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SUMMARY

As authorized by the Board of Directors in 1963 and 1964, the District has actively sponsored memberships in Chambers of Commerce and professional associations.

The purpose of this report is to evaluate these organization memberships in terms of the District's changing needs and priorities.

This report identifies several areas of concern with respect to these programs and makes recommendations designed to carefully define those outside memberships which are beneficial to District operations.

INTRODUCTION

Presently, the District sponsors memberships in four different types of organizations including industry associations, safety organizations, Chambers of Commerce, and professional organizations.

The District holds membership in the following industry associations: the American Public Transit Association, the International Union of Public Transport, the Transit Data Summaries Group, the Transit Development Corporation, and the Western Public Transit Association. The RTD also holds membership in the National Safety Council. These organizations have not been included in this study.

The focus of this report is the District sponsored memberships in Chambers of Commerce and in professional organizations. An in-depth review of these memberships has been accomplished through a variety of means: review of the Membership Certifications, review of the monthly Chamber of Commerce Ambassador reports, interviews with the designated representatives to Chambers of Commerce and professional societies, interviews with Community Relations Representatives, and direct contact with organizations. Additional data was obtained from the March 31, 1975 Board Report on memberships and from an analysis of incidental expenses claimed as a consequence of membership activity.

This work has been accomplished with the almost daily assistance and advice of the Program Administrator's office.

Memberships in Chambers of Commerce and professional organizations, as provided for in the Board of Directors action of December 16, 1964, can be authorized by the General Manager provided that benefits can be shown to justify costs.

The various District supported memberships in Chambers of Commerce and in professional organizations involve a total of 111 employee memberships in 86 different organizations.

The cost of dues for these memberships is as follows:

	<u>Memberships</u>	<u>Organizations</u>	<u>Cost of Dues</u>
Chambers of Commerce	55	51	\$ 3,691
Professional Organizations	<u>56</u>	<u>35</u>	\$ <u>2,624</u>
Total	111	86	\$ 6,315

The average cost of dues paid to each organization in which the District participates is \$73.00 per organization. This works out to \$57.00 for each individual participating employee.

In addition to these annual dues, the total program costs include incidental expenses incurred by participating employees, the cost of administering the program, and the cost of lost staff time and productivity.

The cost of incidental expenses incurred by District employees and applied to District expense accounts is estimated to be \$2,000 per year and the cost of the current administrative level of this program is approximately \$4,000 per year. Because of the variables involved in accurately measuring the cost of lost staff time no attempt has been made to assess this cost.

Thus, the total cost of the RTD organizational memberships is about \$12,300 per year, not including the cost of lost staff time and productivity.

The Administrator of the membership program has been able to introduce several significant procedural improvements into the program since assuming responsibility in August, 1975. These improvements include a clarified Membership Certification and Recommendation Form, a monthly Chamber of Commerce Ambassador newsletter compiling useful and current information, a greatly improved method of maintaining up-to-date records, and projected quarterly meetings with the Ambassadors, the first of which was held on September 12, 1975.

AMBASSADOR PROGRAM

Membership in Chambers of Commerce is intended to serve as a means of useful community contact, understanding, and support for RTD programs and policies. This is referred to as the Ambassador Program.

Participants in the Ambassador Program as representatives to Chambers of Commerce are required to make monthly reports on their activity, and to identify problems and make suggestions on improving District relations with these organizations.

AMBASSADOR REPORT SUMMARY Sept. 1975 to Jan. 1976

Total Chamber Memberships	55
Chambers Reported	22 (40%)
Chambers <u>not</u> Reported	33 (60%)
Total Reports Submitted	32
Total Reports Required (55 x 5 mos.)	275
Percentage of Required Reports Submitted	12%

A cursory examination of the Ambassador Program indicates that 33 Chamber of Commerce memberships have resulted in no record of any activity or benefit to the District. In addition, of the 22 Chambers for which reports exist, five report no activity. Therefore, of the total of 55 Chambers of Commerce memberships, 38 or more than two-thirds show no record of activity.

Of the 17 Chambers of Commerce whose Ambassadors do report activity, nine record only one activity over the five month study period. Only four Ambassadors of a total of 55 indicate an acceptable level of one activity per month. This listing does not, of course, cover all activity in Chambers of Commerce, but only those which were reported by Ambassadors in the required monthly reports to the Program Administrator.

In order to more fully assess the value of the Chamber of Commerce activity which occurs, interviews were conducted with Community Relations Representatives who have been assigned to six geographic areas where the planning and implementation of new services has provided a maximal opportunity for Ambassadors to benefit the District. The six service improvements with which the Community Relations Representatives were involved were the East Los Angeles Grid, the San Fernando Grid, San Gabriel and South Bay Sector Studies, the Santa Monica Freeway Diamond Lane, and the Westwood Minibus projects.

The Westwood Minibus project is noteworthy among all of the District's service improvements because of the interest and cooperation of the Westwood Chamber of Commerce. This intense involvement, in fact, includes funding assistance, a unique form of Chamber support for an RTD service.

In none of these cases was the Community Representative able to identify any improved community support or acceptance of District programs or policies as a direct consequence of membership in particular Chambers of Commerce. Whatever benefit was gained came most notably in the San Gabriel area, in the form of access to forums of anti-District sentiment which might otherwise be unavailable. This access to these forums did not, however, result in any changes identified as pro-RTD and which could not have been obtained without Chamber membership.

Note the distinction here between District participation in Chamber of Commerce activities and membership in Chambers of Commerce. While participation is sometimes very useful, as with the Westwood Chamber, this participation should not be thought dependent on paid membership. Representatives of other public bodies, Los Angeles County for example, are frequent participants in Chamber luncheon discussions even though the agency itself is not a member.

Significantly, this forum was more available and useful to Community Relations Representatives than to other Ambassadors. The general consensus of the Community Relations Representatives interviewed on this matter is that while their access to this segment of the community is marginally facilitated, the performance of other Ambassadors has been of no essential benefit to the RTD in terms of increased support for District programs or policies.

An additional thought which emerged from these discussions with Community Representatives was that other organizations such as Lions and Rotary Clubs might be more useful community relations avenues.

It should not be inferred from this necessarily generalized description of the Ambassador Program that no Ambassadors have been energetic or resourceful. Indeed, several of the Ambassadors have performed as credits to the District and their Chambers of Commerce.

The point being made is twofold; that the great majority of Ambassadors are inactive and even those who are active are basically duplicating the work of the Community Relations Department.

These fundamental weaknesses in the Ambassador Program, even in optimal conditions, suggests that even if the administration of the program were significantly improved, the costs of Chamber membership would not be justified.

It is estimated that a more adequately managed program would cost about twice as much, or \$8,000, to administer. This would raise the program costs to over \$16,000 annually, discounting incidental and lost staff time costs.

The benefits to be gained by such a full program are limited by several factors:

- 1) The District's marketing, governmental and community relations efforts already provide a professional source of information and two-way communication expertise.
- 2) The lack of communications expertise of many Ambassadors.
- 3) The nature of the Chambers themselves. The function of a Chamber of Commerce is to work for a narrowly defined, very local, private interest.

Through contacts with other public agencies, the following table of comparisons was assembled.

AGENCY POLICY COMPARISON:
Criteria For Sponsoring Membership

	<u>Chambers of Commerce</u>	<u>Professional Organizations</u>	<u>Criteria</u>
BART	No	Yes	Dept. Need
L.A. County	No	Yes	Dept. Need
L.A. City	No	Yes	Dept. Need
D.W.P.	Yes	Yes	Dept. Need
Present RTD	Yes	Yes	
Proposed RTD	No	Yes	Dept. Need, Benefit

While a comparison of public agency practices on organization membership is difficult because of the absence of written centralized agency policies on the matter, certain conclusions can nevertheless be safely drawn as outlined above. While the City and County of Los Angeles do not generally sponsor memberships in Chambers of Commerce, they do support membership in the Junior Chamber of Commerce. BART reasons that it cannot participate in all Chambers of Commerce in its service area and therefore holds no such memberships and views all such contacts as a Community Relations function.

All four of the agencies contacted do sponsor professional association memberships on the condition that it directly relates to department function and need. Professional enhancement is in no case an acceptable criteria for participation. Professional memberships will be discussed further in the next section.

PROFESSIONAL MEMBERSHIPS

The two basic types of professional memberships to which the District is currently paying dues can be distinguished by the essential nature of their benefit and by who derives this benefit. These two types of memberships have, for the purposes of this study, been classified as personal-professional and institutional-professional memberships.

Personal professional memberships can be characterized as providing an essentially personal benefit. They aid the individual employee in terms of career enhancement and generalized professional competency. Examples of this type of membership would be the American Institute of Planners, the American Society for Public Administration, the American Society for Training and Development and the State Bar of California.

Institutional professional memberships, on the other hand, provide what is essentially an institutional benefit and as an information resource distribute material of a highly technical and specific type: it usually relates to specific RTD operations or projects. Little or no professional or personal benefit is gained by the employee who represents the District. Examples of this type of membership would be the American Standard Testing Methods, the American Public Works Association and the Transportation Research Board.

In sum, the defining characteristic of institutional professional membership is that the benefit to the District is immediate and direct: it is not dependent upon the improved professional competence of an individual employee. Personal professional memberships, on the other hand, provide a benefit which is distinctly indirect: it consists of improved professional competence of an individual employee.

That each type of membership provides a real and discernible benefit is not questioned. But, there is a question as to who benefits from each type of membership and, therefore, a question as to who should properly accept the costs of membership.

There are, in addition, other fundamental questions involving the identification of responsibilities. Is the general professional competency of professional employees primarily the responsibility of the District or of the employee? Is professional membership the best way to achieve this end? How much activity and professional enhancement actually occurs as a consequence of RTD sponsored membership?

These questions essentially involve the selection of criteria in determining which organizational memberships should be sponsored by the agency and for what reasons.

The Board of Directors' 1964 action permitting membership in professional organizations does not establish explicit standards except to say that the General Manager may approve such memberships if benefit justifying the cost can be shown.

If "benefit" can be thought to mean the general "goodwill" of the community, this would justify membership in service organizations such as the Rotary Club and the Kiwanis Club and yet the Board specifically limits memberships to Chambers of Commerce and professional organizations. Therefore, generalized public relations or goodwill as a criteria for participation would seem to be an unfair and contradictory policy.

An indirect general benefit to individual employees in terms of enhanced professional competence is also difficult to justify. Professional competence is always a pre-condition of employment in any particular position and the various District training programs such as Tuition Reimbursement can be viewed as properly the areas where improved professional competence should be developed.

Professional competence, being required of all employees, would seem insufficient to justify the cost of District sponsored membership in professional associations.

A benefit to the District which is direct would certainly seem consistent with Board policy on this matter. A direct or immediate benefit to the District would result in improved institutional effectiveness independent of one individual's improved professional skills and could also be readily evaluated in terms of the District's needs.

Professional organizations which have been classified as personal provide a more indirect benefit, while the institutional memberships provide a direct, immediate and continuing benefit to the District.

The following professional memberships have emerged from this analysis of all District professional memberships as being of an institutional benefit.

American Public Works Association: This membership is held in the name of the District and benefit is institutional: the coordination of all public works projects.

American Standard Testing Methods: This membership is held in the name of the District and benefit is strictly institutional: the acquisition of standardized product and materials specifications and product evaluations.

Building Owners and Managers Association: This membership is held in the name of the District and benefit is institutional: the acquisition of statistical data on the District's service area.

California Public Safety Radio Association: This membership is held in the name of the District and benefit is purely institutional: the coordination of use and frequency and review of assignment of all radio frequencies.

Santiago-Madjeska Peaks Users Association: Membership is held in the name of the District and is of a purely institutional benefit: coordination and communication with government agencies regarding District and other radio transmitter locations and use on those peaks.

Transportation Research Board: Membership is held in the name of a professional employee: institutional memberships are offered but are more expensive. Benefit is institutional: acquisition of technical research data relating to motor coach operations and rapid transit design and planning.

West San Gabriel Valley Planning Association: Membership is held in the name of the District and benefit is institutional: coordination and communications with other public agencies in the area.

District representatives to professional organizations are not required to report on their actual participation in organizational activities. District records rarely include the address or telephone number of professional organization offices.

There is no record of activity of District representatives, no controlled or required distribution of useful materials published by professional organizations, little control by the Program Administrator of incidental expenses incurred as a consequence of membership, little or no communication between the Program Administrator and members, inadequate follow through on administrative problems, and incorrect or obsolete membership assignments.

In order to more accurately assess the professional memberships, interviews were conducted with representatives of more than two-thirds of the District's professional membership. These interviews became,

along with the Organization Membership Certification and Recommendation forms and the Board Report of March 31, 1975, a primary source of information in evaluating and classifying the various memberships.

Due to the wide variety of organization practices and benefits, it is difficult to summarize and compare the findings of these interviews. Nevertheless, several conclusions may be drawn:

1. Many employees would hold the membership whether or not the District paid the dues. Frequently they were members before the District began reimbursing their dues.
2. In most cases, the chief benefit to the District is thought to be improved or facilitated professional competence.
3. Several employees had been professional members for six months to eighteen months and yet had failed to begin attending meetings.
4. Many employees have additional professional memberships they suggest should be District-sponsored.
5. Several employees indicate that the professional associations' directories of other members facilitates communication with other agencies.
6. The support of District rapid transit proposals is advanced as a benefit of membership.

RECOMMENDATIONS

The intent of these recommendations is to provide for District participation in outside organizations which are strictly necessary for RTD operations and which are properly the responsibility of the agency. The fundamental basis of these recommendations is the recognition that an immediate, continuing, and discernible requirement for RTD membership in outside organizations is the only responsible criteria for participation.

It is recommended that:

1. Ambassador Program

The Ambassador Program and all Chamber of Commerce memberships be allowed to lapse and not be renewed.

2. Personal Professional Memberships

Professional memberships of a personal nature be allowed to lapse and not be renewed.

3. Employee Participation

Employees be encouraged, with Department Head approval, to participate at their own expense, in outside organizations of a professionally enhancing nature, consistent with satisfactory and unimpaired job performance.

4. Membership Criteria

The criteria for District participation in professional organizations be a direct and immediate institutional benefit of a continuing nature to the District, sufficient to justify the expense.

5. Recommended Memberships

The District maintain the following professional memberships as they provide a direct and immediate institutional benefit of a continuing nature to the District, sufficient to justify the expense.

American Public Works Association
American Standard Testing Methods
California Public Safety Radio Association
Santiago-Madjeska Peaks Users Association

6. Monthly Reports

A monthly report form for District representatives to professional associations be implemented. (see Appendix)

7. Revised Certification Form

The Certification and Recommendation form be revised. (see Appendix)

8. Membership Dues

All membership dues should be adjusted to become payable at the same time.

9. Administrator's Annual Report

The Membership Program Administrator submit a yearly report to the General Manager concisely detailing what direct and immediate institutional benefit of a continuing nature membership provides, the total cost of each membership, including incidental expenses, and an assessment of each membership's activity.

10. Proof of Institutional Benefit

Failure on the part of the District representatives both to provide concrete proof of what insitutional benefit the District receives or of participation in organization activities shall result in termination of the membership.

11. One Member Per Organization

There be no more than one District-sponsored membership in each organization.

12. Membership Assignments

Organization memberships be assigned by department and duty-assignments, and not be assigned to individual employees.

13. Organization Publications

All published materials obtained as a consequence of RTD membership be deposited in the RTD library.

14. Board of Directors' Approval

The Board of Directors be annually asked to approve, on a case-by-case basis, all payments of organization membership dues.

CONCLUSION

The reduced level of organization membership proposed in this review is intended to provide for the needs of the District while eliminating "extras," or memberships for which a direct, concrete and continuing benefit to the District cannot be identified.

It is recognized that employees who have actively participated in these and other organizations to the indirect benefit of the District may at first feel that such a reduction is unwise or ungracious on the part of management.

The only response that can be made to this comes by noting the increased economy and efficiency of the District.

Current program cost is about \$12,300 yearly plus the loss of valuable staff time. The membership dues recommended here will cost about \$156 annually with very small loss of staff productivity and administration cost of perhaps \$300 for a total program cost of between \$400 and \$500 a year.

Therefore, the impact of these recommendations will be a cost reduction of over \$11,500 annually accompanied by improved staff productivity.

APPENDIX

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT
ORGANIZATION MEMBERSHIP
CERTIFICATION AND RECOMMENDATION

1. Name of Organization: _____
2. Employee's Name and Title: _____
3. Purpose of Organization: _____

4. Purpose of SCRTD Membership or Participation: _____

5. Cost of Annual Membership: _____
6. Authorization: _____

7. Recommendation: _____

Recommended:

"Payment and/or reimbursement of the described organization dues and/or fees is approved as to legality."

Department Head

Executive Staff

Program Administrator

Date: _____

General Counsel

General Manager

Present Organization Membership
Certification and Recommendation Form

Southern California Rapid Transit District
ORGANIZATION MEMBERSHIP
CERTIFICATION AND RECOMMENDATION

- 1. NAME OF ORGANIZATION: _____
- 2. ORGANIZATION ADDRESS, PHONE NUMBER: _____
- 3. ORGANIZATION PRESIDENT / MANAGER: _____
- 4. EMPLOYEE'S NAME AND DUTIES: _____
- 5. PURPOSE OF ORGANIZATION: _____
- 6. BENEFIT TO DISTRICT OF MEMBERSHIP: _____
- 7. ANNUAL COST OF DUES: _____

8. DEPARTMENT RECOMMENDATION: The above named professional organization provides sufficient institutional benefit to the department to justify membership.

DEPARTMENT HEAD

EXECUTIVE STAFF

9. AUTHORIZATION: The General Manager is authorized to approve membership and dues payment in the above professional society by and in accordance with the Board's Resolutions adopted December 16, 1964 and January 22, 1963.

PROGRAM ADMINISTRATOR

10. Payment and/or reimbursement of the described organization dues and/or fees is approved as to legality.

GENERAL COUNSEL

11. For the reasons set forth in items 5, 6, 8, 9, and 10 above, the General Manager approves District membership in this organization.

GENERAL MANAGER

REVISED CERTIFICATION AND RECOMMENDATION FORM

Monthly Membership Report Form

Name _____ Location _____ Ext. _____

Organization _____

Period Covered by Report _____

President or Manager _____ Phone No. _____

Activities _____

Publications: _____

Benefit: _____

Cost for Month _____

Signature _____

Position _____

Dept. Head Approval _____

Please forward report forms to Sam Olivito, Sixth Floor, Administration Department. Thank you.

Recommended Professional
Membership Report Form

Southern California Rapid Transit District
ORGANIZATION MEMBERSHIP
CERTIFICATION AND RECOMMENDATION

1. NAME OF ORGANIZATION: _____

2. ORGANIZATION ADDRESS, PHONE NUMBER: _____

3. ORGANIZATION PRESIDENT / MANAGER: _____

4. EMPLOYEES NAME AND DUTIES: _____

5. PURPOSE OF ORGANIZATION: _____

6. BENEFIT TO DISTRICT OF MEMBERSHIP: _____

7. ANNUAL COST OF DUES: _____

8. DEPARTMENT RECOMMENDATION: The above named professional organization provides sufficient institutional benefit to the department to justify membership.

DEPARTMENT HEAD

EXECUTIVE STAFF

9. AUTHORIZATION: The General Manager is authorized to approve membership and dues payment in the above professional society by and in accordance with the Board's Resolutions adopted December 16, 1964 and January 22, 1963.

PROGRAM ADMINISTRATOR

10. Payment and/or reimbursement of the described organization dues and/or fees is approved as to legality.

GENERAL COUNSEL

11. For the reasons set forth in items 5, 6, 8, 9, and 10 above the General Manager approves District membership in this organization.

GENERAL MANAGER

REVISED CERTIFICATION AND RECOMMENDATION FORM