation’s best premier parks systems, the maintenance of parks system is controlled by the parks. However, due to the fact that Public Works has shown that the realignment of parks maintenance staff during winter months to other Public Works responsibilities, the bifurcated system appears best for this region.

Currently the City Public Works uses a Dedicated Parks Crew that specializes strictly on parks maintenance. An expanded Dedicated Parks Crew from Public Works is needed to provide top maintenance to the parks system. A Dedicated Parks Crew provides Public Works staff ownership for parks upkeep with potential salary-based incentives to the best maintained parks.

***Strive to create a “Green Web”
system for parks.***

A Green Web is a key interest for both the City and County Parks. A consolidated parks system interconnected with paths and trails would expand upon the smaller Green Webs existing separated in City and County. Although many trails and paths currently run parallel to road systems, bridging parks across such a wide ranging system still has much work to be researched.

***Provide concessionaire
municipal golf courses and
wave pools so that parks
services can reverse the
draining of financial assets into
money generators.***

These parks programs do not need to be privatized but should work in conjunction with private corporations to offer top service with personal ownership of these services.

ECONOMIC DEVELOPMENT

INTRODUCTION AND CONTEXT

The Urban Redevelopment Authority (URA) and Allegheny County both strive to promote economic growth in the region through residential redevelopment projects, urban development programs to attract large corporations, and small business assistance initiatives. Leaders within both organizations recognize that a merger will result in a logical one-stop-shop for citizens and businesses to meet all of their economic development needs. However, various differences exist between the departments that must be more thoroughly evaluated in order to achieve a functional consolidation of economic development services. The various differences range from the real estate loan review processes to the diversity of funding streams to the differing technological standards in areas like Geographical Information Systems (GIS).

Limited research has been conducted on consolidating the economic development functions of the City and County, however, there seems to be a local interest in exploring the possibilities that exist in bringing the two together. The City-County Summit Working Group focused some of its efforts on Economic Development, as did the Act 47 Report. There is recent history of the two departments working together as evidenced when Dr. Mulugetta Birru served as director of both organizations from 1997 – 2000. Finally, Mayor

Tom Murphy and Chief Executive Dan Onorato expressed that they would like to explore the possibility of an economic development department merger in recent press release (May 2004).¹²

CONSOLIDATION ANALYSIS

Framework

The method of analysis used in this project is based on a framework composed of the following seven (7) components:

- Legal
- Statutory/Regulatory
- Financial
- Organizational
- Workforce
- Technology
- Model / Agreement

These components were identified through benchmark research of consolidation initiatives in the recent past in Allegheny County, and in other counties across the country. They are categories of issues that are most relevant to the implementation of a service consolidation.

As the basis for the method of analysis, the framework provides the following:

- structure for the organization of existing

¹² Joint Press Release: “Mayor Murphy and Executive Onorato Announce Initiative to Merge Economic Development Operations,” May 28, 2004.

- data on consolidation opportunities
- structure for focused research on these opportunities;
- and a basis for uniform analysis and strategy.

The seven components of the framework are used consistently in all aspects of each consolidation analysis in this report, providing a uniform method to discuss the various unique consolidation opportunities, compare them, and synthesize information about all of them.

Methodology

Within each framework component, steps need to be taken in order to consolidate a given service. Researchers assessed the level of complexity and time commitment that would be required to complete these steps. This assessment was done systematically and took into account uncertainties likely in the real world. (See appendix for more detail.)

Results for the analysis of Economic Development are in the chart below. *(Components with larger bars will be more complex and time consuming to complete than components with smaller bars.)*

The sections below give greater detail about the insights and vital data we gleaned through the course of research on this service area:

Legal

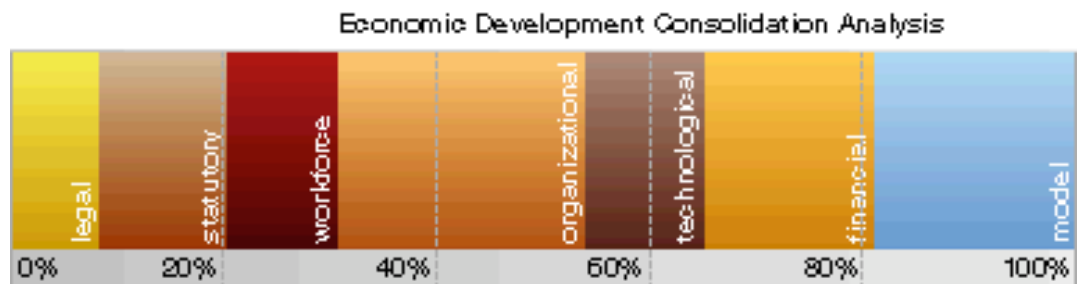
No contracts exist that would impede a consolidation.

Statutory/Regulatory

Even though both City and the County are governed by Home Rule charters, experts maintain that ordinances changes will need to be modified for government service consolidation. If the focus is shifted to government consolidation, then state legislation will also have to be modified.

Workforce

Labor contracts do not pose a challenge to an economic development department consolidation. Furthermore, staffs in both departments possess similar skill-sets, which negate the need for additional training. (A post consolidation analysis would prove beneficial to determine the need for new staff.)



dissolved and how to manage a dissolved authority's assets. As with any merger, issues of different policies, missions, guidelines, organizational cultures and organizational structures must be resolved. For example, the Allegheny County planning function, is a part of the Economic Development Department. In contrast, the City Planning Department is a separate entity. In addition, the URA has a Real Estate Loan Review Committee and the County does not.¹³ Additionally, a solution must be developed to address concerns of accountability in a merged department.

Financial

Both Economic Development departments derive revenue and funding from local, state and federal levels. Currently, the URA acquires local funds via taxes. In contrast, the County obtains local funds via fees. When the economic development departments merge, they will need to develop a local funding strategy that will either keep the local funding methods the way they are currently or create a coherent strategy wherein both departments use either funds or fees. The state and federal funding will largely depend on the changes to ordinances and state legislation.

Technology

The primary technological concern relates to the Geographical Information Systems (GIS) that are

used in each department. The standards between the departments in their use of GIS are uneven. GIS is not mission critical to the consolidation of the economic development departments.

Model/Agreement

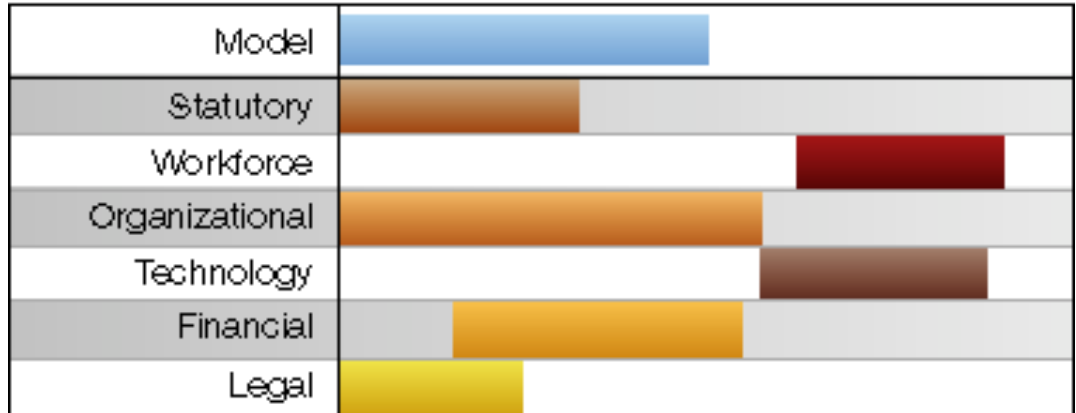
A quasi Economic Development models existed when Dr. Birru directed both departments. However, even though he directed both departments, it was not a comprehensive consolidation. Agreements exist within the departments that a merged economic development department will result in a more responsive entity to serve the needs of the community.

¹³ City-County Summit Report, Economic Development Working Group Report, March 26, 2004

IMPLEMENTATION STRATEGY

Consolidation Progression

Economic Development Consolidation Progression

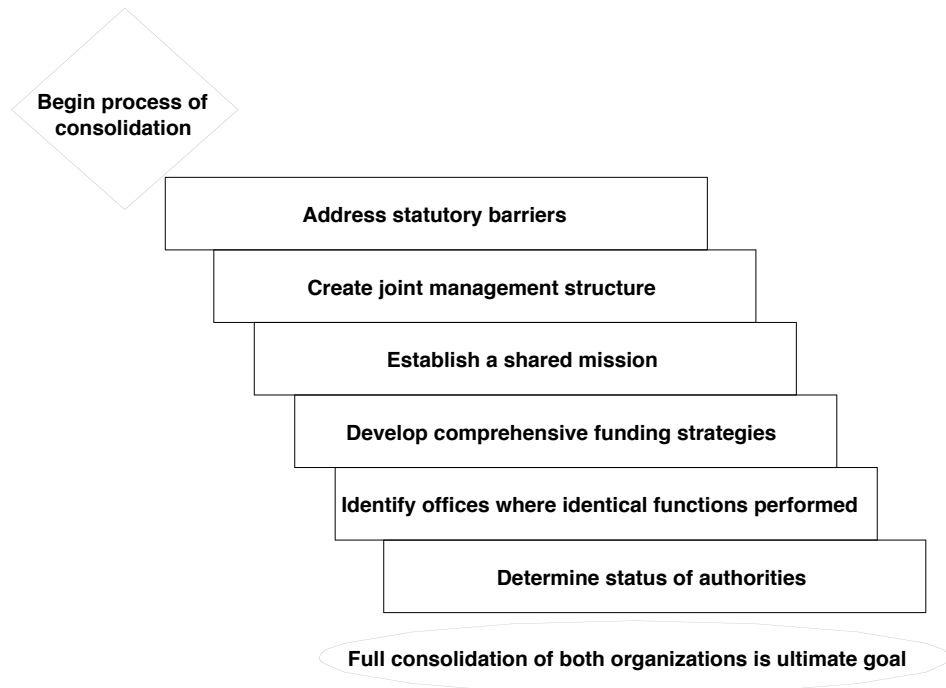


The team developed a two-pronged implementation strategy. The first prong of the strategy is a consolidation progression. It is a visual representation of how the framework components interact with each other in terms of complexity, dependency on other components, and the need for more research. The consolidation progression (above) demonstrates how to proceed with the implementation. Complexity is represented by the length of the component bar. Dependency and the need for more research are represented by the sequence of bar placement.

Using the seven-tiered framework, the results displayed in the above figure represent levels of complexity. Initially, statutory, legal and organization complexities should be addressed.

Statutory issues should be focused on to ensure that the joint department can request state and federal grants as a new entity and maintain a consistent funding stream. Organizational concerns will require the most amount of time; therefore, they should also be focused on immediately. Financial concerns primarily relate to local funding streams. The local funding approach can remain in place until a working group decides on an alternative strategy. Technological matters relate to GIS and can also start later because they are not critical to the merger of the departments. Legal and Workforce issues as they relate to contracts were not significant to the economic development consolidation. The most critical areas of an economic development merger are organizational, financial and statutory.

KEY STEPS



Address statutory barriers.

Officials should begin drafting the necessary changes to the ordinances in order to expedite the merger. Statutory barriers will impact the grants provided by the state and federal agencies because awards are often calculated using population and census tracts data.

Create a joint management structure.

A joint management structure will ensure that both economic development departments work in concert for the development of the region. The management structure will also promote sharing of services (i.e. loan review committee) and specialized skills (GIS).

Establish a shared mission

The missions and cultures of both departments differ slightly. By creating a shared mission, these issues can be resolved.

Develop comprehensive local, state and federal funding strategies

Comprehensive funding strategies will enable the merged department to streamline the financial aspect of economic development, including but not limited to receiving grants and managing bonds and other liabilities.

Identify offices where identical functions are performed

By identifying the offices where identical functions are performed; the departments will be able to facilitate the consolidation by merging those offices.

Decide on status of authorities

Each department maintains authorities for areas such as higher education buildings (in the City) and authorities for the improvements of municipalities (in the County). Some of these authorities are not even staffed or equipped for daily operations. However, many authorities do have assets. The joint management and/or dissolution of these authorities should be discussed.

RECOMMENDATIONS

Establish a working group to discuss the possibility for a consistent local funding strategy.

The group should examine the local funding streams, those that come from state and federal funding, as well as fees and taxes, in order to develop a comprehensive funding strategy for economic development activities in Allegheny County and the City of Pittsburgh.

Convene a new board of advisors to address accountability issues.

APPENDIX A

THE FRAMEWORK

The method of analysis used in this project is based on a framework composed of the seven following components: Legal, Statutory/Regulatory, Financial, Organizational, Workforce, Technological, and Agreement/Model. These components were chosen after researching service consolidation initiatives both in the recent past in Allegheny County, and in other Counties around the country. The components of the framework are categories of issues that are most relevant to the implementation of a service consolidation.

Purpose

As the basis for the method of analysis, the framework provides the following:

- structure for the organization of existing data on consolidation opportunities;
- structure for focused research of these opportunities; and
- a basis for uniform analysis and strategy.

The seven components of the framework are used consistently in all aspects of each consolidation analysis in this report, thereby providing uniformity in the method of analysis and strategy.

Using the framework

The steps in utilizing the framework in the method of analysis and in developing implementation steps and strategies for consolidation are as follows.

Organizing existing research - the findings from available reports and studies of the respective consolidation opportunities were aggregated using the framework components as categories for all of the data and findings. This process provided the researchers with an understanding of the consolidation according to the components and revealed where more research was needed. The seven components of the framework and details for each are shown below

Focused research – given that the purpose of this project was to aggregate existing information, not execute comprehensive and detailed action plans for implementation, the researchers next conducted high level and expert interviews to fill in data gaps for important issues, and to synthesize the findings so far. The questions that researchers used as a guide are listed below.

Generalizing the findings – the combined findings for each consolidation were then discussed by the team in order to generalize the findings into a listing of issues potentially found in the various components of the consolidation. As the methodology section details more thoroughly, this common listing of the potential issues became the basis for an objective and systematic evaluation

of the complexity of each consolidation. Table 1-2, the Evaluation Matrix, shows the complete breakdown of critical issues within each component.

Evaluation Criteria

These criteria were evaluated for each service are examined to assess complexity and time commitment a given consolidation component.

Model / Agreement

- Clarity of structure of consolidation
- Adoption / discussion / existence of a model for given consolidation

Organizational

- Accountability
- Establish Shared Mission
- Merging Staff
- Merging Locations / Expansion of one location
- Operations (Timetables, billing dates, coordination with other agencies)
- Establish Shared Policies
- Changing / Shifting Job Descriptions (Staff serving multiple responsibilities)
- Privatization

Workforce

- Existence of union contracts (Would re-negotiation, termination be necessary? Is it possible to combine, move staff from one to other?)
- Existence of non-union staff
- Affect on pension system
- Need for expansion of staff
- Training / Re-Training to different standards; keeping sufficient expertise
- Connection to broader union negotiation / arbitration
- Outsourcing

Technology

- Establishment / creation of common platform
- Need for Immediate Upgrade (Capacity / Functionality)

Financial

- Understanding of likely costs and potential cost savings (Costs related to personnel, new contracts, research required, capital investment, insurance, technology)
- Deferred maintenance issues
- Revenue streams (Potential for loss or gain in revenue streams, possible external funding and grants to facilitate consolidation)
- Fees
- Intergovernmental transfer changes

Legal

- Contracts to provide services (length of term and funding stream)
- Contracts with service providers (Is termination or re-negotiation required?)
- Increasing liability for adequate service (private lawsuits)

Statutory

- Are changes to code required? (Assess number and complexity of changes)
- City and County Council approval
- Standards requirements (city / county / state/ federal)
- Any state legislative approvals required?

APPENDIX B

THE METHODOLOGY

The method of analysis for the project was comprised of two essential activities. The first key dimension was the development of a standardized and uniform framework that allowed for a consistent analysis of the six consolidation opportunities covered in this report. The next aspect of the method of analysis was the creation and evolution of a methodology in which to analyze the data systematically.

To help structure the analysis, a multi-criteria decision-making process was employed to the research. This process quantitatively and visually described the components of the framework in terms of complexity and time commitment for the consolidation of an individual service area.

The goal of the methodology was to provide a quantitative, academic rigor to supplement the qualitative analysis. Through this rigor, judgments of the qualitative analysis could be tested. One of the key benefits of the analysis is that it permitted a level of standardization not possible with purely qualitative judgments. For example, each complexity could be referenced via a standardized subjective score chart to generate consistent results across each service consolidation. Realistically, a consolidation of a given service may turn out to be easier or more difficult than assessed. Therefore, in addition to accounting for variations in assessments of researchers, the process accounts for the levels of uncertainty in the scoring process.

Rather than relying on standalone qualitative judgments, the process resulted in a significantly more disciplined and focused approach through the use of concepts of uniformity and uncertainty in the data analysis. While this methodology is quantitative in nature, it is important to remember this is still inherently a qualitative exercise that facilitates the analysis of the individual components of a given consolidation. The results are used to create a visual representation of the feasibility for each service consolidation.

Methodology Process

1. Analyze the service consolidation using a seven component framework.
2. Design a standardized subjective scale to assess the levels of complexity within each component.
3. Assign a 'most likely score' using standardized subjective scale.
4. Assign a range of scores (upper and lower bounds to probability distributions).
5. Normalize scores for each service consolidation analysis by having one person examine the scores of each analysis. (*i.e. Check for inconsistencies of scores*)
6. Assign a probability distribution to the scores: either a triangular or uniform distribution. If a researcher was confident about their best guess, then a triangular distribution was assigned. If a researcher was not confident about a best guess, and was only confident with a range of values with equally likely probability, a uniform probability distribution was assigned. These distributions were applied to each component for each consolidation opportunity.
7. Simulate 1,000 outcomes using standard forecasting software in Microsoft Excel with each score range and associated distribution to account for uncertainties.
8. Extract the mean from the 1,000 simulated distribution results and assign that value to the score for the respective component.
9. Compare the scores for each respective component against each other to evaluate the proportional relationships of each consolidation component.

City County Consolidation Scoring Simulation Analysis

Complexity and Time Commitment Estimates

MEANS (from simulation)	Legal	Stat.	Work.	Org.	Tech.	Fin.	Model
IT	55	30	42	45	22	30	67
Parks	10	55	20	60	70	50	40
Public Safety	22	37	53	72	5	50	18
Public Works	10	40	60	72	60	20	45
Tax Collection	12	49	17	54	27	35	65
Econ. Dev.	25	37	33	75	35	50	60

MIN	Legal	Stat.	Work.	Org.	Tech.	Fin.	Model
IT	20	20	30	30	10	20	60
Parks	0	45	10	50	60	40	30
Public Safety	15	20	40	60	0	35	15
Public Works	0	30	50	60	50	10	40
Tax Collection	5	35	10	40	20	25	50
Econ. Dev.	20	20	20	60	20	40	50

BEST GUESS	Legal	Stat.	Work.	Org.	Tech.	Fin.	Model
IT	65	30	45	35	25	30	75
Parks	10	55	20	60	70	50	40
Public Safety	20	40	50	75	0	50	20
Public Works	10	40	60	75	60	20	50
Tax Collection	10	40	15	55	25	35	80
Econ. Dev.	25	30	30	75	40	45	70

MAX	Legal	Stat.	Work.	Org.	Tech.	Fin.	Model
IT	80	40	50	70	30	40	80
Parks	20	65	30	70	80	60	50
Public Safety	30	50	70	80	15	65	30
Public Works	20	50	70	80	70	30	60
Tax Collection	20	70	25	65	35	45	90
Econ. Dev.	30	60	50	90	45	65	80

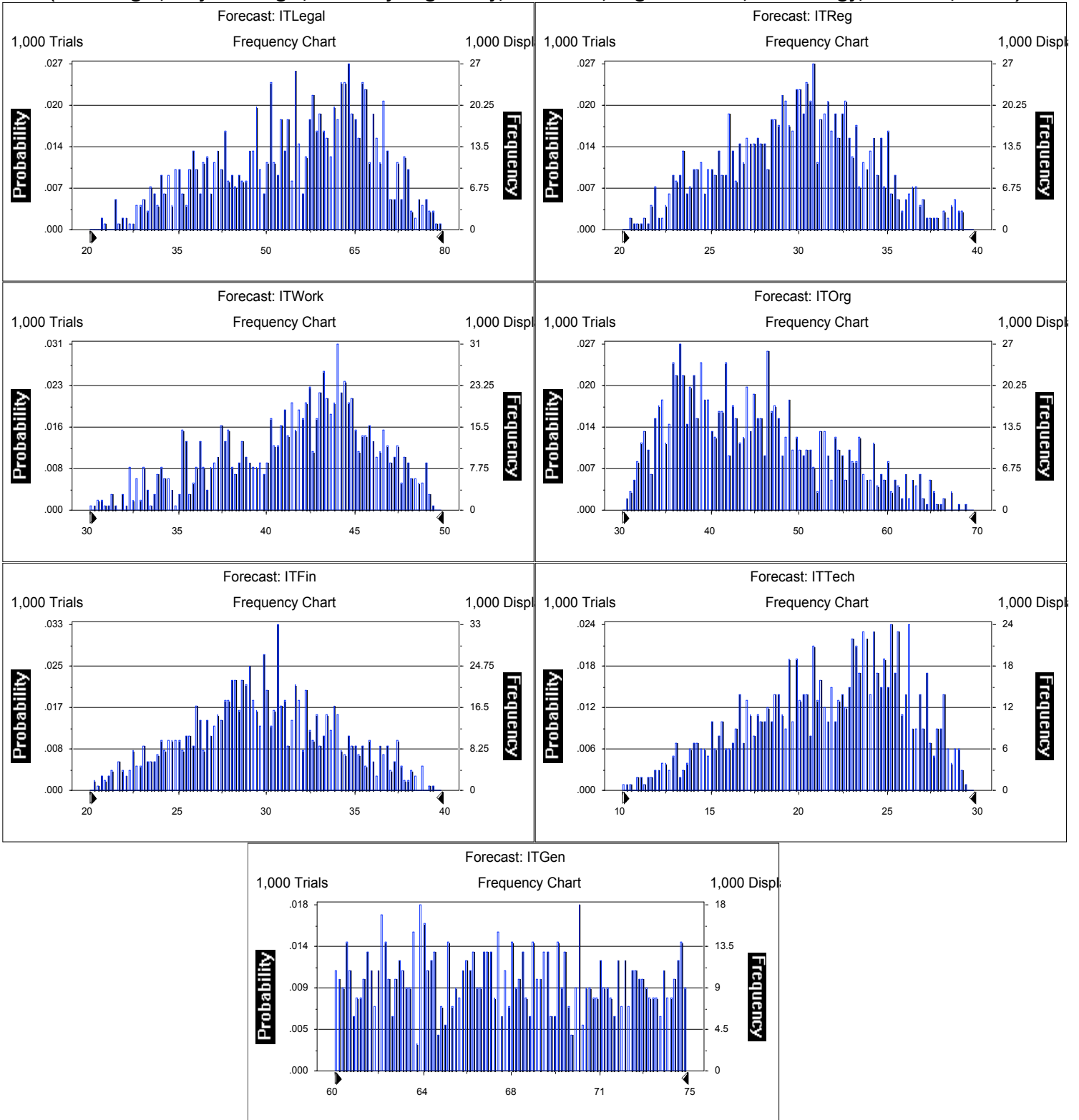
IF1 Triangular, If 0 uniform--- (if uniform, then no mode)

DISTRIBUTION	Legal	Regul.	Work.	Org.	Tech.	Fin.	Model
IT	1	1	1	1	1	1	0
Parks	1	1	1	1	1	1	0
Public Safety	1	1	1	1	1	1	0
Public Works	1	1	1	1	1	0	0
Tax Collection	1	1	1	1	1	1	0
Econ. Dev.	1	1	1	1	1	1	0

Information Technology Complexity and Time Commitment Analysis

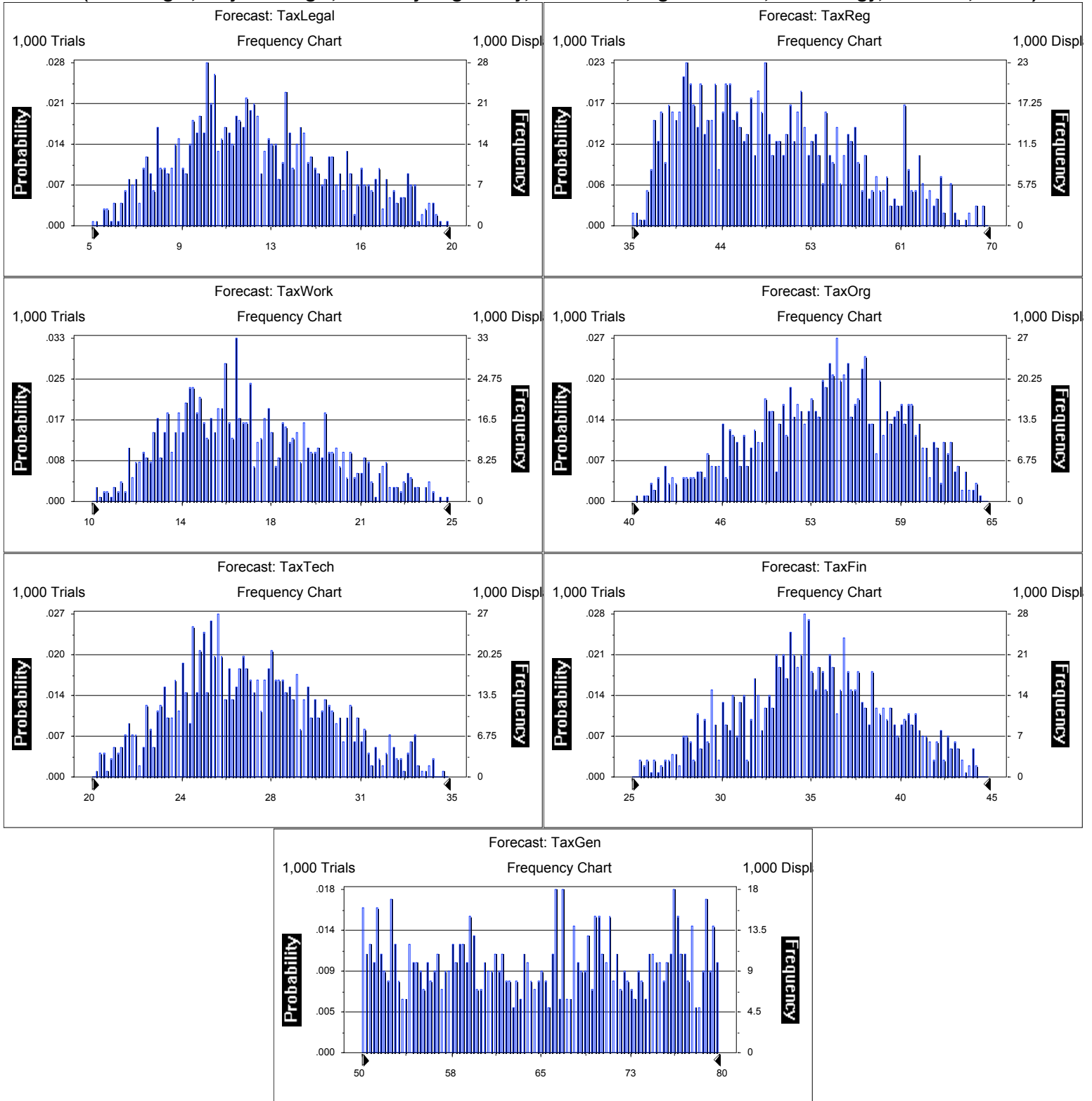
Simulation Results for Each Component

(Left to right, they are: Legal, Statutory/Regulatory, Workforce, Organizational, Technology, Financial, Model)



Tax Collection Complexity and Time Commitment Analysis Simulation Results for Each Component

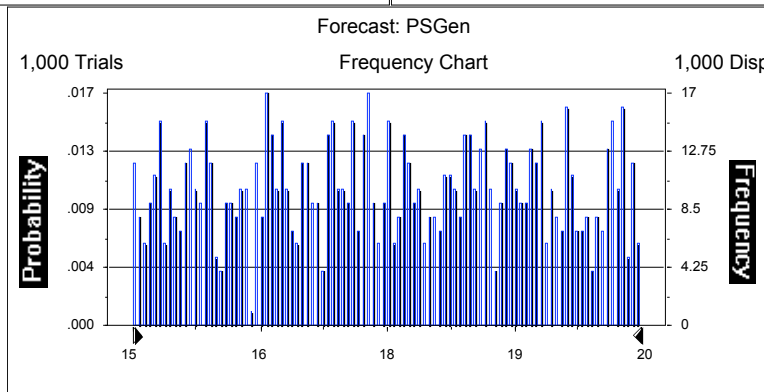
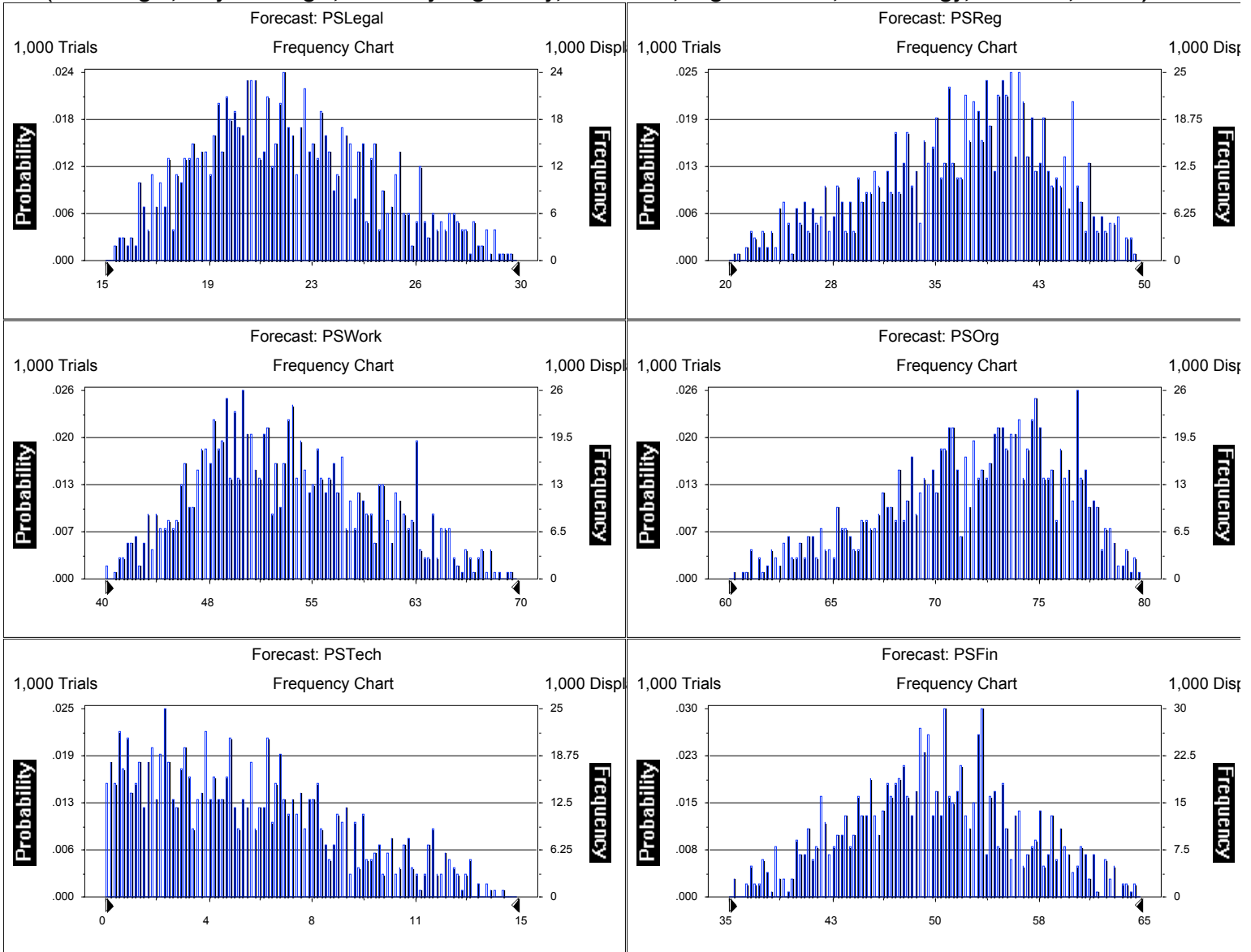
(Left to right, they are: Legal, Statutory/Regulatory, Workforce, Organizational, Technology, Financial, Model)



Public Safety Complexity and Time Commitment Analysis

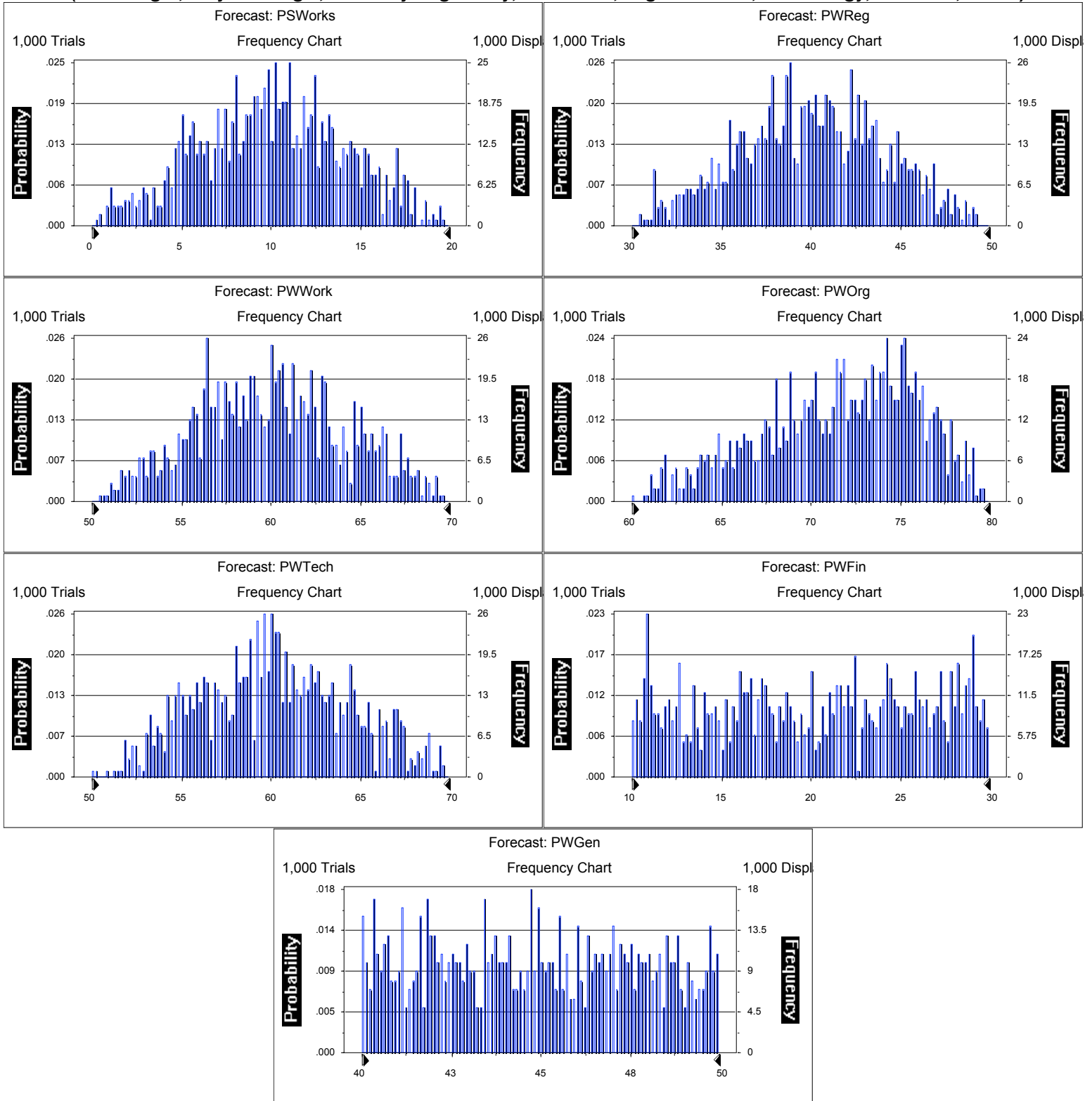
Simulation Results for Each Component

(Left to right, they are: Legal, Statutory/Regulatory, Workforce, Organizational, Technology, Financial, Model)



Public Works Complexity and Time Commitment Analysis Simulation Results for Each Component

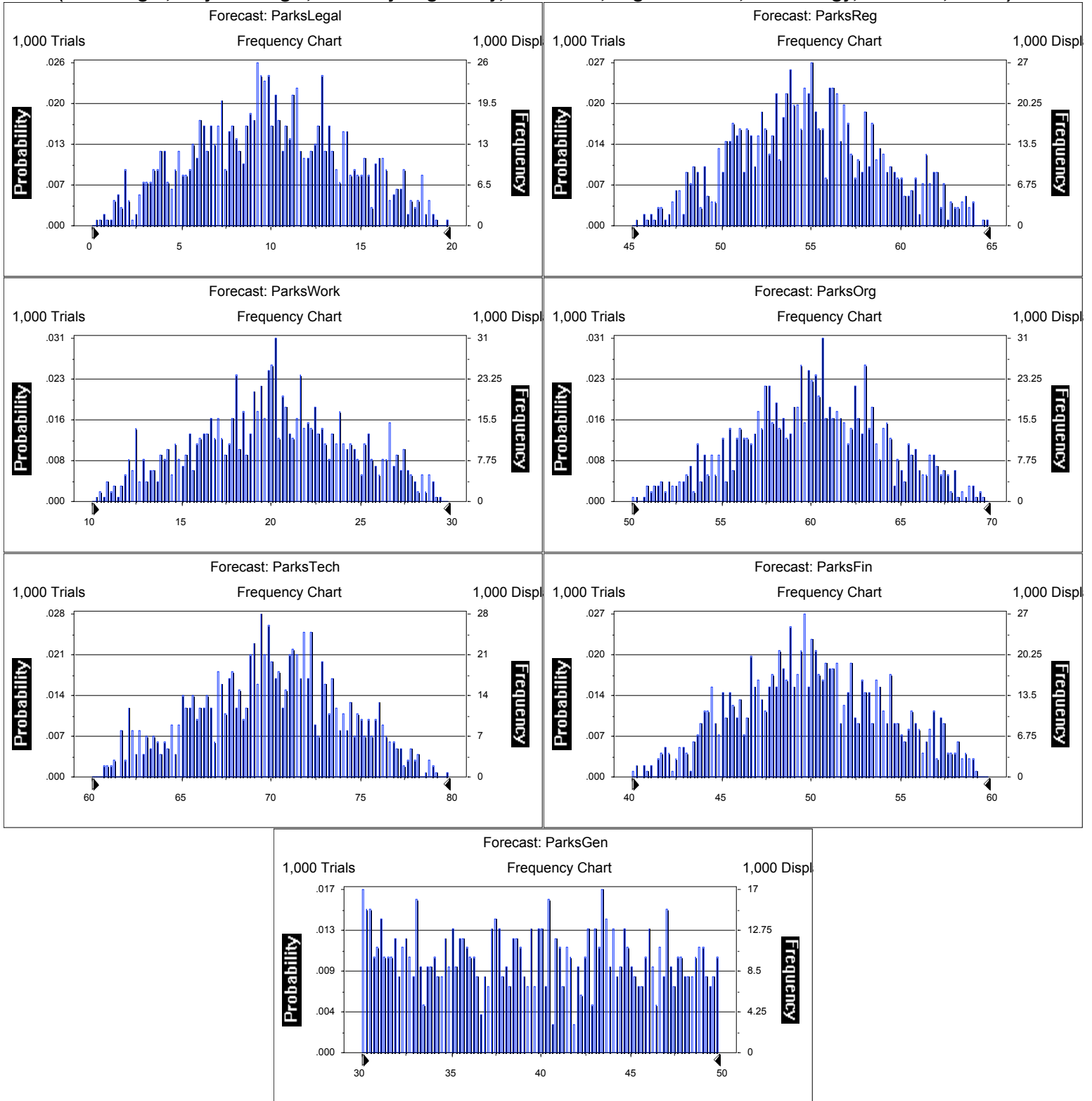
(Left to right, they are: Legal, Statutory/Regulatory, Workforce, Organizational, Technology, Financial, Model)



Parks and Recreation Complexity and Time Commitment Analysis

Simulation Results for Each Component

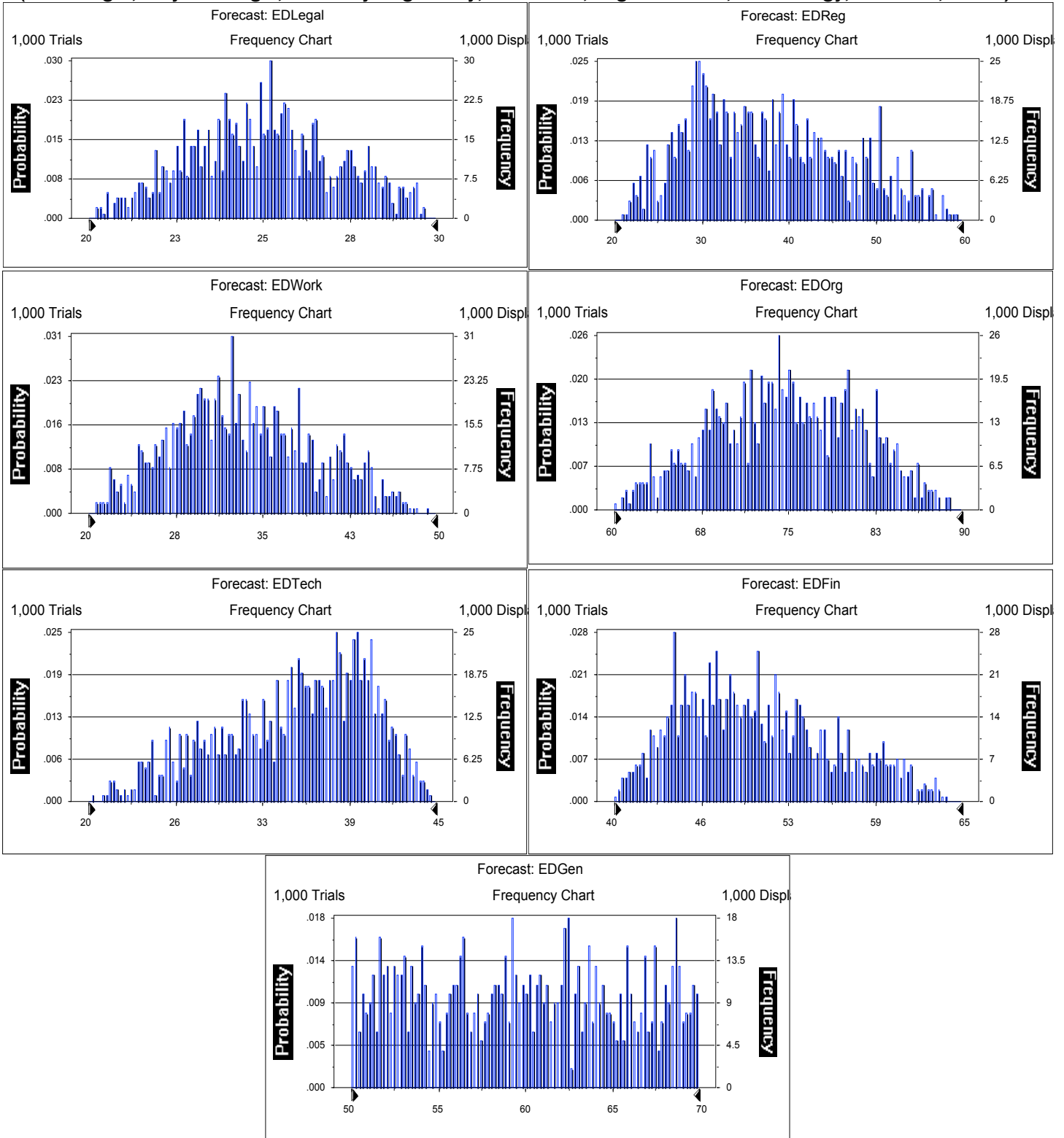
(Left to right, they are: Legal, Statutory/Regulatory, Workforce, Organizational, Technology, Financial, Model)



Economic Development Complexity and Time Commitment Analysis

Simulation Results for Each Component

(Left to right, they are: Legal, Statutory/Regulatory, Workforce, Organizational, Technology, Financial, Model)



APPENDIX C

LIST OF EXPERT INTERVIEWS

Adams, Mark - Assistant Director, Department of Finance, City of Pittsburgh
Baechle, Andy – Director of Parks and Recreation, Allegheny County
Baum, Thomas - Lancaster Tax Collection Bureau
Billotte, Ray - Administrator of Courts District Court of Pennsylvania
Costa, Guy – Director of Public Works, City of Pittsburgh
Davin, Dennis – Director of Economic Development Department, Allegheny County
DeLoughry, Catherine - Pennsylvania Economy League
Dettore, Jerry – Deputy Director, Urban Redevelopment Authority, City of Pittsburgh
Donahoe, David, Director of Regional Asset District, Allegheny County
Donatelli, Tom – Director of Public Works, Allegheny County
Duane, Ashley – Director of Parks and Recreation, City of Pittsburgh
Fees, Richard – Treasurer, City of Pittsburgh
Foerster, Joanne – CitiStat Project Manager, City of Pittsburgh, Office of the Mayor
Full, Robert - Director, Emergency Management County of Allegheny
Gable, Mike – Assistant Director of Public Works, City of Pittsburgh
Gambino, Dominik – President, Diversified Municipal Services
Hopson, Clarence – Assistant Director of Parks and Recreation, City of Pittsburgh
Janoscko, George – Solicitor, Allegheny County
Jensen, Brian K., Ph.D. – Project Manager, Pennsylvania Economy League
Johnston, MaryLou – Assistant Director, Department of Finance, City of Pittsburgh
Kaye, Robin – Consultant, Pittsburgh Parks Conservancy
Kennedy, Robert – Director of Operations and Director of Public Safety, City of Pittsburgh
Klinginsmith, Jim – Executive Vice President, Allegheny County Labor Council
Madsen, Per – Chief Information Officer, Allegheny County
Marshall, Tim – Consultant, Pittsburgh Parks Conservancy
McCullough, Charles – Attorney, Tucker & Arensberg
McNeilly, Robert - Chief of Police, City of Pittsburgh
Miller, David - Associate Dean and Professor Public and Urban Affairs, University of Pittsburgh
Ogden, Tom - Chief of Police, Mt. Lebanon Municipality
Peduto, Bill – Councilmember, City of Pittsburgh
Roddey, James – Former Chief Executive, Allegheny County
Radley, Mike – Assistant of Director of Parks and Recreation Department, City of Pittsburgh
Stephens, David – Chief Information Officer, City of Pittsburgh
Stern, Howard – Deputy Director, City Information Systems, City of Pittsburgh
Taylor, Damon – School Board Accountant, City of Pittsburgh
Troy, Dennis – Former Deputy Director of Economic Development, Allegheny County
Waters, Charles – Pennsylvania Economy League
Weinstien, John – Treasurer, Allegheny County
Weir, Michael – Senior Fellow, Pennsylvania Economy League
Zapinsky, Ken – Vice President, Pennsylvania Economy League