LCVMPO Transit Regionalization Recommendations

May 2016
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1 INTRODUCTION

The public transportation providers in the Lewis Clark Valley continue to explore strategies to efficiently deploy their limited financial resources while improving the products they provide to their customers. These are common goals in the transit industry and a number of agencies working in multi-provider regions have undertaken various levels of organizational regionalization to control costs and improve customer satisfaction.

This memorandum explores viable regionalization strategies for the Lewiston Transit System (LTS) and the Asotin County Public Transportation Benefit Area (PTBA). It builds upon findings from an existing conditions analysis conducted for this study and research into lessons learned from other agencies who have implemented aspects of regionalization.

2 REGIONALIZATION IN TRANSIT

Numerous transit agencies across the country have either explored or implemented steps toward the regionalization of their organization and/or operations. Cost control is often the primary factor behind these decisions. The provision of regional transit service by multiple agencies tends to duplicate functions, leading to inefficiencies when comparing the investments in staff, capital infrastructure, and technology relative to the combined need for these expenditures. Improved customer service is another reason taken into account when considering the integration of functions. Disparate branding and marketing, unbalanced technology amenities, and uncoordinated service planning can all make for a confusing or inconvenient experience when taking transit for regional travel.

Regionalization involves the integrating of functions among multiple transit agencies. The level of integration can range from simple communications around common issues to full consolidation of all functions into a single entity as depicted in Figure 1.
The spectrum of integration strategies includes:

- **Communication**
  - Joint technical/advisory committees
  - Coordinating councils

- **Coordination**
  - Joint bus/equipment purchases
  - Coordinated service schedules
  - Joint training
  - Joint marketing/rider information
  - Regional planning
  - Shared service standards and guidelines

- **Collaboration**
  - Joint maintenance
  - Region fare structure/policy
  - Jointly funded/operated service
  - Central call/dispatch centers
  - Shared technologies
  - Shared passenger facilities
  - Shared fleet
  - Shared administrative services
  - Unified brand

- **Consolidation**
  - Combined operations, administration, and maintenance
  - Unified governing body
Regionalization efforts above and beyond basic coordination tend to focus on the consolidation of operations or operations contracting. Addressing the various aspects of transit operations often entails a number of job functions that may only be economical when distributed over a larger system. Similarly those agencies that contract for service may be in a poor position with respect to contract negotiations when responsible for a smaller system. Consolidating operations for multiple areas within a region can bring about greater efficiencies when directly operating service, or greater cost and quality control when contracting for service. Valley Metro in the Phoenix area and KCATA in the Kansas City area highlight recent operations consolidation efforts and these are detailed in Appendix A.

Valley Metro and KCATA also highlight an expanding role seen for some regional authorities. Historically regional authorities were chartered with providing connecting, regional service between local jurisdictions while local agencies provided non-regional service within the individual jurisdictions. Many had a unique and dedicated revenue source for the regional service – often the case for those providing rail service. Over time more authorities are taking on regional planning efforts, unifying multiple brands in the region, and/or consolidating local operations. As seen in the Appendix A case studies, this often involves a cost sharing agreement between the regional authority and the local jurisdictions, which retain their policy-level responsibilities.

The consolidation of administrative functions is less common. The Phoenix area also provides an example of the savings when consolidating the administration of two organizations. In this case it was the consolidation of the bus-focused Regional Public Transportation Authority (RPTA) and the rail-focused Valley Metro Rail (VMR) administration. It should be noted that the RPTA and VMR policy boards have remained in place, maintaining their financial and policy responsibilities over the services they are chartered to provide.

The complete consolidation of regional services and policy decisions is even less common. This may be the case with the formation of a new regional authority or transportation district chartered to provide all public transportation in its service area. These typically have a policy board representing all jurisdictions in the service area. They operate via a dedicated revenue source covering the affected jurisdictions or with the individual municipalities that buy service from the regional entity.

Many of the bi-state integration examples involve either a regional authority charted to provide bi-state regional service or a primary transit agency in one of the two states operating in the other. In these cases that agency will provide service between the two states typically independent of local service in one or both states.

Figure 2 highlights examples of the various levels of integration in the industry. As each region is unique, the tactics employed, and the results strived for vary.
## Figure 2  Sample Integration Efforts in the Transit Industry

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<th>Name</th>
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<th>Purpose</th>
<th>Activities</th>
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</table>
| Butte County B-Line           | Butte County, CA                                                        | Study conducted that explored potential consolidation and coordination opportunities. | ▪ Consolidated bus purchases  
▪ Consolidated transit providers  
▪ Contractual mergers of some agencies or functions  
▪ Development of unified brand (B-Line)  
▪ Elimination of duplicate services along main corridors  
▪ Regional planning  
▪ Single lead agency and policy board for transit operations | ▪ Resulted in cost savings  
▪ Improved service quality |
| Kansas City Area Transportation Authority | Cass, Clay, Jackson, and Platte Counties, MO and Johnson, Leavenworth, and Wyandotte Counties, KS | Consolidation of administrative/managerial functions for increased efficiencies and cost savings. | ▪ Shared contracts  
▪ Joint branding  
▪ Uniform regional fare  
▪ Route coordination  
▪ Regional planning | This coordination effort was recently completed and these outcomes have yet to be confirmed:  
▪ Increased efficiencies and service effectiveness  
▪ Consolidated administrative functions  
▪ Enhanced customer experience  
▪ Projected cost savings from personnel, consolidation of administrative functions, and contract management oversight  
▪ Integrated route and service planning  
▪ Shared contracts |
| MATBUS                        | Fargo, ND and Moorhead, MN                                               | Long time management of Fargo and Moorhead’s transit systems by the Fargo-Moorhead Council of Governments led to regional coordination efforts. | ▪ Joint marketing, branding, signage  
▪ Shared paratransit vehicle fleet  
▪ Unified governance  
▪ Joint staffing | ▪ Co-ownership of Metro office and transit garage is owned together  
▪ Reduced the staffing needs for training and supervision and share a larger workforce |
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| McAllen Central Station   | McAllen, TX                                   | Coordinated bus operations and service routes needed for new Central Station. | • Centralized transportation hub for multiple providers with high customer amenity  
• Coordinated service along main corridors  
• Regional planning | • Centralized transportation at a single location  
• Facilitated transfers between regional and international services to local bus routes  
• Provided economic development benefits for local retailers on Main Street |
| Northwest Transit Alliance| Columbia Clatsop, Tillamook, Lincoln, and Benton Counties, OR | Remove barriers to transit use though coordination of routes, schedules, and fare structures among five operators. | • Joint marketing, branding, signage  
• Shared transit stops  
• Coordinated transfers  
• Shared staff resources | • Improved service for customers  
• Improved efficiencies for transit agencies  
• Improved employer and employee attraction and retention  
• Improved access to businesses  
• Improved visitor experience  
• Reduced vehicle miles traveled with related reductions in greenhouse gas emissions and fossil fuel use  
• Increased ridership  
• Lowered fossil fuel use and carbon emissions Leveraged a unique funding opportunity to take action to meet identified needs |
| ORCA Universal Fare Card  | Central Puget Sound, WA                       | Consolidation of fare payment for seven transit providers.             | • Centralized fare revenue collection and distribution for regional passes  
• Regional planning  
• Unified regional fare medium  
• Unified regional fare policies and free transfers between operators | • Improved operating speed  
• Provided more accurate ridership data  
• Improved revenue data Improved regional revenue reconciliation |
## Transit Regionalization Study | Recommendations

**Lewis Clark Valley MPO**

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| **Quad Cities** | Davenport and Bettendorf, IA and Rock Island and Moline, IL | Tourism Bureau advocated for simplifying access to the riverfront area for tourists. | ▪ Universal fare card  
▪ Creation of a riverfront circulator to serve four city downtowns in two states  
▪ Local service provided independent from bi-state service  
▪ Linked the three transit systems with 10,000 passes sold annually  
▪ Established new service (the Loop), which has generated 34,000 annual riders |                                                                                                                                           |
| **Research Triangle** | Durham, Raleigh, Chapel Hill, and Cary, NC | Increased inter-jurisdictional commuting sparked regionalization. | ▪ Bus and Rail Investment Plan for two counties  
▪ Central call center for multiple providers  
▪ Coordinated service along main corridors  
▪ Contractual merger of one local service with regional service  
▪ Joint bus purchases  
▪ Joint marketing, branding, signage  
▪ Joint maintenance, shared facilities  
▪ Joint technical committees  
▪ Joint training  
▪ Joint usage of software for scheduling, vehicle location, passenger counts  
▪ Real-time information  
▪ Regional fare passes  
▪ Regional planning  
▪ Regionalization of paratransit service (partial)  
▪ Provided a more seamless transit system  
▪ Spent transit dollars more effectively  
▪ Improved the level of transit service  
▪ Increased customer boardings  
▪ Improved farebox recovery ratio  
▪ Decreased operating costs per rider  
▪ Reduced regional redundancy in maintenance functions for five years |                                                                                                                                           |
## Transit Regionalization Study | Recommendations

**Lewis Clark Valley MPO**

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| Valley Metro | Maricopa County, AZ       | Cost savings for administration of regional authority and rail authority, consolidation of contracted services in region, and unified branding across multiple providers | - Central call center for multiple providers  
- Development of a regional transit system  
- Development of unified brand (Valley Metro)  
- Development of service standards and guidelines  
- Integrated fare system  
- Integrated passenger information system  
- Regionalization of paratransit service  
- Consolidation of RPTA and Valley Metro administrations | - Developed a regional transit system  
- Developed unified brand (Valley Metro)  
- Integrated fare system  
- Integrated passenger information system  
- Created a regional call center  
- Saved over $2 million by eliminating redundancies in administration of regional organizations. |

3 OPPORTUNITIES FOR FURTHER COORDINATION IN THE LEWIS CLARK VALLEY

As highlighted in this study’s Existing Conditions memorandum, the Asotin County PTBA, City of Lewiston, and the Lewis Clark Valley MPO have undertaken a number of coordination/collaboration activities to improve public transportation in the region. These include:

- PTBA contracting with LTS for demand response scheduling and dispatch
- Joint route map and Ride the Valley website funded by the MPO
- Mutual maintenance of Ride the Valley website and rider information
- Fare reciprocity allowing free transfers between systems
- Agencies aligning holidays for consistent service days
- Partnering on promotional ideas (e.g. Veterans ride free, Kids Freedom Pass)
- Coordinated planning via studies sponsored by the MPO

These place the region pretty far along the continuum of integration activities. At the same time the region has needs for additional service and continued cost control.

STAKEHOLDER FEEDBACK

Discussion with staff and policy makers in the region highlighted a number of community goals/visions for transit in the region. These include:

- Weekend (particularly on Saturday and for shopping trips) service
- Later evening service
- Improved level of service (higher frequency of service/less wait times for transfers)
- Shorter travel times on bus
- Larger service area (survey respondents seeking additional stops)
- Maintenance of bi-state travel for work, shopping, and medical trips (daily and weekends, Asotin County demographics show tendency to support longer travel to seek value when shopping)
- Improved and increased number of passenger amenities at stops (shelters, benches, lighting)

The group expressed the following desires and concerns with respect to regionalization:

- Desired benefits
Transit Regionalization Study | Recommendations
Lewis Clark Valley MPO

- Maintenance of a larger pool of drivers and maximization of vehicle utilization on a regional basis (efficiencies with respect to backup driver and vehicle needs—for both fixed route and demand response—and ability to economically respond to random peak demand-response needs)
- Ability to maximize regional FTA grant monies currently allocated to City of Lewiston
- Minimization of reporting requirements
- Ability to leverage more partnerships with companies and institutions
- Coordination of agency policies
- Provide bus storage capacity as fleets grow

• Concerns
  - Local control of locally raised transit revenues (both in reality and for public perception)
  - Local inputs on service planning
  - Lost jobs
  - Retention of Washington State Transit Insurance Pool (WSTIP) funding and access to state transit grants
  - Retention of ability to work with local jurisdictions on transit supportive infrastructure investments and resulting matching funds generated
  - Impact if City of Lewiston in-kind match is lost

STAFF ROLES AND INCREASING OPPORTUNITIES FOR EFFICIENCY IMPROVEMENTS

The desires for cost savings (and their reinvestment in service) would stem from reductions in duplication of staff and operations. Organizational structures vary across the transit industry. The number of staff positions in a transit agency or department depends on a number of factors including:

• System size
• Whether service is contracted or provided in-house
• The level of transit planning activities
• Range of non-transit services provided (including rideshare and other Transportation Demand Management (TDM) programs)
• Available budget
• Availability of resources in other departments

While the job titles and staff headcount may vary from provider to provider, the duties of staff involved are relatively constant from agency to agency. This is especially true for the management, administrative, and support functions involved and whether service is contracted out or not. For smaller agencies, support staff tend to wear many hats fulfilling functions that specialized staff perform in larger organizations, where certain functions require one or more full-time employees. Figure 3 on the following pages highlights the job classifications typically employed in transit agencies. The “prevalence” classification indicates the degree to which transit agency organizations include that job classification (i.e. those rated high are found at most
agencies while those rated low are less frequently incorporated). More importantly, the table calls out the major roles for these staff positions noting that while having someone fulfill a job title may not be mandatory, someone in the organization, or at a contracted provider, must be performing the specified duties. For each position, the degree to which rural and small urban providers maintain staff under these titles is noted, as well as whether the specific titles are associated with an agency’s charter authority, organizational history, and/or local and regional norms.

The Lewis Clark Valley transit system should grow over time to address increasing needs and expanding markets for transit service. At the same time the organizations providing transit will likely mature in response to the demand for additional services, to follow industry best practices, and to comply with current and future regulations. Today the City of Lewiston and the PTBA transit organizations include some dedicated job classifications listed as a “Medium” prevalence in the table, but it is expected that they will have take on more of the “Medium” and “Low” job classifications in response to this growth, increasing the likelihood of inefficiencies due to parallel organizational structures will increase.

1 Typical job classifications and their prevailing use is based on experiences within the industry and data collected on research into compensation levels (TCRP Report 127: Employee Compensation Guidelines for Transit Providers in Rural and Small Urban Areas)
Figure 3  Typical Transit Industry Job Classifications

<table>
<thead>
<tr>
<th>Titles &amp; Alternate Names</th>
<th>Duties</th>
<th>Prevalence</th>
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| Transit Director (Executive Director, General Manager, Transit Administrator, Transit Systems Manager, Transit Superintendent) | • Manage financial activities to support transit operations, quality, productivity, and goal attainment.  
• Provide fiscal and management control, including budget development and administration.  
• Manage transit system procurements, cash, and investments.  
• Transit system staff oversight.  
• Develop policies and procedures in support of operations and administration.  
• Assure regulatory compliance.  
• Guide agency’s strategic planning. | High |
| Administrative Assistant (Office Manager, Assistant to the Director, Deputy Director) | • Manage communications to/from Director’s office.  
• Respond to requests for information.  
• Organize Director’s activities. | Medium |
| Transit Planner | • Conduct analysis of local transit services.  
• Identify opportunities for new services and service changes.  
• Prepare planning documents for public and governmental review.  
• Conduct community outreach forums for discussion of transit issues. | Low |
| Finance Manager (Administration Manager, Chief Financial Officer, Finance Clerk Bookkeeper, Transit Clerk, Payroll Clerk, Accounting Clerk/Assistant, Grants Manager) | • Process payroll for all employees, including garnishments, taxes, and relevant fare deductions on bi-weekly basis to ensure that all employees are paid accurately for their working hours.  
• Complete daily and weekly reports for Operations/General Manager review to ensure that hours and payroll are within budgeted amounts for service provided.  
• Maintain accurate fare accounting records and relevant payroll deductions for affected employees.  
• Update and maintain vendor and supplier files.  
• Ensure ample stores of necessary items, including office supplies and computer equipment.  
• Administration of grants (application, data reporting).  
• Manage Human Resources functions. | Medium |
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<tr>
<th>Titles &amp; Alternate Names</th>
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<th>Prevalence</th>
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<tbody>
<tr>
<td>Marketing Specialist (Communications Specialist)</td>
<td>▪ Conduct public outreach in conjunction with planners and managers.&lt;br&gt;▪ Develop new marketing concepts to encourage transit ridership.&lt;br&gt;▪ Prepare press releases and maintain media relations.&lt;br&gt;▪ Conduct community education.&lt;br&gt;▪ Develop and maintain agency website and social media.</td>
<td>Low</td>
</tr>
<tr>
<td>Computer Operations Analyst (Information Technology, Technical Services Manager)</td>
<td>▪ Maintain and update databases for scheduling programs.&lt;br&gt;▪ Provide training to staff on new programs/applications.&lt;br&gt;▪ Maintain computer aided dispatch/scheduling, fare collection, automated passenger count, automated vehicle location, etc systems.&lt;br&gt;▪ Conduct special projects and advise on technology solutions.</td>
<td>Low</td>
</tr>
<tr>
<td>Safety and Training Manager</td>
<td>▪ Manage new hire and veteran operator training programs to ensure that all operators receive the minimum initial training and that all employees receive required annual and ongoing training.&lt;br&gt;▪ Provide and/or manage classroom and behind-the-wheel instruction according to corporate and client specifications in all aspects of vehicle operation in the course of passenger transportation, including defensive driving; service area familiarization; passenger loading, unloading, and securement; proper manifest documentation; use of on-board equipment; accident and emergency procedures; dispatch and radio communications; and passenger sensitivity.&lt;br&gt;▪ Review all vehicular, passenger, and employee accidents/incidents for determination of cause and preventability. Identify potential trends to be addressed in future training efforts as well as ensuring that retraining and safety points are assessed according to company policy.</td>
<td>Low</td>
</tr>
<tr>
<td>Trainer</td>
<td>▪ Assist in initial screening of new hire candidates to ensure that client and corporate qualifications are met and that training efforts meet the staffing needs of the project.&lt;br&gt;▪ Provide classroom instruction according to corporate and client specifications in all aspects of vehicle operation in the course of passenger transportation, including defensive driving; service area familiarization; passenger loading, unloading and securement; proper manifest documentation; use of on-board equipment; accident and emergency procedures; dispatch and radio communications; and passenger sensitivity.&lt;br&gt;▪ Provide monthly or annual ongoing/refresher training in topics relevant to the service and service area in a timely manner.</td>
<td>Low</td>
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<td>Titles &amp; Alternate Names</td>
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| Administrative/Clerical Support (Clerk) | • Maintain computer and paper records.  
• Support customer relations and marketing activities.  
• Support data collection and reporting activities.  
• Support fare collection activities.  
• Support fare sales activities. | Medium |
| Operations Supervisor (Operations Administrator, Route coordinator) | • Maintain or manage attendance records for vehicle operators and back-up drivers; ensure that the attendance policy is enforced and monitored daily.  
• Develop staff and operator schedules fairly, in consideration of seniority, according to client demands/requirements and adhering to budget.  
• Responsible for positive employee morale and quality customer service.  
• Prepare, verify, and review staff schedules and work records for payroll purposes.  
• Assign work duties to qualified employees to ensure adequate coverage of all supervisory shifts and assigned routes.  
• Ensure that individual customer/passenger concerns are responded to in a manner that includes investigation and follow-up as concerns apply to specific employees.  
• Assist in recruiting, selecting, and training new operator and staff employees.  
• Conduct performance reviews for all operations staff at least annually; monitor vehicle operator performance by spot-checking routes and times of various routes.  
• Assure that fare revenue is properly accounted for and currency/fare media is securely processed. | Medium |
| Road Supervisor | • Conduct site checks and road observations according to local policies and procedures. Document findings accordingly and provide necessary reports to project staff.  
• Monitor street operations for on-time performance and schedule and route adherence.  
• Accompany operators to medical facilities as required after accident or injury; ensure proper administration of post-accident drug and alcohol testing.  
• Identify potential rerouting required as a result of traffic, construction, or accident situations.  
• Assist operators with service or passenger problems. | Low |
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| Dispatcher                    | • Assign work, vehicles, and on-board equipment to operators and maintain check-out logs.  
                                 | • Assign stand-by or extra board operators in the event of operator absences or increased service volumes, or to minimize service disruptions as a result of traffic, vehicle malfunctions, operator problems, and/or emergency situations.  
                                 | • Monitor operators and trip status, making adjustments and reassignments as necessary to ensure on-time performance.  
                                 | • Reschedule trips as necessary in the event of vehicle malfunction, traffic, or emergency situations.  
                                 | • Open and/or close facility depending on work shift.                                                                                                                   | Medium     |
| Fleet Maintenance Manager     | • Coordinate and direct the repair and maintenance of company-operated equipment and vehicles.  
                                 | • Determine work procedures, prepare work schedules, and expedite workflow accordingly.  
                                 | • Train and/or assist maintenance staff on vehicle repairs to ensure maximum fleet availability and maximum cost benefit.  
                                 | • Ensure all Occupational Safety and Health Administration (OSHA) rules and regulations are at all times adhered to, including the “Employee’s Right to Know” program. | Low        |
| Maintenance Clerk             | • Maintain records of parts purchases and uses.  
                                 | • Maintain vehicle maintenance files.  
                                 | • Prepare regular mileage reports.                                                                                                                                   | Low        |
| Mechanic                      | • Ensure that all vehicle condition reports are accurate and properly addressed.  
                                 | • Maintain all maintenance records, i.e., work orders, in an “inspection ready” status at all times; ensure repair orders are neat and accurate.  
                                 | • Track all repairs in progress to ensure the timely and correct repair of vehicles for return to operations; know the maintenance status of all assigned vehicles at all times.  
                                 | • Perform regular preventive maintenance on company vehicles.  
<pre><code>                             | • Work with operations staff on resolving road calls.                                                                                                                   | Medium     |
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<th>Titles &amp; Alternate Names</th>
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| **Maintenance Utility Worker** | - Ensure that all vehicles are cleaned and fueled, with fluids topped, and ready for service at various times of day.  
- Maintain accurate and up-to-date fuel logs for each vehicle and type of fuel/fluid.  
- Clean vehicle interiors and exteriors according to standard.  
- Assist shop staff as necessary in keeping parts inventories accounted for as well as in procuring necessary parts for fleet and facility maintenance.  
- Keep the lot maintained and clean, including removal of trash and debris, sweeping, snow shoveling, grass cutting and weeding, and trimming when necessary.  
- Perform minor vehicle repairs requiring small articulate hand movements (such as light bulb replacement and adding fluids). | Low |
| **Customer Service Agent (Community Relations Coordinator, Community Outreach Coordinator)** | - Communicate regularly with client staff to ensure customer service efforts meet the demands of the contract and the client.  
- Establish relationships with key consumer agencies to facilitate direct communication and feedback as well as a proactive customer focus.  
- Respond to individual customer/passenger concerns in a manner that includes investigation and follow-up as concerns apply to specific employees.  
- Provide findings and resolution information to operations management for follow-up and possible reward and/or disciplinary action.  
- Maintain database or log of customer complaints/compliments that can readily identify trends that may require additional training or management consideration.  
- Supply system information, including eligibility, service area, fares, and system use to all interested parties.  
- Attend various public events as a representative of the program to provide information and feedback on general concerns/items of discussion.  
- Process consumer applications to determine eligibility according to client guidelines and maintain database of eligible passengers.  
- Provide resource information as necessary for interested parties on the transportation system as a whole, and referrals to appropriate agencies for transportation assistance.  
- Manage lost and found articles and attempt to locate appropriate owners of items left on board vehicles.  
- Support marketing campaigns.  
- Fare media sales and customer ID processing. | Medium |
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<tr>
<td>ADA Coordinator (Paratransit Planner)</td>
<td>▪ Assure ADA compliance (fleet, public infrastructure, polices &amp; practices).&lt;br&gt;▪ Administer ADA paratransit eligibility program.&lt;br&gt;▪ Maintain database of eligible riders.&lt;br&gt;▪ Support training activities and maintenance of ADA paratransit rider information.</td>
<td>Low</td>
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Source: TCRP Report 127: Employee Compensation Guidelines for Transit Providers in Rural and Small Urban Areas
CONSOLIDATION STRATEGIES

This section offers two strategies for consolidating aspects of transit provision in the Lewis Clark Valley. The first focuses on transit operation and the second further integrates administrative functions. In both cases the PTBA and City of Lewiston remain in place as local policy boards and an agreement between the policy boards to formalize the integration of agency functionality is required. This may range from a contract for services (as done today for the sharing of demand-response trip scheduling) to intergovernmental agreements. The latter is likely required when sharing resources (including staff and capital assets) or sharing responsibilities (e.g. shared service design planning).

Intergovernmental Agreements (IGAs) are currently employed to establish joint or cooperative actions between Washington and Idaho governmental bodies. Laws in each state facilitate the development of these agreements² and recent examples include:

- **LCVMPO** – City of Clarkston, WA, City of Asotin, WA, Asotin, County, WA, City of Lewiston, ID, and Nez Perce County, ID
- **Regional Airport Operating Agreement** – Pullman, WA and Moscow, ID
- **E911 Services and Complete Dispatch** – Moscow, ID, Pullman, WA, Whitman County, and Washington State University Agreement
- **Quad-City Drug Task Force** – Nez Perce County, ID, Latah County, ID; Whitman County, WA, Asotin County, WA, Washington County, ID, Garfield County, WA; Nez Perce Tribe; City of Moscow, ID; City of Clarkston, WA, City of Pullman, WA, City of Colfax, WA; Washington State University; and Washington State Patrol
- **Lewiston Nez Perce County Airport Authority** – City of Lewiston, ID and Nez Perce County, ID

Consolidation of Operations

The consolidation of operations places the responsibility for delivering transit service under one organization. This can be a new organization created for this purpose, or under one of the existing organizations. The latter would be the case if the consolidation of administrative functions is not pursued and would look like the current agreement for LTS to provide demand response scheduling and dispatch services for the PTBA.

In both cases one or both organizations will need to transfer physical assets and personnel staff to another organization. The transferring of assets will require a valuation of equipment, rolling stock, and facilities with an equitable exchange for financial tracking purposes.

The option to consolidate operations with a contracted service provider still exists, but the combined size of the regional system and the limited availability of competition among contracted service providers suggests that the consolidated operations should be in-house under a regional authority for the foreseeable future. As the combined system grows, contracted providers may become interested in providing their services on an economical basis. If this situation arises, the

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² Code section in support of joint powers agreements include: I.C. 21-401, 67-2326 through 67-2333, 67-2337, 67-2338, and 67-4002; and RCW 14.08 and 39.34. Additionally RC 36.57A addresses the powers of a PTBA.
cooperative agreement between the PTBA and the City of Lewiston would become one for contract management, as opposed to one for the operation of the combined service.

When only consolidating operations, the responsibility for service design, financial reporting, grant administration, etc., would remain with the PTBA and City of Lewiston. As done with contracts for service, the two policy boards can specify any desired safety, quality and performance objectives for operations in the cooperative agreement with the regional entity providing the service.

The fixed-route and demand-response operations should be physically housed together to maximize efficiencies with respect to staffing and supporting equipment/technologies. This allows the sharing of responsibility across staff (both drivers and operations support) where appropriate. If administrative consolidation is pursued, operations and administration should be cited together where feasible.

The consolidation of operations should attain the following benefits while acknowledging the identified concerns:

**Benefits**

- **Staffing costs.** On paper there is redundancy between the Operation Supervisor and Operations Manager positions given the current size of the combined system. Currently these positions involve additional duties (e.g. supporting the Transit Manager) and any final reorganization will need to make sure these non-operations duties are properly allocated to another position. In all likelihood, operations consolidation will avoid the need to add new staff to oversee operation as the services grow, as opposed to immediately reducing operation supervision staff. For example the addition of evening or weekend service typically necessitates the need to increase operations management staff by some incremental level. With a consolidated organization, these additional tasks could be shared among existing staff by designing the appropriate classifications and shifts.

- **Operating efficiencies.** Today each agency needs to provide backup vehicles and drivers to address mechanical failures, sick operators, and/or spikes in demand for demand-response service. For a small system the staff and equipment kept as active backups represent a large percent of those needed to maintain typical operation and often go unutilized when looking at combined regional needs. Combining operations allows a single backup set to cover the entire region.

- **Leverage when purchasing.** Today each agency arranges for a variety of supporting services and purchases needed supplies. A combined organization should get better rates for services and supplies as it would be negotiating for larger quantities.

- **Unified brand to public.** Operating a single fleet with drivers from a common pool will aid in presenting a unified brand to the public. A single set of passenger policies will avoid confusion in a region where the public does not see the river as a boundary.

**Concerns**

- **Job loss and cultural concerns.** Successful consolidation requires the buy-in and support of the overall organization. Cost saving from the elimination of redundancy inherently implies that some jobs will be eliminated. This often creates resistance from those in roles under scrutiny and from co-workers and policy makers. Staff often have allegiances to their current organizations and do not embrace changes requiring them to
work with “competing” organizations. These concerns should not deter the advancement of consolidation efforts, but care needs to be taken when communicating goals, next steps, and what the resulting organization will look like in terms of staffing and work environment. Agencies participating consolidation have worked to place workers somewhere in one of the affiliated organizations or used attrition to avoid worker displacements.

- **Cost allocation.** The costs for providing service will need to be shared by the PTBA and the City of Lewiston. The cooperative agreement will have to spell out how this is done. Similar cost sharing approaches are based on the number of revenue hours or miles expended in each community or based on an agreed upon formula taking into account populations served, prior year ridership, etc. There is no single and correct framework but the two policy boards will need to find common ground on a fair and equitable approach.

- **Reporting needs.** While the overall set of reporting needs should be reduced (i.e. will not have two organizations preparing FTA datasets), the consolidated organization will have to report out to two policy boards and the two states, as required, in addition to the FTA. The reporting demands for the policy boards can be managed by presenting a common set of data to each, while addressing any unique financial tracking needs.

- **Asset transfers.** The task of valuating and transferring assets will not be easy but is a one-time effort and should be manageable. The transferring of asset purchased with FTA funds may require additional attention but should not present a barrier to consolidation since they should remain in use and kept in the region.

**Consolidation of Administration**

The consolidation of administrative functions brings about the need to identify a new organizational entity to oversee all aspects of transit service provision for the entire region. As with the consolidation of operations, the PTBA or City of Lewiston could contract with the other for the combined set of administering and delivering transit service in their part of the region. Since the administration of transit entails border functionality (including service design, marketing, policy execution, etc.), an entity with a comprehensive regional focus should be considered.

The need for support functions (legal counsel, information technology, human resources, and payroll etc.) should be considered when determining how to establish a dedicated entity to administer transit. LTS currently benefits from direct access to City of Lewiston agencies, and the PTBA has some arms-length relationships with Asotin County. When looking at future options, the Lewis Clark Valley MPO presents a model of an independent legal entity that contractually accesses staff time and support from member organizations.

The MPO also provides a mechanism for engaging members from the PTBA and City of Lewiston Council on transit matters. While the MPO’s charter may not currently support a direct role in the administration of transit service, this should be explored. Conversely the establishment of a new authority under Washington or Idaho law should be considered. The PTBA and City of Lewiston would then enter into agreements with this new entity and the two states (as they are responsible for administering the FTA grant programs for the Lewis Clark Valley urbanized area) would allocate all FTA funds to this entity as a single “direct recipient” for the region.
As highlighted earlier, administrative staff should be physically located near operations staff to facilitate the management of operations and allow the blending of job functions between administration and operations. This may conflict with the goal of having the City of Lewiston house part of the organization to provide an in-kind match in lieu of rent/lease payments.

The consolidation of operations should attain the following benefits while acknowledging the identified concerns:

**Benefits**

- **Staffing costs.** The elimination of having redundant transit managers would result in savings as the combined system is of a size manager by one person with the appropriate support from others in the organization. The total workload for the combined system should be less as there will be no need to interface with the FTA in the name of two subsystems (i.e. only one set of reports, one triennial review, etc. will be required). This should offset the need for a single Transit Manager having to report out to the two policy boards.

- **Coordinated planning.** Having a single transit manager and a regional board will allow for planning of a single regional system. The two local policy boards will still have inputs on the planning process and be engaged in the development and acceptance of plans based on provisions of the cooperative agreements put in place. This is applicable to service design as well as to marking programs, fare policy, technology investments, rider policies etc.

- **Access to grant funds.** With consolidation all of the federal grant allocated to the region can be leveraged for transit operations. By pooling expenses (and their unique matching requirements) and employing the most appropriate budgeting strategy for the region, a consolidated agency can use federal funds most efficiently.

- **Leverage when partnering.** With single face representing transit in the region and speaking for a dedicated transit authority, it should be easier to engage potential regional partners. This will facilitate the expansion of transit pass programs, outreach and promotional activities, and sponsorship opportunities.

**Concerns**

- **Job loss and cultural concerns.** As with the consolidation of operations, consolidating administration will create concerns around losing jobs and organizational identity.

- **Reduced affiliations with local jurisdictions.** The consolidated administrative entity will have greater leverage when procuring services and supplies but some of these services may be currently available to LTS or the PTBA based on affiliations with local jurisdictions. The new entity will be more of a purchaser of services and some costs may increase. Similarly, the new entity will not be seen as an agency of the City of Lewiston and will have to follow permitting and approval processes for the development of transit supporting infrastructure, possibly increasing costs and time.

- **Asset transfers.** As with the consolidation of operations, consolidating administration will create the need to transfer staff and assets to new organizations. The nature and number of administrative assets will be less and the process to valuate and transfer these should be easier.
Recommendation

The region should strive for consolidation of operation and administration to maximize efficiencies in the planning and delivery of transit service in the region. Currently the combined transit service is relatively simple in design and operation and does not merit two independent organizational structures to administer and operate.

As described in the Recommended Action Items section it will take time to work out the details involved with consolidation and achieve buy in from the required parties. The change could be implemented in phases with operations consolidated into one of the existing organizations before setting up a new administrative body. This may be appropriate if the establishment of a regional authority or establishing full agreements with the policy boards is not feasible in the near term. It should be noted that the transferring of staff and assets is a large undertaking and it should not be taken twice in a short period of time. The next section details a number action items that are needed to advance the idea of consolidation operations and administration.

Conceptual Financial Impacts

This section provides a cursory analysis of how consolidation could impact the costs and revenues associated with the provision of transit services in the region. Figure 4 breaks out the primary expenses for the current PTBA and LTS operations, and estimates costs for a consolidated organization. The consolidated agency should realize savings on the order of $145,000. The savings are primarily attributable to:

- Single transit manager - reduced salary, benefits and payrolls taxes
- Reduced contracted services – as a single agency the need for contracted dispatch and scheduling is eliminated
- Utilities and Miscellaneous – as a combined agency, duplication of required supplies and services is reduced

<table>
<thead>
<tr>
<th>Expense</th>
<th>Current PTBA</th>
<th>Current LTS</th>
<th>Consolidated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Salaries</td>
<td>$161,000</td>
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<td>$210,066</td>
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<tr>
<td>Ops Salaries</td>
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<td>Retirement</td>
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<tr>
<td>Insurance</td>
<td>$144,733</td>
<td>$114,490</td>
<td>$263,324</td>
</tr>
<tr>
<td>Fuel</td>
<td>$65,000</td>
<td>$40,000</td>
<td>$105,000</td>
</tr>
<tr>
<td>Miscellaneous</td>
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<tr>
<td>Uniforms</td>
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<td>$600</td>
<td>$3,100</td>
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<tr>
<td>Vehicle Replacement Fund</td>
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<td>$10,720</td>
<td>$10,720</td>
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<tr>
<td>Maintenance</td>
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<td>$117,870</td>
</tr>
<tr>
<td>Contracted Services</td>
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<td>$29,320</td>
<td>$43,320</td>
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</table>
The consolidate agency will allow for greater leveraging of local funds when accessing federal operating assistance grants. Figure 5 highlights that even without the City of Lewiston’s soft match toward office space and services, the required level of local funding would be reduced by over $200,000 to deliver the current level of service. Under consolidation, the current level of local funding can in turn be applied toward additional regional services that benefit residents and businesses in both states.

### Figure 5 Conceptual Revenues under Consolidation

<table>
<thead>
<tr>
<th></th>
<th>PTBA</th>
<th>LTS</th>
<th>Current Region</th>
<th>Consolidated</th>
<th>Delta</th>
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<tr>
<td>Soft Match</td>
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<td>$632,304</td>
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<td>$(201,519)</td>
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<tr>
<td>Local</td>
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<td>$259,535</td>
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</table>

### 4 RECOMMENDED ACTION ITEMS

This section highlights the key action items needed to consolidate the current organization providing transit services. In addition to the logistics behind the change, it will be necessary to create an environment that fosters a successful evaluation and implementation of any desired changes. Identifying and facilitating a champion will be key to making this happen.

Research and lessons learned highlight the following themes for successfully processing organizational change:

- Having a clear and shared vision
- Understanding risk of failing to support change
- Collaborating and developing partnerships
- Maintaining stable and supportive leadership during transition
- Providing sufficient financial and human resources
- Developing an effective governance structure
- Recognizing that change may require realignment of agency authority
- Crafting reasonable expectations and timelines
- Tailoring change to local needs and capabilities

The following steps should help the Lewis Clark Valley plan for and execute organizational changes around the provision of transit service. It will take on the order of a year to complete the necessary investigations and draft the required agreements.

- **Resolutions to explore feasibility of consolidation.** The PTBA and City of Lewiston Council should be approached seeking resolutions in support of further exploration into the feasibility of organizational consolidation. The resolutions should acknowledge that staff time will be needed to properly detail the needed steps and develop frameworks for future agreements.

- **Concur with FTA and state DOTs.** The FTA should be engaged early on to receive concurrence on a general approach and get guidance on single recipient and grant management issues. Similarly the state DOTs and WSTIP should be consulted to fully understand any possible ramifications related to accessing services or grants.

- **Develop cooperative agreements.** The frameworks for intergovernmental agreements should be outlined early to establish consensus around consolidation. These should address cost sharing methodologies, policy-level controls, participation in planning processes, and quality control mechanisms. This may involve regular reporting on operations and financial performance and a working group of policy makers and staff to regularly review current performance, take possible remedial actions in response to current performance, and assure progress to longer range service strategies (as defined in regional plans). Draft agreement language can follow on after establishing proposed organizational and cost structures.

- **Valuate assets.** The assets of each agency need to be properly valued and their legal ownership determined as a precursor to planning any transfers to another organization.

- **Identify needed support functions.** A plan is needed to identify providers for support functions (legal counsel, payroll processing, information technology, financial analysis, etc) and the costs these will incur after reorganization.

- **Identify required facilities.** A plan is needed to identify where operations and administration will be physically housed. This should include proposed rents (or possible in-kind contributions) and utilities, capacity to house current and future staff, and capital assets.

- **Develop a staff transition plan.** A plan is needed to address how job classification would change with the reorganization and how wages and benefits may be impacted. New job classifications associated with the new organizational structure will be needed.

- **Identify policies requiring updates.** Current policies are limited to the ADA paratransit program, rider rules and responsibilities, and employee handbooks. These and any new policies will need to be formalized for the new organization.

- **Develop staff work plans.** The first months after reorganization will involve the establishment of numerous procedures and program development. Work plans should be used to prioritize and allocate appropriate time to these activities.
Appendix A  Valley Metro and KCATA Case Studies

Valley Metro: Phoenix Metropolitan Area, AZ

Purpose
Increase regional coordination on the contracting of transit services by local jurisdictions. And increase administrative efficiencies by eliminating redundancies via consolidation.

Background
In 1985 Maricopa county residents approved a half-cent regional sales tax that was dedicated to the Regional Public Transportation Authority (RPTA) for developing a regional transit plan, finding a dedicated funding source for regional transit service, and developing and operating a regional transit system. The RPTA Board of Directors adopted Valley Metro as the identity for the regional transit system in 1993.

In 2004, voters renewed an expiring county-wide half cent sales tax. One-third of the tax revenues over the next 20 years was to go towards public transportation. Revenues declined with the recession in 2007, leading to a 40 percent drop in the total projected 20-year funding provided by the tax. Cities were pressured to make decisions independently without a regional total transit network in mind.³

Connections between local systems throughout the Phoenix Metropolitan Area have become the responsibility of Valley Metro. Local efforts focused on coordination amongst the local providers in jurisdictions throughout the region. Historically the major cities within the Phoenix Metropolitan Area operated or contract for their own local transit service. Local coordination across jurisdictions has helped facilitate a unified system throughout the region from the customers prospective – all carrying the Valley Metro brand and being promoted at the regional level.

In addition to the regional bus network, rail transportation was introduced in the Phoenix metropolitan area. Rail became incorporated into the regional system but was governed by a separate entity - Valley Metro Rail (VMR). To function as a single agency, regional coordination has recently been enhanced through consolidation of the RPTA and Valley Metro Rail administrative organizations.⁴

Local Coordination

The local coordination efforts between jurisdictions included joint branding, a unified fare system, service standards and guidelines, and merged contracts.\(^5\)

Branding and Passenger Information

The RPTA transportation system was branded as Valley Metro in 1993. The goal of the regional brand was to remove visual distinctions between the various transportation services and simplify the system for riders. The look of transit services is consistent regionally and passengers are unaware of who operates the service when they board a bus. Additionally, passengers refer to the same webpage and same passenger schedules to get information about transit services.

Fare System

In addition to a regional brand, Valley Metro has a unified fare system. Fares are set regionally and are based on mode rather than who is operating or funding the service.

Service Standards and Guidelines

Valley Metro conducted a Service Efficiency and Effectiveness Study (SEES) in 2007 to develop performance and productivity standards and a framework for future service development. Valley Metro is currently in the process of developing Regional Transit Standards and Performance Measures to create more consistencies across service areas and better manage regionally funded transit services.\(^6\)

Contracts for Service

Most jurisdictions in the region contract for service. The RPTA has been working with many of the jurisdiction to manage service contracts for them. Valley Metro and the City of Tempe have recently developed a joint contract with First Transit for fixed route bus operations and maintenance services.\(^7\) This joint contract helps coordinate service delivery, reduce redundancies, and reduce expenses.\(^8\) As a result, the RPTA or the City of Phoenix administer contracts for service in 15 jurisdictions in the region.

Regional Coordination

The regional coordination efforts included consolidation of the managerial staff at RPTA and Valley Metro Rail.

Governance

The RPTA and Valley Metro Rail merged under a single CEO to better integrate bus and rail services, more closely coordinate service goals, and potentially reduce costs. In 2012 the Boards of Directors of RPTA and Valley Metro Rail (VMR) agreed to have one Chief Executive Officer and

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integrate the staffs of the two agencies into one. The two agencies continue to operate as separate fiscal entities, each with separate Board of Directors. This consolidation helps ensure unified board recommendations. A subcommittee, with equal representation from each board was also established to handle any conflicts between the governing boards.\(^9\)

This consolidations increased credibility for the agency as a whole and additional transparency for the public. Employees are able to expand their depth of expertise with new opportunities to work alongside and learn from fellow workers. Additionally, the single agency Actions and plans of a single agency are more easily tracked and transparent to the public. Consolidation resulted in a estimated savings of $2.1 million, or roughly 9 percent of the combined agency wages and benefits expenditures.\(^10\)

**Lessons Learned**

**Ensure Regional Equity**

The Valley Metro board created a “jurisdictional equity” formula to distribute service and regionally-generated funding to all partners across the region and establish a transparent methodology for sharing the cost of the service. Funding allocations are based on each jurisdictions contribution to the pool of regional funds.

**Prioritize the Customer Experience**

A regional fare system and a common branding scheme simplify passenger usability and understandability of the transit system.

**Set standards or guidelines with flexibility for local input and control**

Valley Metro manages and implements regional marketing campaigns to educate riders and promote transit use but allows individual municipalities to conduct their own marketing campaigns as needed. A similar approach for service design guidelines is proposed for future transit service development but has yet to be fully implemented.

**Use representative committees**

RPTA uses a committee structure to resolve conflicts between RPTA board and Valley Metro rail for branding, marketing, and fare structure.

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\(^9\) Ibid.

Johnson County Transit and Kansas City Area Transportation Authority

Purpose

In recent years there has been a renewed effort by regional leaders to focus on KCATA’s original mission of managing regional transit service in a unified, streamlined and efficient manner.

A study was conducted to consider the potential benefits assuming KCATA contractually absorbed JCT administration and management of JCT programs and services. The study team found opportunities for increased efficiencies and cost savings in several areas, most significantly in staffing.

Background

The Johnson County Transportation Council (JCTC), the Johnson County Board of County Commissioners (BOCC), and the Kansas City Area Transportation Authority (KCATA) joined in discussions regarding potential opportunities for greater integration and/or consolidation of operations and management. KCATA provides 65 bus routes along with bus rapid transit service, paratransit service, and a vanpool program. Johnson County Transit (JCT) provides commuter routes and non-ADA demand response service. Both contracted operations out to a third-party provider.

Outcomes

Staffing. KCATA entered into a cooperative agreement with JCT to provide management services for a fixed annual fee of approximately $475,000. The cost assumes that KCATA will contract for services and take on the administrative, financial and management functions that were previously completed by JCT staff. The costs are based on estimated staff time performing these duties. Johnson County Transit Employees that cannot find employment with KCATA will be offered other positions in Johnson County government. Budget and policy decisions regarding transit service in Johnson County will still remain the responsibility of the BOCC.

Services. KCATA and JCT both operate regionally, providing different types of service. KCATA services are characterized as a local service covering shorter distances and operating at relatively high frequencies throughout the day. JCT primarily operates express service on highways, with most routes operating only during peak hours.

There are opportunities to modify existing routes for streamlining service and providing a more seamless passenger experience. A Comprehensive Service Analysis (CSA) should be conducted to formally study opportunities for improved service. Current initiatives to support the customer experience include a regional co-rebranding of the KCATA and JCT fleet and services and a uniform regional fare

Contracting. Contract costs were reasonably similar for JCT and KCATA but there is potential to improve efficiencies in the delivery of contracted services through consolidation of contractor administrative functions. For example, it was determined JCT could utilize KCATA’s current fuel contract at a reduced cost. JCT now procures fuel through the KCATA’s fuel contract with Mansfield Oil Company.
Moving forward, JCT and KCATA staff will meet on a quarterly basis to evaluate contracting opportunities and facilitate joint procurement.

**Savings.** Ongoing savings to JCT were estimated to be between $450,000 and $510,000 annually. These savings are expected from staffing realignments and beneficial contract terms with service provider and other contracted services.