



# Joint Workforce Investment

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# Joint Workforce Investment formation



## November 2005: Letter of Understanding between VTA and ATU

- Creates labor/management partnership
- Goals: improved operator/passenger relations, reduction in operator job stress
- Retains Balance.point Strategic Services (BPSS) as third party expert to do neutral assessments and build partnership

## June 2006: Joint Workforce Investment (JWI) formalized

- Scope of JWI includes both Transportation and Maintenance Divisions
- Goals: Workplace Solutions, Career Development, Public Service

# Developing Labor/Management Partnerships



## Biggest challenges:

- Changing from confrontational relationship to cooperative relationship
- Staying on mutually identified common ground
- Acknowledging and respecting the separate interests of the parties
- Identifying which issues are JWI and which are collective bargaining

## Balance.point Strategic Services facilitated the new partnership through critical first stage:

- Neutral assessments: 150+ interviews/focus groups
- Building relationships: regular monthly meetings; strategic planning retreat
- Action on immediate concerns: access to yards, improved communication
- Develop resources: Governor's training grant, college partnerships
- Design new systems: upgrade training, succession planning



# JWI Mission Aligned with VTA Goals & Priorities



VTA Goals and Priorities	JWI Mission	ATU Vision: Thriving at work
<ul style="list-style-type: none"> <li>• Enhance customer focus</li> <li>• Maintain financial stability</li> <li>• Training</li> <li>• Performance management</li> </ul> <ul style="list-style-type: none"> <li>• Enhance customer focus</li> <li>• Maintain financial stability</li> <li>• Employee ownership</li> <li>• Training</li> <li>• Succession planning</li> </ul> <ul style="list-style-type: none"> <li>• Enhance customer focus</li> <li>• Employee ownership</li> <li>• Training</li> <li>• Performance management</li> </ul>	<p><b>Workplace Solutions</b></p> <ul style="list-style-type: none"> <li>• Enhance professional levels of operation (Transportation, Maintenance)</li> </ul> <p><b>Career Development</b></p> <ul style="list-style-type: none"> <li>• Career Ladder, Training and Support systems</li> <li>• Address employee well being (on and off the job)</li> </ul> <p><b>Public Service</b></p> <ul style="list-style-type: none"> <li>• Enhanced service standards</li> <li>• Employee pride</li> </ul>	<ul style="list-style-type: none"> <li>• To enhance the health, safety and job satisfaction of our members</li> <li>• To enlarge the toolbox for handling problematic workplace behavior</li> <li>• To provide a template for a new problem-solving mode</li> <li>• To help secure the long term stability of our careers by raising marginal ridership</li> <li>• To strengthen the credibility of public employees and government, using JWI to increase professionalism and efficiency</li> </ul>

# Current Methodology for Joint Workforce Investment



**Balance.point Strategic Services** utilizes the following three-step process for JWI's current activities:

**Step 1 Clear Assessments:** Neutral snapshot of actual state

**Step 2 Productive Actions:** Get stakeholders directly involved in the change process

**Step 3 Rapid, Lasting Results:** Creating the environment for positive, lasting change...



# Step 1: Clear Assessments



Clear assessments are the baseline “snapshot” of the actual state.

- “What are your top three issues?”
- “What actions would you take to make positive change?”

Transportation (*Winter 2006*): interviews with 96 participants

Maintenance (*Fall 2006*): interviews with 66 participants

Way Power & Signal (*Winter 2007*): interviews with 70 participants

## Step 2: Productive Actions



It is **essential** for JWI to take **actions that reflect the insights** of the participants interviewed during assessments. These actions **build trust** and create momentum towards the **desired operational state**.

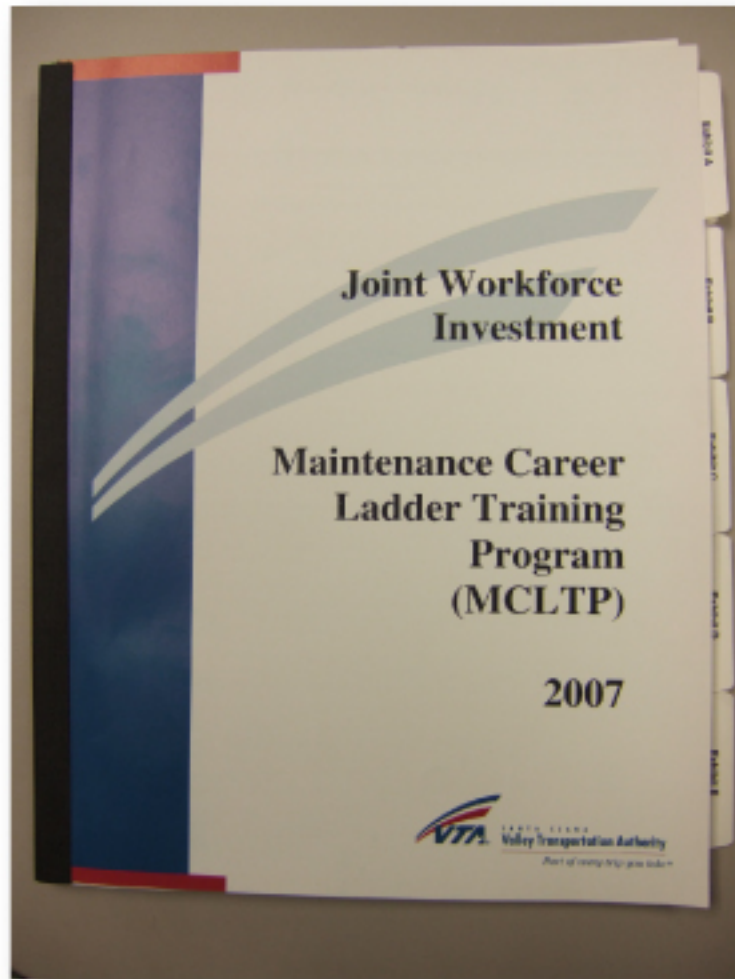
JWI current actions are organized into three projects:

Maintenance Career Ladder Training Program  
*launched March 2007*

Way Power & Signal Initiative  
*launched October 2007*

New Operator/Mentor Pilot Program  
*launching January 2008*





## **Maintenance Career Ladder Training Program**

# Basic Facts



For any given week VTA Maintenance completes:

- 1,218 repair work orders
- 300 preventive maintenance (PM) work orders
- 2,165 buses for pull-out







# New Transit Technology



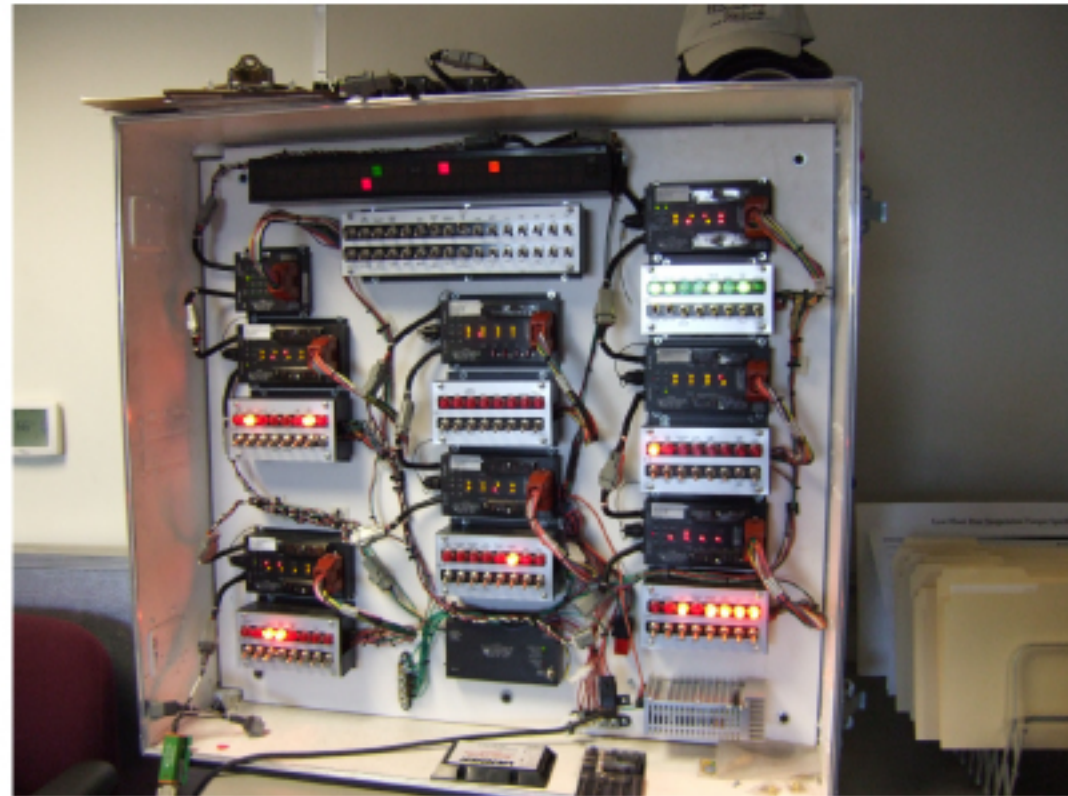
*"A bus these days is really a computer on wheels."*

The largest issue for transit agency training departments is the **application of technology** in today's bus and rail vehicles.

New technology **complicates the tasks** workers are required to perform.

Half the bus and rail vehicles in the VTA fleet were **built in the last seven years**.

These newer vehicles are **almost completely dependent on electronic controls**.





# New Technology = New Skills



**Computer diagnostics** are necessary to troubleshoot and identify problems, but many mechanics lack the needed computer skills.

Many **lack the fundamental theory** behind electronics, logic controllers and circuits, and other components needed to effectively troubleshoot and repair problems.

Upgrading training is essential to maintain VTA's **ability to meet daily service needs.**

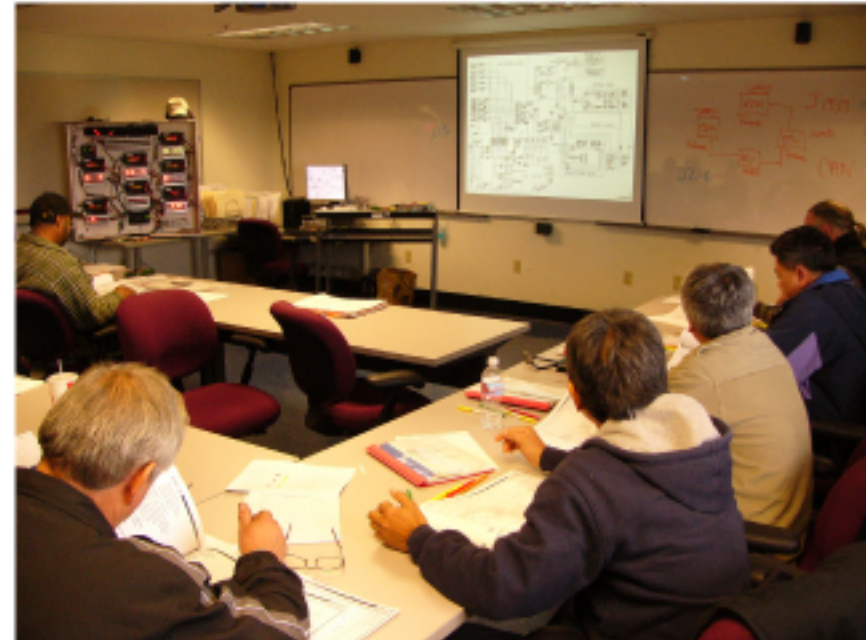
Upgrade training is essential to maintaining ATU's **professional edge in the transportation industry.**



# On the Move with the MCLTP

## Top Priorities:

- Electronics & Programmable Logic Controllers (PLCs)
- Electrical Systems
- HVAC



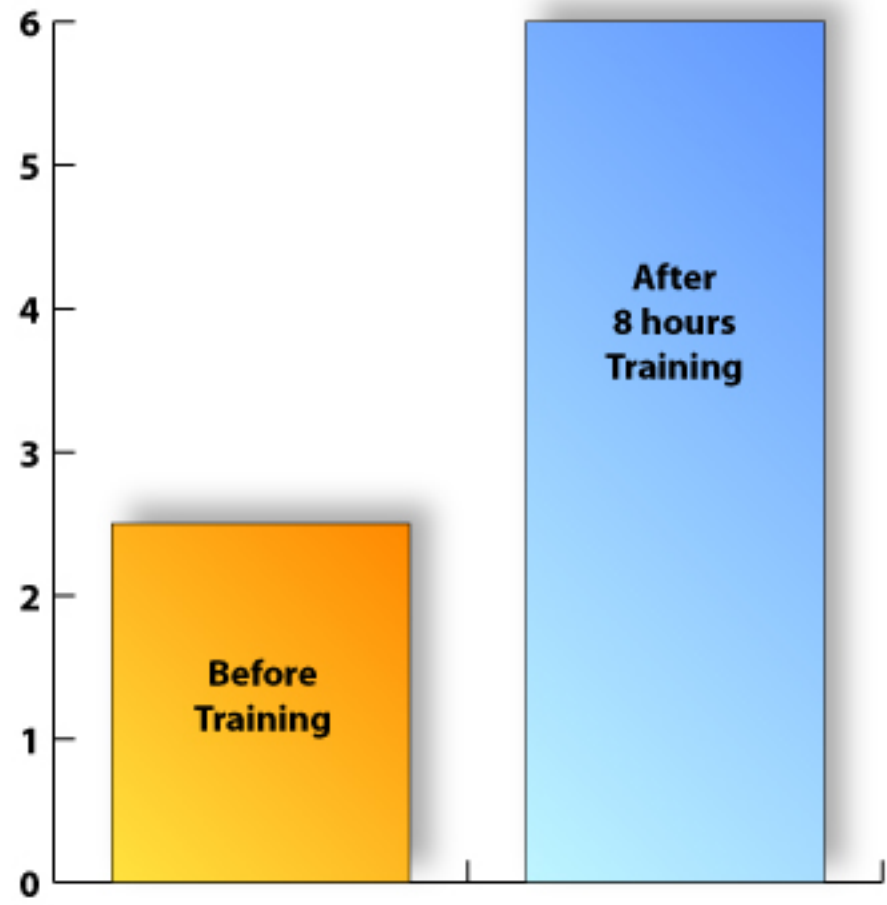


# Training Results

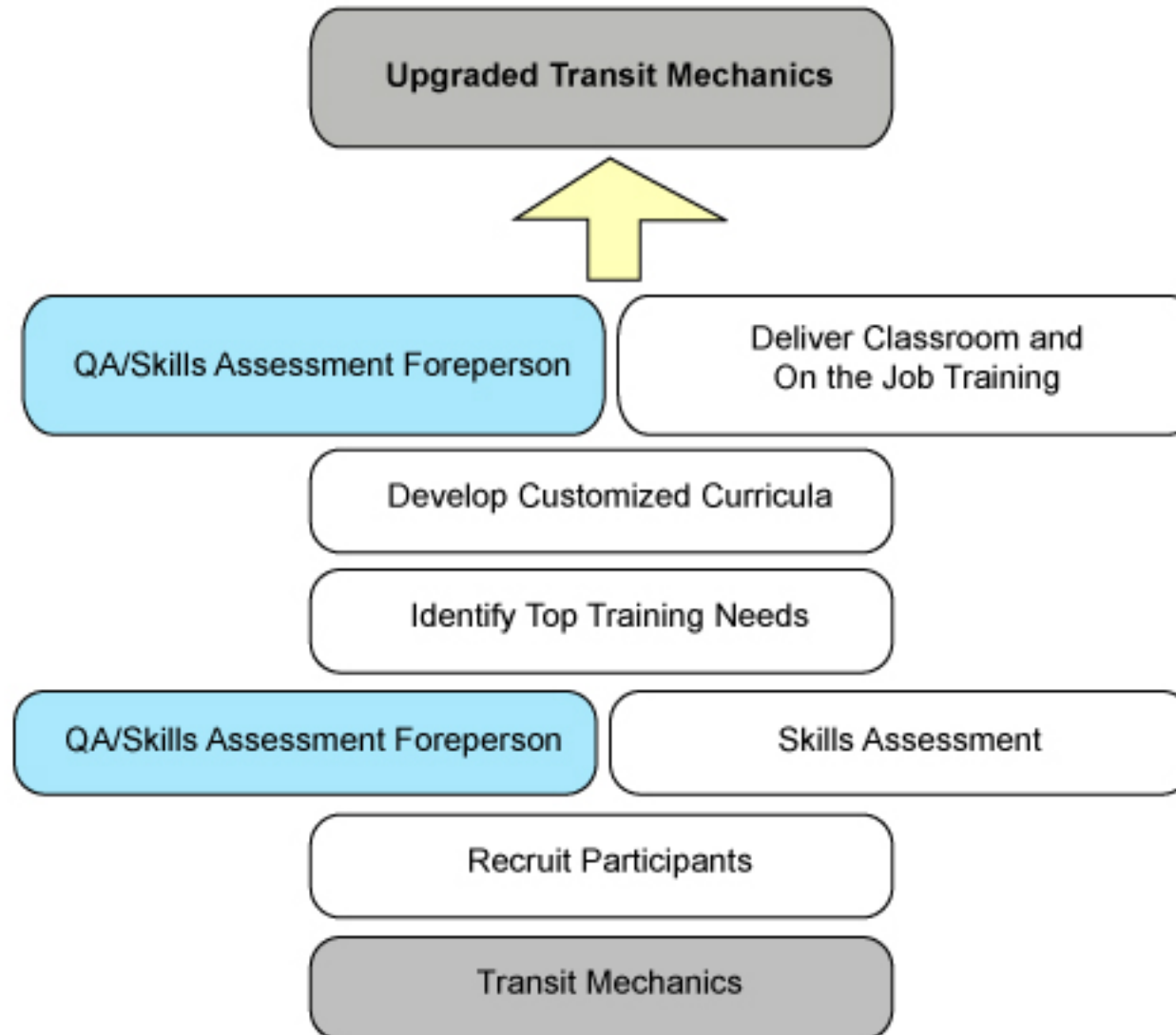


After only one 8 hour training session, the average score on PLC testing rose by 240%.

### Average Score on PLC Testing



# Training Infrastructure

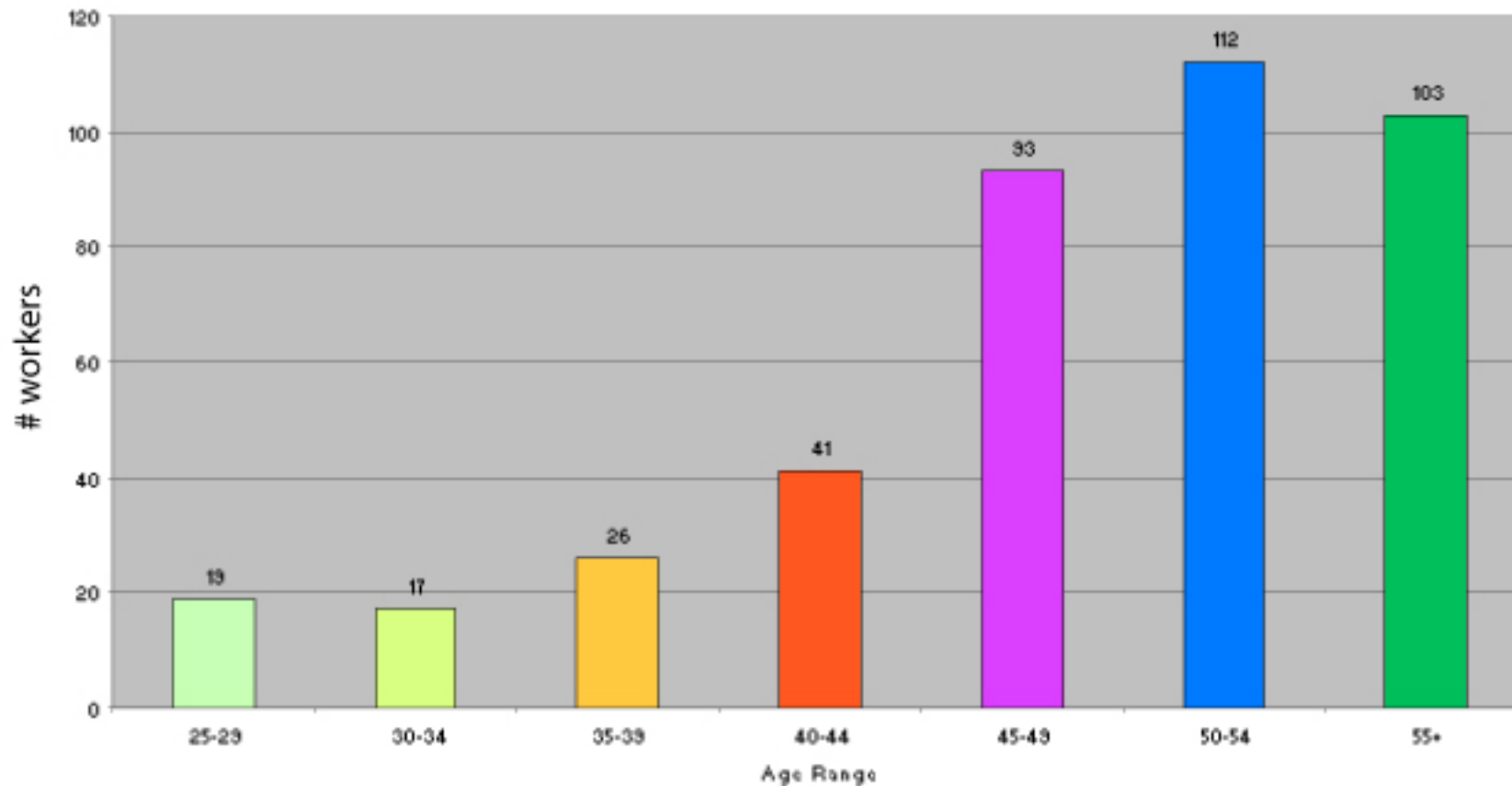




# Urgent Need: Succession Planning



Age Distribution of VTA Maintenance Workers as of October 2006



# New Trainee Position: Mechanic Helpers



Eligible for Service Mechanic



Coaching and Mentoring  
by Senior Mechanics

Deliver Classroom &  
On the Job Training

Complete Basic Auto Mechanics  
Course (Community College)

Recruit Participants

VTA Entry Level Workers





# MCLTP Outcomes

- Skills gap analysis creates **roadmap for future** training programs
- **Career ladder established** to address pressing need for transit mechanics
- “Peer to Peer” system created for **supporting training needs**
- 90 Transit Mechanics receive **skills upgrade training**
- 10 Entry level workers become **Mechanics Helpers**



# Insight

“I think it allows people that are in a dead end job opportunity to move in a new direction. Everything about it is positive.”

“JWI is helping make VTA the preferred employer which is critical as we grapple with a retiring workforce - we need employees to stay with VTA; JWI is helping make that happen.”





*Joint Workforce Investment*

# Way, Power and Signal Initiative





# WP&S: Key Role for Safe Operations



## **Way:**

*Track maintenance*

## **Power:**

*Overhead lines,  
electrical substations*

## **Signal:**

*Train signal switches,  
traffic gates, station signs,  
fare boxes*



*(Station maintainers: maintenance of stations, park/ride lots)*



# Basic Facts



Joint Workforce Investment

<b>Track-basic facts</b>	<b>Signals basic facts</b>
90.1 miles of track to be maintained	5 South-line Grade Crossing PM's
25 Spring Switches	16 Mall/Younger Switches
26 Weir SW W/Connecting Rod PM	11 South-line Emergency Lighting
18 Weir Electric Locks	22 Tasman Switches/Signals
11 Whorton Spring Switch	4 Capitol Switches/Signals
49 Mainline Power Switch	16 Tasman Grade Crossing & Bell PM
54 Yard Switch PM	17 Vasona Grade Crossing & Bell PM
Contract Support	65 Stations Platform/ADA lifts
<b>Power – Overhead basic facts</b>	11 Shop Vehicles
85.1 miles Overhead	16 Mall Switches/Signals
191 Manhole	14 Vasona Switches/Signals
22 Park & Ride Lots	463 Tasman Vital Relay Inspections
4,450 Trees to trim	559 Guadalupe Vital Relay Inspections
17 Disconnect Switches	48 Crossing Gates
	163 System T Signals
<b>Power – Substation basic facts</b>	144 Ticket Vending Machines
32 Substations	140 Visual Message Board
6 shop stingers	20 Electric Lock
Contractor support	41 South-line Signal Case PM
	SCADA
	Trouble calls
	Contract Support

# Needs: Staffing



- Difficult to recruit and retain highly skilled technical workers
- Current employees leave for other positions/retirement
- Lack sufficient administrative/technical support systems



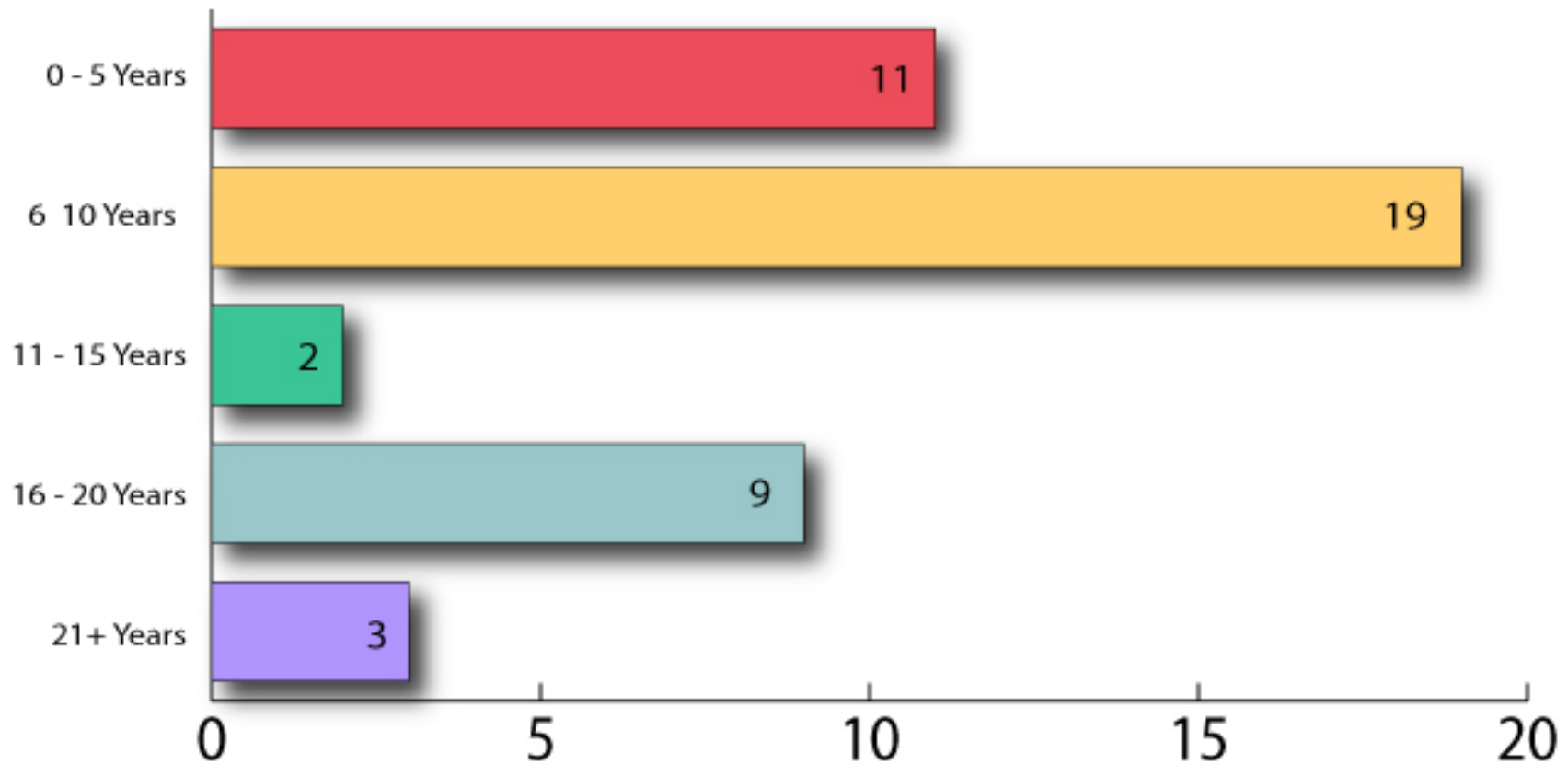


# Succession Snapshot



## WP&S Employee Seniority

as of February 2007



# JWI Target Areas



- Create **short-term training positions** with existing staff with specific expertise
- Career ladder and leadership training
- Enhanced Safety training
- Explore apprenticeship program for long-term needs (evaluate existing programs)
- SAP streamlining and support



# Outcomes



- Enhance the overall mission readiness of WP&S
- Develop new levels of safety, training and accountability
- Build new awareness and pride in WP&S roles and responsibilities
- Increase levels of professional public light rail service

# New Operator/Mentor Pilot Project





# Basic Facts: Pull-out

Yard	Weekday		Weekend	
	AM	PM	AM	PM
Chaboya*	145	149	87	70
Cerone	109	115	59	49
North	89	91	49	34



\* Chaboya delivers 2,000 hours of transportation service to the public **every weekday**

# Need:

## Enhance overall quality of operator/passenger relationship

### Improve operator ability to handle stress of multiple priorities and life issues:

- safe bus operation
- passenger needs
- staying on schedule
- balanced family life
- health and wellness





# Focus Groups



22 Chaboya operators chosen by management and peers as “the best”

- What was the hardest thing to learn when you were new?
- How do you handle stress on the job?
- What would be most helpful to promote better operator/passenger relations?

# Operators: Top Nine Challenges



1. Learning the routes
2. Keeping schedule moving, juggling multiple tasks/priorities
3. Passenger relations (people skills)
4. Passenger types (special needs, students)
5. VTA operational support (policies, procedures)
6. Personal adjustments to new work environment
7. Fare questions from passengers
8. Coach operation (driving skills)
9. Tight scheduling impact on operator health



# New Operator/Mentor Highlights



Target group: New operators graduating January 2008

- Support classes and meetings
- Training materials
- Access to experienced operators as mentors
- One year support, three year tracking

Mentors: Experienced Chaboya operators

# VTA Operator Skills Checklist



- New Skills Checklist for journey level operator
- Internal measurements: quantitative and qualitative
- Determine best practices:
  - Outstanding operator/passenger relations
  - Operator well-being for long term performance



# Clear Performance Metrics



A new **Skills Assessment Checklist** gives new operators and mentors a **safe way to measure their progress** on the road to being a journey level operator.

**Overall group results** will help JWI support new operators and develop additional programs.

Checklist results will **not be used by VTA for individual supervision.**

## VTA Operator/Passenger Skills Assessment Checklist For New Operator Pilot Project (draft 1) To be given every two months...

**Green (G):** I do well in all areas and don't need any help.  
**Yellow (Y):** I generally do well but would like help in a couple of areas.  
**Red (R):** I am uncomfortable in this area and would like help.

	Operator Technical Street Skills	Circle one	Comments - In what areas would you like help.
1	The operator can juggle multiple tasks/priorities successfully and in a safe way for both the public and self.	<input type="radio"/> G <input type="radio"/> Y <input type="radio"/> R	
2	The operator is comfortable with the equipment and can operate it safely and efficiently.	<input type="radio"/> G <input type="radio"/> Y <input type="radio"/> R	
3	The operator is comfortable with the routes and can navigate them successfully on a regular basis.	<input type="radio"/> G <input type="radio"/> Y <input type="radio"/> R	
4	The operator is familiar with VTA passes and fares and can calculate them accurately.	<input type="radio"/> G <input type="radio"/> Y <input type="radio"/> R	
5	The operator can answer routine passenger questions accurately.	<input type="radio"/> G <input type="radio"/> Y <input type="radio"/> R	



# “Operator to Operator” training modules



## Module One: Fare Issues

Anyone Have Change?

Do You Take A Check?

Switching One ID Pass

Excuse Me...



### Module Two: Helping One Another

Take a Break Break!

Fix an Offending Error



### Module Three: Passenger Issues

Where Does The Bus Go?

I Want To Be On That Bus!

Thank You For Getting Off!

Excuse I Helped!



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# “Operator to Operator” comments on training modules



“When you see other drivers acting it out, it has a different effect than a canned training.”

“Drivers don’t feel so isolated; others are going through similar challenges.”

“(Using operators in the modules) makes it more real, means something more...”

“(Advice is) more credible coming from operators...”

# Cost Effective Program



- No loss of service during mentor activities
- Integrated into ongoing operations as much as possible
- Much mentoring done on operator's own time



# Outcomes



1. Support new operators to become **highly skilled professionals** in service delivery (technical skills and passenger relations skills).
2. Connect operator **personal well being** (adjusting to schedule, work rules; stress management, on and off the job) to the **ethic of service**. "What you give out, you get back".
3. Build a **core of experienced operators** who share their knowledge and experience in creating a **culture of skilled professionals** in public service.
4. Create a **peer-to-peer learning and support** network.
5. Establish **meaningful evaluation methods** to measure the impact and alignment with JWI's vision and strategic goals. Metrics will **give insight to overall trends** and needs. Metrics will be used to **celebrate overall operator group progress**; they are not for individual operator supervision.

# Future Program Expansion



- **Expand mentor program** to Cerone and North yards
- Create **ongoing, professional development training** for operators during their VTA careers.
- Establish **benchmarks and training materials** for operator career ladder program



# Insight



“It was very refreshing and encouraging to hear about positive things that ATU and VTA will do together.”

“I felt really listened to... it was really helpful to hear that other operators could relate to what I was feeling. It was a great opportunity to sit down and to talk about work in a positive way.”

“The Operator mentor program helps with employee retention, so we don't waste the training investments we've made.”

# Step 3: Rapid Results

## *Creating the environment for positive, lasting change...*



### **Management:**

"JWI provides a non-confrontational setting to discuss and resolve employee concerns before they become grievances."

"JWI is a conscious effort to be positive and supportive and collaborative."

"JWI gives the rank and file a voice. They have a chance to participate in solving the issues that affect them everyday. The outcome is improved employee morale and improved customer service."

"JWI has been great. All the players are at the table: HR, management, labor, analysts... so decisions can be made right then and there."

"My first thought is that it gives us an alternative to discipline. It is a forum or place in which to discuss workplace performance issues without having that conversation tainted by discipline..."



# Step 3: Rapid Results

## *Creating the environment for positive, lasting change...*



### **Union:**

"The Mechanics Helper program gives them hope. There is excitement about it... There is opportunity now for people to turn this into a real career."

"We spend fully a third of our adult lives working. We carry the habits of heart, mind and body home with us when the day is over..."

The union's intent with JWI is to build the professional skills, the group pride, and the attitudes necessary to truly thrive at work so that we will thrive in our families, too. "

# What does Joint Workforce Investment mean to you?



## Maintenance:

"I would like to see our union work with VTA to create more opportunities like this, and to create more training opportunities to become Transit Mechanics. We want to be on the same productive page with VTA. This was a joint effort of the union and VTA, and we expect that both will continue to work at this for the betterment of the employees, the union, VTA and the public."

*RM, new Mechanics Helper trainee  
Cerone Division service worker for eleven years*



# What does Joint Workforce Investment mean to you?



## Transportation:

"I am very excited to be involved in something positive that is going forward into the future. We are continuing what we started (in the focus groups), following through... This is an opportunity to do some good, and I get to be in it... not just drive a bus, but actually be a part of it."

*RD, Mentor for new operators*

*Chaboya Division operator for twenty years*