

**COMPETITIVE SERVICE DELIVERY**  
**A Proven Strategy That Should Be Boston's Next Initiative**

**November 2004**

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## Executive Summary

As the Mayor nears the end of his third term, he has indicated interest in pursuing new approaches to city operations. The Research Bureau believes that the first initiative the Mayor should embrace is the implementation of a true Competitive Service Delivery (CSD) program. CSD is a process that encourages both public employees and private companies to bid on the delivery of selected municipal services. Successfully implemented in other cities, CSD produces improved city services, cost savings over time and better prioritization of resources even when city employees win the bid. CSD is NOT a method for eliminating jobs and is NOT privatization. CSD gives city employees the opportunity to improve services by bringing their ideas into fruition. Where private firms receive the bid, most city employees are redeployed within city government. Boston does not now engage in CSD but it does contract out for many services, such as refuse collection and disposal. However, other services may be candidates for CSD after a thorough analysis and legal assessment are undertaken. The process of analyzing whether a particular service should be competitively bid, in some cases, may identify sufficient savings to forego actually bidding that service. Also, services that are now only contracted out could face a bid challenge from city employees. The advantages of CSD are that it:

- Breaks down the government monopoly
- Allows more focus on core service delivery
- Generates service improvements and cost savings
- Rewards employees for efficient service delivery
- Identifies the true cost of providing a service
- Improves the basic relationship between city and union officials

With a 70% job approval rating, the Mayor has the political capital to implement CSD now and capture the benefits in the future. CSD should not just be another program on top of a long list of initiatives rolled out at budget time. In order to be successful, CSD MUST be a top priority of the Mayor. The City Council should not be a roadblock to this program moving forward. The Mayor and Council should embrace the program, champion it and see it through the tough times as well as its success. That is a lesson that comes through loud and clear from many cities that have already implemented CSD. For Boston, this will be a difficult undertaking but one that is well worth it.

The goal of CSD is to ensure that city government: (1) delivers services that it should; (2) delivers them efficiently and (3) delivers the best quality at the best price to taxpayers. In the end, CSD will help the city and employees with growing cost and service pressures and help prioritize the allocation of resources to meet the needs of a changing city.

This report explores the theory of CSD, its benefits, lessons from the experiences of other cities in the United States, a general framework for implementing CSD, the impact on employees and opportunities for engaging a CSD program.

## What Is CSD?

First, CSD is NOT a method for eliminating city jobs and is NOT privatization. CSD is a process by which BOTH the public and private sector organizations compete for the right to provide a municipal service. It does not presume that the private sector is naturally more efficient than the public sector - it just requires both to compete for the ability to provide a service. In the end, best quality and best price win out. CSD is commonly referred to as the “anti-trust” for government because the competition breaks up government monopolies and allows for a more cost-effective, efficient provision of services. CSD does not eliminate the role of or need for government, nor does it serve as a substitute for management, it just changes the dimensions. The bottom line is to provide better service at lower cost. It is important to note, that no matter who provides the services, government is still accountable for the delivery and quality of those services.

## Why Do It?

CSD has a positive track record in cities throughout the United States. That track record includes: improving efficiency in government, improving services to taxpayers, reducing cost of delivering services, sparking innovation, improving employee morale, stabilizing or reducing tax burdens, improving working conditions, public opinion of government and employee salaries. CSD requires the City to determine the true cost of services it delivers, both direct and indirect. With this data, the City is able to benchmark or compare the quality and costs of services delivered by public employees with its private competition. These comparisons alone are helpful to ensure that costs are not spiraling out of line. Furthermore, CSD requires departments to determine exactly the work they accomplish on a daily basis, an outcome that is not always a high priority for government. Also, services that are now only contracted out could face a bid challenge from city employees.

Now is a particularly good time for the City to implement CSD with a workforce that is called upon to provide quality services with fewer employees and less funds. Boston has reduced its workforce over the past two years via early

retirement incentives and not filling vacant positions in response to local aid cuts. Opening up selected city services to competition and enabling city employees to bid is a creative approach to improving service efficiency in this environment.

## What Boston Has Now

The City of Boston awards contracts for the purchase of services from tree maintenance to road paving and refuse collection as well as parking ticket processing. These contracts however, are not true CSD because they are awarded solely to private firms with public employees never having the opportunity to bid on them. The majority of these contracts are competitively bid and all must follow the established guidelines under which they are bid. The Auditing Department is the centralized source for contract information and the Law Department verifies the legal requirements in the contract process. Departments or the Purchasing Department are responsible for the preparation of an RFP and justifying the need for a contract. Evaluating a company in terms of ability to do the job is left up to individual departments as well as the managing of these contracts. The Office of Budget Management reviews the contract to ensure that funds are authorized.

## What Other Cities Do

CSD has surfaced in many different forms in cities across the country, some dating from the late 1970s. Despite the differences in appearance, it is clear that breaking up a government monopoly on city services has been a positive step for these cities. At a minimum, the mere introduction of CSD has caused cities to look at the services they provide and why, the full cost for delivering that service and if it should continue. In some cases, the process of preparing for a competitive bid may identify sufficient savings to forego moving to the actual bid phase. Often new agencies are established to address problems but are never evaluated or eliminated if they are not working. CSD has helped cities evaluate the effectiveness of selected city services and decide on how best to direct resources toward achieving service objectives. A closer look at the experience in three cities will help explain this point.

## Three City Snapshot

### Phoenix, Arizona

Employee bids - 25  
Private bids - 40

The City of Phoenix began its CSD program in 1979. In addition to service level improvements, the City has saved over \$41.8 million since 1979. Phoenix competitively bids everything from refuse collection and emergency transportation to solid waste hauling and billing services. Since 1979, employees have won the bid for 25 contracts while 40 were awarded to private companies. Introducing competition resulted in not only cost savings, but also improved service delivery, an improved public opinion of government and service delivery and more useful management information systems. As far as employees are concerned, Phoenix has no formal transition plan, but utilizes a 9-12 month period during which employees are offered job related instruction such as computer skills, in order to be redeployed. The result was that the majority of employees were redeployed and no one has been laid-off. Phoenix has effectively integrated CSD into operations, resulting in employees competing directly as well as continual benchmarking occurring. This benchmarking pushes employees to think early on about being price competitive.

### Charlotte, North Carolina

Employee bids - 48  
Private bids - 10

The City of Charlotte initiated its competition program in 1995. Charlotte competitively bids everything from utilities and street maintenance to solid waste collections and grounds maintenance. From 1995-2003, 58 services have faced competition with the private sector. City workers received 48 of the awards and the remaining 10 went to private companies. Charlotte reports over \$14 million in savings annually, resulting from managed competition. Introducing competition in Charlotte allowed the City to maximize the efficient delivery of services, stabilize tax rates and encourage employee innovation that increased productivity. During this process, forty positions have been eliminated and most of these did not result in layoffs but transfers to other sections of the same business unit or another department in the City.

### Baltimore, Maryland

Employee bids - 2  
Private bids - 6

The City of Baltimore's competitive program began in 2001 when the City was faced with a resource crunch and a crime problem. CSD was introduced after the City had already made the difficult decisions to close libraries and fire stations – yet the financial problems continued. For Baltimore, security and custodial services are the large areas of competitive bidding. The City also includes mowing and the management of workers compensation claims in the competitive program. Since 2001, eight services have faced competition with the private sector. City employees received two of the awards and the remaining six were awarded to private companies. Baltimore reported annual savings of over \$8 million due to competitively bidding services. During this process, 267 positions were eliminated, with almost 70% being redeployed in city government. Retirements accounted for 25% of employees, while the remaining individuals were either hired by the firms or left the City for other employment. Baltimore was concerned about the employee impact and not only did they retrain employees, but these individuals were kept on the payroll for at least six months while the redeployment took place.

Services Other Cities Competitively Bid	
Phoenix, AZ	Refuse collection, emergency transportation, landfill operation, solid waste hauling, housing & lot maintenance, landscape & median maintenance, airport maintenance
Charlotte, NC	Utilities, street maintenance, solid waste collection, equipment maintenance, grounds maintenance
Baltimore, MD	Building security, custodial services, mowing, health clinic, workers compensation claims management
Indianapolis, IN	Street maintenance, airport management, information systems, microfilm, trash services.
San Diego, CA	Solid waste services & facilities, bus system, parking management, equipment, wastewater treatment

## What Can We Learn From Other Cities

There are several lessons that Boston can learn from the cities that have experience when it comes to managed competition. They include:

**Leadership.** The Mayor is key to the success of CSD. If the Mayor isn't behind CSD 100% or hasn't embraced its importance, CSD will remain a pilot program sitting in a backroom in City Hall. Additionally, the City Council's support is very important, to ensure that this creative program is allowed to proceed and supported, especially in the early stages.

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Leadership is critical, because CSD is a challenge to the existing culture of government bureaucracy. Strong leadership from the Mayor and Council is required to evolve change in a bureaucratic culture with deep roots. Because politics and politicians change, implementing a permanent structure is also very important.

**Communicate.** Communication with all of the stakeholders is important and will help move CSD along. Many cities note the suspicion and resistance that is harbored among employees, union officials, city councilors and residents once the idea of CSD is introduced. Many fear job loss, loss of control of service delivery and increased costs. These players need to understand government's plan, the vision, its importance, how it involves these players and how it can be beneficial to them and their role in government. In most cities, opposition occurred in the initial phases but tapered off with strong leadership and effective communication from the Mayor.

**Know your cost.** Understanding the true cost of delivering a specific service is key, as is deciding if a service is necessary or is an appropriate activity of government. Activity-based costing is a concept that is incredibly important for a successful CSD program. A true and accurate cost of delivering services, including overhead, is important to fairly evaluate all proposals. Activity-based costing also provides important evaluative data that will enable city officials to prioritize services when deciding how to best allocate resources and is critical for successful benchmarking.

**Fairness.** City employees and private firms need to be treated fairly. There should be no moving targets. Proposals need to be well thought out and objectives and goals need to be clear. Unions and employees need to know that the new system is credible and does not undermine their importance. A new ongoing partnership needs to be formed with unions to understand their concerns as well as to cultivate their ideas.

**Focus on the end.** It is very important that government focus on the end results of service delivery rather than the means of getting there. Any contract for the delivery of a city service must be clear on the expected outcome. CSD compels government to simply state the results it wants to achieve within legal requirements and not be involved with specifics about how the public or private vendor fulfills those goals. This gets managers away from micro managing and into a more productive management of service delivery.

**Accountability.** No matter who the vendor is, public or private, accountability and strict monitoring are keys to ensuring that contracts are executed properly. That is, providing the best service at the agreed upon price. A very important component is for each vendor to be evaluated before a contract is awarded to ensure that they are credible and financially sound. In order to maintain accountability, the original contract must be very explicit about all aspects of the service and the City must manage it to ensure contract requirements are implemented exactly.

**Just do it.** The more you study the less you do. The consensus from experience in other cities seems to be that any city implementing CSD for the first time just needs to forge ahead and do it. It is important to keep the system flexible and ready to respond to changes and mistakes.

## How To Implement CSD

Simplicity is crucial for implementing CSD. There will be many obstacles to overcome when putting CSD into practice and no need to compound those issues by developing a complex implementation plan. The following steps set the framework for Boston to pursue an effort that will inject competition into local government. The steps are a compilation from successes of cities across the country and recommendations by experts in the field. It is important to note that Boston currently has legal requirements for issuing contracts to which it must continue to adhere.

### Step 1 Form A CSD “Team”

Assembling an administrative team of key individuals in the Mayor’s Office that is solely charged with managing the process and pushing it forward is vital for success. The Mayor MUST be part of this team. This team should also include employee and union representation. This team will establish the guidelines for CSD, develop a process, identify services to be competitively bid and monitor departments’ enforcement of contracts. This team also will need to set-up a structure to evaluate the outcome of a competitively bid service. The team must be aware of and be ready to act on eliminating

services that Boston should not be in the business of providing. The City Council should be fully informed of CSD activities and monitor the program through its budget review process.

### Step 2 Understand the Costs

In order to know exactly the cost of delivering a particular service, the City must use an activity-based costing (ABC) system for services. Boston must focus on the cost of providing a service, including both direct and indirect costs. This will help to judge competitive proposals fairly. Currently, Boston employs ABC for select services during its budget process. This is a good foundation but it must be expanded upon and developed into a more comprehensive process. The CFO and the City Auditor must certify that the true costs are being used in this process.

### Step 3 Identify Competitive Options

CSD will not work for every service that government provides. The CSD team, with input from department heads, employees and union leaders should identify and evaluate opportunities for introducing competition. The CSD team should establish the criteria and ensure that adequate competition is available in the open market. To gain momentum and support, the team should start with a service that will experience the least amount of complications and resistance. There is no cookie cutter approach to implementing CSD. It is a learning process that will need to be tailored as issues arise. One common approach for identifying opportunities in this area is the “Yellow Pages” test. This exposes a public service to competitive bidding if three or more private vendors advertise the same service in the Yellow Pages.

### Step 4 Prioritize Services

The CSD team should develop a prioritized list of potential candidates for CSD. The list must be presented to the Mayor for a final action plan. The traditional request for proposal (RFP) process should proceed for those services selected. If a private vendor is selected, the contract should be

contingent upon satisfactory reference checks that ensure the firm has the ability to deliver the contracted service and that the firm is financially solvent.

### **Step 5 Establish Accountability**

The CSD team, along with the responsible department, must be held accountable for the performance of any competitively delivered service, whether the provider be a public or private entity. The final outcome of CSD will depend on how explicitly contracts are written, managed and evaluated. Managers must be trained about contract requirements as well as how to evaluate services delivered to ensure that the City receives what it pays for at the established quality level. It is important that department heads and managers not micromanage a contract - keeping them focused on the end results and less on how the results are achieved. The CSD team should prepare an evaluation process for managers that will measure the success of the competitively bid service contract and be a resource for departments throughout all phases of CSD. In the end, if government is not satisfied with the results of the contract, the flexibility remains to not renew or take action for services not rendered.

### **What About Employees?**

CSD gives employees the opportunity and incentive to improve city services, bringing their ideas to fruition. Employees can share in savings through performance-based pay and/or incentive based pay or bonuses. Inefficiencies built into the public system over time through past practices or regulations create bureaucratic red tape that stymies employees' ability to improve the operations in which they are involved. Often employees have good ideas that would improve the quality of a service as well as reduce cost but they are stifled because of the existing organization and lack of motivation.

For CSD to work effectively, city employees need to be on a level playing field throughout the process and treated fairly. Many cities have found success by providing training and budgeting and accounting support to employees so they have the

tools to be competitive in the bid process. Other cities have found the need to reduce excess overhead in departments so that employees can compete. In situations where either the successful bid by the employees or private firm requires the reduction in the number of city workers, employees generally are re-trained and moved to another area of government. In some cases, the city negotiates with the contractor to hire displaced workers. However, wage and benefit guarantees should not be made because they would unduly burden contractors.

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Employees, like anyone bidding for a service, must fulfill all the requirements put fourth in the RFP and follow all legal requirements. Any bid submitted by a group of employees must be evaluated in the same manner as private bids. The procedures of how a group of employees responds to an RFP can be developed in general terms, but it will take time and experience to work through problems that arise in the beginning stages of this process. Employees preparing a bid can seek assistance from their managers or unions. In some cities, employees contracted with a management firm to assist them and were awarded the contract. Employees who bid for a service are in a unique position of not having to worry about capital start-up costs and they do not have to pay taxes, both of which increase the cost of providing a service in the private sector. This advantage will allow employees to receive more of the bids if they can guarantee the quality and cost savings. Also, the City's Living Wage Ordinance, that requires contractors pay their employees providing services to Boston at least \$11.29 per hour, will prevent vendors from winning bids by paying significantly lower employee wages.

## Effects Of CSD On Employees

The experience of the transition to managed competition in governments elsewhere generally has shown benefits for public employees. While the perception of public employees and union leaders may be that CSD is damaging to their interests, recent surveys of the impact of managed competition on employees in other cities in the United States demonstrate a much different

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outcome. These evaluations tend to find that CSD results in few if any layoffs and that in some cities public employees actually receive a long-term benefit. In Indianapolis, the AFSCME Council 62 viewed CSD as allowing employees and the union to be an “active and equal partner in redesigning government.” The Council noted that, no union member has been laid off during this process and employees have had access to gain-sharing. AFSCME Council 62’s involvement in CSD has also given it the opportunity to return work to the public sector and to be an active player in redesigning government.

Additionally, research from the Reason Foundation indicates that there is little evidence to suggest that contracting results in massive layoffs and hardship for public employees. In fact, the trends in government are just the opposite. The Foundation states that few governments report widespread layoffs due to contracting, while the transition to competition often makes employees better off as working conditions and wages generally improve along with job satisfaction when CSD is implemented. (go to [www.bmrb.org](http://www.bmrb.org) for the complete Reason Foundation data)

## Opportunities For CSD In Boston

In Boston, before any services are selected for CSD, the full evaluative process should be followed carefully and thoroughly. As part of the review, the City should determine whether it should be the provider of services or just ensure that these services are provided. To offer some sense of the type of services that might initially be identified for CSD review, the Research Bureau does suggest a few service areas for consideration with an understanding that options are not limited to these services. They are food service delivery in the Boston Public Schools (BPS), the operation of drawbridges, street light maintenance, tree trimming, maintenance and building security. This list is offered only for the purpose of stimulating ideas. Final candidates for CSD would have to emerge after a full evaluative process.

Some of the areas in which other cities have experienced success are refuse collection and disposal and parking ticket processing that are already contracted out in Boston.

There are many more services that could and should be considered for CSD. The obstacles are many, but with strong leadership, CSD is one efficiency initiative that has a proven track record in other cities, can provide innovative approaches to delivering selected services and can make a positive contribution to Boston.



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