

Community – Military Partnership

SCOPE OF WORK

Background

I. APPROACH

In 2008 OMA introduced the Growth Management Plan (GMP) as one of the responses to the growth brought about by the 2005 BRAC. The GMP clearly characterized the relationship between the San Antonio community and the military as well as potential community challenges as communities adjust to the changing missions of San Antonio's installations.

One of the points made clearly in the GMP was that coordinated growth management planning was only a component of successful military-civilian compatible and sustainable growth. A second component is the way in which individual decisions made by both communities and the military about infrastructure and services in which they invest impact the overall picture of military-civilian compatibility and sustainability. As state, local and defense budgets become more constrained, the implications of these decisions on the overall posture of communities and the military to partner with each other is impacted.

As both communities and DoD examine ways to reduce costs, strategic military-civilian partnerships of shared services can play an integral role in ensuring an environment for compatible local economic development and growth and the sustainment of installation mission readiness. This scope of work lays out an incremental approach to explore opportunities for both San Antonio communities and its military installations to achieve cost reductions in their support and management of public and installation facilities, functions, services, and infrastructure through intergovernmental agreement arrangements for operation, maintenance, repair, services, construction, and other capital costs (or through possible capital cost avoidance).

The City of San Antonio is proposing an approach to examine opportunities to support JBSA as it manages the largest joint base installation in the DoD and the day-to-day base support operations at Fort Sam Houston, Lackland AFB, Randolph AFB, and Camp Bullis. This approach includes solidification of communication and coordination practices between military and civilian entities and stakeholders; collection of critical information for decision-makers; and completion of business cases by contractual support identifying opportunities for shared services as a model for future replication across other service areas.

For the purposes of this effort, and the following Statement of Work, the terms "Partnership" as in Community-Military Partnership and the term "Shared Services" are, more notionally than legally, defined as follows:

“Partnership”-- shall mean the relationship between the DoD/military and municipality or public authority at the local level which may provide services and/or facilities that reduce costs of military installation operations, functions, and services, without reducing mission scope or capability, over a sustained period of time, in a way that benefits the municipality or public authority.

“Shared services”-- shall mean more generally not only “shared,” but, in addition, “combined, consolidated, or purchased services,” or a combination of these and other methods which would reduce costs for the military, without reducing mission scope or capability, and at the same time benefiting the municipality or public authority. Such arrangements would be built on signed intergovernmental agreements.

II. SCOPE OF WORK

A. General Description

OMA will coordinate with the various City Departments and their JBSA military support counterparts on preparatory work in identifying specific services and areas for shared services and will enlist contractual support to provide specific and in-depth analysis leading to business cases for use by DoD and local decision-makers that characterize (and quantify fiscally) opportunities for shared services between JBSA installations and communities. The first of these business cases will be chosen based on challenges identified in the GMP and through a structured dialogue session between military and community service providers (e.g. military and civilian leaders, base civil engineers, local department of public works staff, etc.). Emphasis will be put on value propositions that are implementable in the short term and that clearly direct compatible, sustainable civilian urban growth and development.

A primary goal of these business cases will be to improve efficiency, economy, and level of service by taking advantage of economies of scale, the pool of available municipal talent, equipment, and resources to aid in reducing the operations, maintenance, and repair costs of military base facilities, infrastructure, utilities, and other services and support functions. The growth of the missions served by Joint Base San Antonio has been considerable due mainly to the 2005 Base Realignment and Closure (BRAC) actions which resulted in a significant number of new military and civilian personnel to support, not only with infrastructure, but other areas of service to accommodate the human component – the needs of families, students, employees, management staff, and many others, as well as the new or expanding organizations and missions themselves.

More specifically, the objectives of this effort are to:

1. Explore the feasibility and practicality of sharing services with the military in their functions, facilities, activities, or services; with the goal of cost reduction

- without reducing mission scope or core capability for Joint Base or its mission partners, and, in turn, bringing benefit to the municipality or public authority.
2. Through detailed and documented analysis, provide recommendations and a framework for accomplishment to include applicable capital projects; new construction; maintenance and repair; operations; new or improved services or uses; maintaining compliance with federal, state, and local laws, policies, and mandates; and other related activities amenable to shared, combined, consolidated, or purchased services in regard to the following:

B. General Work Plan (% of effort)

1. **Research and Due Diligence** (10%) – Due diligence and research during this phase will support the informed dialogue that will occur between civilian and military leaders and staff about opportunities in shared services. At a minimum this research and due diligence should provide the prospective dialogue moderator background on current civilian and military service provisions as well as potential opportunities. Where such opportunities are identified, they should be raised specifically during the structured dialogue session.
 - a. The primary source for research and due diligence will be the Growth Management Plan
 - b. Secondary sources will be the most current municipal and installation service plans, such as:
 - i. local capital improvement plans (CIPs)
 - ii. installation master plans
 - c. Best practices will also be researched, such as what has occurred in Monterey, CA through the Presidio Municipal Services Agency (i.e. the use of Federal Acquisition Regulations, Section 2667 that grants leasing authority and special legislation that enabled Monterey to partner with its local military installations).
 - d. Legal aspects – a major element of this task will be identifying and listing the possible legal challenges associated with civilian-military shared service collaborations. While those legal aspects do not need to be mitigated during this task, they should at the least be identified and listed.
 - e. Military policy – identify the various military service policies that enable, or disallow, public-public shared services.
 - f. Structured dialogue preparation:
 - i. Define and identify the stakeholders and their roles
 - ii. Summarize and enumerate the current legal and policy limitations and specify the associated challenges
2. **Structured Dialogue Session** (25%) – The structured dialogue session will allow civilian and installation service and support staff to discuss opportunities for shared service provision for several types of activities or services (as detailed below). These service provision areas should be prioritized and consolidated so as to maximize the benefits from the dialogue session. Consultant will be required

to document the time spent in contact with City Departmental personnel (other than the Office of Military Affairs) for the City’s Grant Compliance Records used for tracking for a possible City “in-kind” matching requirement. Records needs to include a breakdown by City department.

a. Service provision areas:

- i. **Transportation** (roads, curbs, sidewalks, traffic signs and signals,)
- ii. **Utilities and drainage** (gas and electric, renewable energy (solar/wind), water and wastewater, storm water drainage, point and non-point source storm water pollution monitoring, and infrastructure/facilities ownership, maintenance, & repair)
 1. A sub-element under this task should be discussion on possible energy conservation opportunities associated with this element
- iii. **Environmental** (recycling, yard waste, trash collection, ecological and conservation efforts)
- iv. **Operations & maintenance** (landscaping, grounds maintenance)
- v. If during data collection, fact finding, and analysis there appears to be another Service Provision Area that has a high likelihood and potential for application of this “shared services” concept, notify the Project Manager for further direction.

b. DELIVERABLES

- i. Short summary of dialogue that includes three (3) to five (5) opportunities for strategic military-civilian partnerships

3. **Business Case Development** (65%) – The immediate product from the structured dialogue session should be a list of no less than three (3), nor more than five (5), opportunities for strategic military-civilian partnerships. From these opportunities, additional internal dialogue should occur between military and civilian leaders and their technical experts on the feasibility of each opportunity. Based on that dialogue, no more than three (3) immediate business cases will be developed.

a. Characteristics of Business Cases:

- i. **Operational structure-** Specific technical and operational issues involved with each case (e.g. who is the “boss”—and how many bosses exist potentially associated with each shared service opportunity?) This step includes development of a protocol manual that will identify processes of management, communication, and coordination across civilian and military stakeholders.
- ii. **Organizational structure-** Recommendations for the structure, stakeholders, and format for each case so that each will meet federal, state, and local legal requirements for implementing, monitoring, and guiding such a shared service effort. In

particular, discussion about the use of a Joint Powers Agreement / Authority should occur.

- iii. **Legal aspects**- Inclusion of relevant enabling language / documents, including: Congressional demonstration language, “open base” implications, base access considerations, contracting and procurement considerations, OMB – A 87 issues, etc.
 - iv. **Financial feasibility**- Pro forma and cost model estimates for the financial operation of the case. If present, estimates on the reduction of costs achieved (without reducing mission scope or capability), or the corresponding increase in level of service.
 - v. **Timelines**- An estimate of time for a “return on investment” for each case where capital investment, personnel requirements, or other related concerns may be required.
 - 1. Prepare calendar and milestones for the project broken down by each phase/task.
 - 2. Consideration should be made into overall effort phasing, considering whether a proof-of-concept project is needed prior to full implementation.
 - vi. **Implementation process**- Steps and processes required to realign those the existing framework of service provision, including cost, staffing, management, specifics in regard to any letters of agreement or necessary contracts (e.g. inter-local agreements, MOUs, ISSAs, IGSAs, leases, etc.) for each identified and recommended shared service alternative.
 - 1. This step includes the identification of specific challenges associated with a particular shared service business case (e.g. RIFs, labor contracts).
- b. Critical Tasks During the Development of Business Cases:
- i. Continued communication with critical military and civilian stakeholders
 - 1. Set up a stakeholder portal on consultant website as a collaborative tool to help facilitate stakeholders with accurate and up to date material. Stakeholders should be able to view documents, calendars and project information.
 - ii. Continued background research and due diligence
 - iii. Establishment of performance criteria for each case and suggestions for a measuring plan once implemented
 - iv. Engagement with all stakeholders to review draft business cases prior to their finalization
- c. **DELIVERABLES**
- i. Three (3) business cases for strategic military-civilian partnerships for shared service provision, including the protocol manual referenced in Section B. 3. a., item i, above
 - ii. Provide 25 bound copies of the business cases and 10 copies in digital format (CD or DVD)

- iii. Present and discuss final report recommendations with each of the agencies identified for shared services and brief results at up to four meetings with city and military senior leaders to include a presentation to the City Council if needed.
- iv. A document, broken down by department, detailing the amount of consultant time in contact with City personnel on this project.

The consultant shall work with the City of San Antonio Office of Military Affairs appointed Community-Military Partnership Project Manager during all phases of the project. The Project Manager shall be the main point of contact for the consultant for all matters relating to the project process, timetable, contract requirements and compliance, and submission of invoices.