WORKFORCE DEVELOPMENT:

PUBLIC TRANSPORTATION’S “BLUEPRINT”

FOR THE 21ST CENTURY
Dear APTA Board of Directors,

The Strategic Plan approved by our Association in October 1999 underscores the critical importance of the public transportation industry to both our economy and overall quality of life. Just as important as investment in our physical structure, our Plan recognizes that key to our future competitiveness and growth is the ability to attract, hire and retain the best people. Our success requires a workforce that is in every way representative of the rich mix and diversity of the communities that we serve across North America -- and the world.

APTA's Workforce Development Initiative (WDI) is designed to address one of our greatest challenges as we move into the 21st Century. "How do we position our industry as "an employer of choice" -- and strengthen the image of public transportation as a vibrant, meaningful, great place to work?" Appointed by APTA Chair Ronald J. Tober, I have been pleased to lead the task force charged to develop a comprehensive overview of the human resources challenges facing our industry and an Action Plan for addressing this pressing set of industry issues.

Over the past several months, the WDI Task Force has worked to obtain input and insights from a broad spectrum of interested and knowledgeable individuals -- both within and external to our industry. Central to our work has been the funding support provided by the Transportation Research Board for the scoping study, which underpins our initial report. Listening/Action sessions on workforce development were held at every major APTA meeting this year. As part of our study, in-depth interviews were also conducted with a broad cross section of transportation industry representatives and prospective external benchmark companies.

On behalf of the WDI Task Force, I am pleased to present the final report titled "Identification of the Critical Workforce Development Issues in the Transit Industry". This report:

- Provides an overview of the major human resources challenges facing our industry;
- Identifies examples of innovative approaches to workforce development -- already underway within our industry;
- Points out some of the creative approaches and lessons to be learned from other businesses and industries;
- Identifies those tangible products from the WDI that APTA members have prioritized as most important and beneficial; and
- Recommends next steps - both immediate actions and longer-term strategies -- to help our industry more effectively address our overall human resources challenges, on an ongoing basis.
The results of our work are clear. How we attract, hire and retain a diverse team of highly competent and committed professionals (at all levels) is of vital importance to every segment of our industry. As we move forward, we must bring a new focus on human resources to every aspect of our daily operations. Bottom line, in the final analysis -- our employees are truly our greatest asset.

Sincerely,

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WORKFORCE DEVELOPMENT
INITIATIVE TASK FORCE

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Identification of the Critical Workforce Development Issues in the Transit Industry

Brian H. Vogel
August 31, 2001
AUTHOR’S NOTE

Without the enthusiastic cooperation of persons throughout the public transportation industry it would have been impossible to produce this report. Special thanks are due to the members of the Workforce Development Initiative for their unfailing insight, support and assistance. I would like especially to single out Beverly Scott, M. P. Carter, and Stephanie Pinson for their help in identifying persons to interview and for their assistance in arranging the interviews. I am indebted to Robert Irwin of BC Transit, and Gail Charles of WMATA for their thoughtful comments on earlier drafts of the report.

Vivienne Williams and Pamela Boswell of the APTA staff have skillfully and efficiently served as liaison with the Workforce group and the rest of APTA.

Of course, the thirty-one persons who took the time from their busy schedules to share with the industry their insights on workforce issues deserve the greatest thanks. I have tried my best to accurately and fully reflect what they told me. I suspect that I have not always succeeded, and take full responsibility for any errors in transmitting their views to their colleagues in the transit industry.

EXECUTIVE SUMMARY

APTA’s Workforce Development Initiative is designed to address one of the public transportation industry’s most critical problems: attracting and retaining a skilled, committed, and diverse workforce. As one of its first steps, the members of the Initiative team initiated a “scoping study” to identify:

- The most important challenges the transit industry faces in workforce development.
- Current innovative approaches to workforce development on the part of both transit agencies and external “benchmarks”.
- The most useful products of the Initiative for APTA members
- The next steps the Initiative should take to help the industry address workforce development on an effective, ongoing basis.

This report presents the results of the scoping study. It is based on interviews with APTA members at large and small properties from across North America. The report also reflects interviews with other key stakeholders—academics, transit-related businesses, labor—and with “benchmark” industries that face similar workforce challenges. The benchmark industries surveyed include airlines, passenger rail, and package express companies.

The study’s most striking results include:

- APTA members agree that workforce issues are critical to the continuing success of the industry. Every property interviewed identified particular, severe problems it faced in
recruiting and retaining a skilled workforce. Changes in technology and in demographics drove some of the most severe problems. The industry’s recent growth was also compounding workforce challenges.

- Addressing workforce issues may require fundamental changes in the “culture” of the public transportation industry. Many of those interviewed—especially those most innovative in addressing workforce challenges—felt that the traditional culture of the public transportation industry made it difficult to address adequately workforce issues. The industry has been hardware, not people-oriented. People management skills are not rewarded or appreciated. The industry has also tended to be ingrown and cut off from other parts of American business. As a result, it has not learned how more sophisticated organizations recruit and retain their workforce. One key part of addressing the workforce challenge is finding ways to transform deeply rooted cultural attitudes and practices in transit.

- There is strong support for an ongoing industry wide effort to help transit properties address workforce issues. That effort needs to be multi-pronged. It should include improved information exchange, education and training, continuing studies, “best practices”, and other approaches. Section VI of the Report provides greater detail on particular support APTA members would like to receive. These include:
  - APTA-sponsored development of courses and instructional material in areas like Human Resources planning, diversity, and compensation.
  - A regularly updated online catalog of available courses and other resources on workforce issues.
  - An in-house consulting function on workforce development and human resources issues in general.
  - A regular benchmarking program.
  - Improved information exchange on workforce issues (e.g., a list serve).
  - Industry-developed models that could, for example, measure the return to training or other human resources development.
  - Studies on particular issues (e.g., key job competencies, or portability of benefits).
  - Training models.
  - Collective programs to get younger workers to consider transit jobs.
  - Regular and effective forums for information exchange.
  - A model background and training package to educate Boards and others on workforce challenges and options.
  - “Image improvement”, including Public Transportation Partnership for Tomorrow (PT)²

- External and internal benchmarking is widely seen as one of the most critical parts of an ongoing workforce development program. Other industries face the same problems as public transportation. A regular program of benchmarking with these industries can provide important lessons to transit. Benchmarking can also help to break down the barriers between transit and other industries that contribute to transit’s cultural isolation.

- Innovative programs to improve workforce recruitment and retention exist throughout the transit industry. Section IV of the main report lists these innovative programs as
cited in the study interviews. *The absence of mechanisms that help the industry as a whole learn from the successes of individual properties means, however, that innovation is not shared effectively.* Any benchmarking program must therefore cover not just other industries, but also the best examples of innovation within transit.

- The Initiative needs to recommend ongoing processes and institutions to support workforce development. Without continued leadership and attention to workforce issues the industry will simply move on to the next set of issues. High level attention alone, however, is not enough—there also needs to be an institutional structure for supporting the recommended information exchange, best practices, research and benchmarking programs. One of the principal outcomes of the Initiative must be a detailed recommendation for how workforce development can be permanently supported within the industry.

- The industry needs to address sometimes difficult institutional issues in crafting its approach to workforce challenges. Addressing compensation issues, for example, may require programs of Board education and outreach. Labor has taken a lead on some workforce issues and is very interested in greater cooperation with management. The interviews suggested that labor management cooperation was not always as strong as might be ideal.

- Problems are North America-wide—and some of the most interesting innovations come from north of the border. Canada has paid more attention to workforce issues, and in a more organized fashion, than has the U.S. Canada’s nationwide approach to workforce development—for example, its Canadian Motor Carrier Passenger Council—is a model for U.S. action.

- Interviewees identified and discussed a number of particular concerns. Each of these issues is considered in more detail in Section III. Section IV describes promising approaches to the same issues. The issues identified include:

  - An aging workforce.
  - Problems with succession planning.
  - Recruitment difficulty for particular specialties, like IT and engineering positions.
  - Problems with adequate or properly structured compensation.
  - Concerns about the industry’s “image”.
  - Demographic issues, including changed generational attitudes and the “new immigration”.
  - Old fashioned or rigid work organization.
  - Changes in technology (which can draw some workers to transit and cause problems with others).
  - Institutional barriers to workforce innovation.
  - Training issues (an industry strength, on the whole).
  - Planning (and failure to plan).

The Report concludes by recommending the following “next steps” for Initiative team members to consider:
• The Initiative Working Group should flesh out in detail the structure, role and responsibilities of a permanent Workforce Development process within the industry.

• As the Working Group is developing the nature and structure of an ongoing Workforce Development process, it should conduct high profile research in a limited number of the most important areas, such as external benchmarking.

• Given the importance many of those interviewed put on changing the internal culture of the industry, the Working Group should consider a project to further explore the need for and desirability of “culture change.” This could take the form of a series of outreach sessions, high profile roundtable, or a study.

• The Working Group should work with the two major transit labor unions to determine if there are opportunities for creating joint projects addressing workforce issues. At the least, an ongoing process for consultation and exchange of ideas should immediately be initiated with the labor representatives already working on these issues.

• The Working Group should consider ways to enhance cooperation with the Canadian Motor Carrier Passenger Council from across North America.

• The Working Group should consider sponsoring one of the widely supported initiatives, such as developing a model course on HR planning.
I. Introduction and Methodology

This report presents the results of a scoping study on “Identification of the Critical Workforce Development Issues in the Transit Industry”.

The objectives of the study were to:

- Identify the key workforce challenges facing the public transportation industry.
- Identify current approaches to addressing those challenges.
- Clarify APTA members’ expectations from the Workforce Development Initiative.
- Suggest to the Workforce Development Initiative a study agenda and “road map” going forward. The members of the Initiative Working Group asked for an agenda that includes suggestions for future research, including external benchmarking. They also asked that the report recommend concrete steps to improve workforce development. These should include recommendations for creating institutions and processes for improving workforce recruitment and retention.

The first phase of the study (March and April 2001) was based on a Workforce Development Initiative team survey and interviews, along with material from the Workforce Development Initiative’s Listening/Action sessions. A list of the Listening/Action sessions is attached (Attachment A). The key issues identified in the first phase of the study are also attached (Attachment B).

The second phase of the study (May through July 2001) included in-depth interviews with transit industry leaders, as well as outside experts and representatives of “benchmark” companies. The consultant also reviewed further questionnaire responses from persons not on the Task Force or interview list. A full compilation of the questionnaire responses is available upon request from APTA.

The interview questionnaire was designed to encourage more detailed discussions about the principal challenges facing the industry (with special attention to technology, industry image, and demographic change). It also asked those interviewed to discuss promising approaches to addressing those challenges; recommend candidates for internal and external benchmarking; and explain their expectations from the Workforce Initiative. A copy of the Interview Questionnaire is attached (Attachment C). Attachment D is a list of those interviewed.
II. Overview of Interview Findings

A. There is an industry consensus on the importance of workforce issues, but concern about the industry’s ability to craft solutions

If there is a single message that comes from the interviews it is that Workforce Development is seen universally as a critical challenge for the transit industry. Perhaps the best evidence is negative: almost no one within transit that was asked to take part in an interview failed to cooperate.¹ No one, moreover, has said that these are unimportant or secondary issues.

Interviewees have been exceptionally thoughtful in their responses. This thoughtfulness reflects an ongoing engagement with these issues within their own properties. Virtually everyone within the industry pointed to concrete examples of how their own organization was affected by Workforce issues, and most could point to particular steps they had taken to address them.

In part, this is because the industry is under new pressure to recruit and retain staff as it grows and changes. Public transportation is expanding in response to concerns about sprawl and congestion. The nature of jobs within the industry is changing as transit becomes more technology-dependent, and as the challenges faced by transit managers at all levels (especially the more senior ones) become more complex.

The strong interest in workforce issues also reflects a widespread sense that transit lags other industries in addressing its human resource challenges. Many of those interviewed see industry workforce practices as rigid and outdated. They see other industries devoting far greater resources to workforce issues—more management time, more planning, larger financial commitments. These observers identify as transit’s key workforce challenge the need to bring workforce practices in line with those of the “best” organizations. As discussed below, there is a widespread belief that doing so will require fundamental changes in the “culture” of the industry.

The consensus on the importance of the issues means that the Workforce Development Initiative has enormous support within the industry for “doing something”. The common belief that solving the industry’s workforce problems will require significant cultural change means, however, that the Initiative faces considerable skepticism about the degree to which it can actually develop programs for change.

¹ This is almost unheard of. The author has found that in other projects participation in interviews varies between about one-half to two-thirds of those asked. High ranking executives must take an hour of their time (or more, counting time spent reviewing the questionnaire) to discuss issues of general concern to the industry, without an immediate direct return.
The Initiative therefore needs to act on two fronts. It is important to identify concrete initiatives aimed at particular challenges (benchmarking on mechanic training for example). At the same time, it is vital to identify and support broader programs that can help change the cultural attitudes that make the industry a laggard in addressing human capital issues. The key to simultaneously addressing particular needs and broader cultural attitudes may be to design projects and programs so they meet both goals. This will require a constant awareness of how programs can be designed to change management attitudes as well as address particular needs.

B. There is relative consensus on the nature of particular challenges but concern that the industry is less good at finding solutions

Just as there is agreement that the industry faces serious challenges in recruiting and retaining staff, there is considerable agreement on the nature of the particular challenges. The interviews identified a list much like that of the Working Group, the listening sessions, and the first round of written responses (see Attachment B for the initial list identified by the Working Group). These included the aging of the workforce (an impending retirement bulge and the need to replace the baby boomer cohort); difficulties in hiring for particular specialties and for particular levels of the organization; wage disparities with the private sector; a mismatch between technological needs and workforce skills; and challenges in adapting to changing demographics (changed attitudes among the young and the “new immigration” in particular). Section III below describes the interview results in this area in more detail.

The consensus about the particular challenges is, unfortunately, matched by a common belief that the industry is better at identifying problems than it is at finding workable solutions. This is not to say that there are not promising approaches being attempted at many properties (Section IV below describes those identified in the course of the interviews). But there is a perception on the part of many thoughtful observers that the industry’s failure to be as successful in addressing workforce challenges as in identifying them reveals systematic weaknesses in its approach to “human capital”. The particular challenges are not just issues in and of themselves: they are also symptoms of underlying problems.

C. There is concern that underlying problems reflect the industry “culture”

Many of those interviewed attributed the industry’s problems in addressing workforce issues to the industry’s culture, which they described as outdated, isolated, and unnecessarily rigid. These observers tended to be the managers who were most successful themselves in addressing workforce issues.
Underlying “cultural” problems identified in the interviews included:

- The industry emphasizes building and running things, not managing people. As one observer put it, to address workforce challenges the industry needs to “make human infrastructure as important as physical infrastructure.”
- Transit organizations generally lack tools and expertise in people management. To take one example, managers seem to lack the tools needed to measure the return from investment in training or other human capital investments.
- With the exception of physical infrastructure, transit lacks a tradition of long range strategic planning (and the tools that would enable such planning to take place).
- There is relatively low status for those on the “soft” side of management (again, an emphasis on physical infrastructure and engineering).
- There is a failure to invest necessary resources in human capital. This is seen as symptomatic of underlying attitudes and incentives: “You can’t cut a training ribbon.”
- There is little circulation of managers outside transit, and hence a lack of personal exposure to, and experience with, more modern approaches to workforce planning, investment and development.

Observers concerned about these underlying issues felt that one of the key objectives of the Initiative should be identifying ways to induce “culture change” in the industry. They recognized that some “rigidity” was inherent in the industry—buses and trains must operate on time; transit must operate within public sector constraints. But, these observers argued, companies outside transit had in many cases successfully addressed similar challenges. They also recognized that many transit organizations had already begun the process of changing traditional practices. Progress on workforce issues could build on successes in other areas.

D. There is universal support for increased cross-industry effort to help transit organizations address Workforce issues

Whether those interviewed focused on particular workforce issues or believed that there were also underlying issues that needed to be addressed, all agreed that in principle there was a role for a cross-industry initiative to help individual properties do a better job recruiting and retaining staff.

The common denominator (universal support, and no skepticism about its usefulness) was support for an ongoing process for exchanging information on best practices and innovative approaches. Possible mechanisms (discussed in more detail below) range from establishing a simple list serve that would allow posting of information useful to others to an ongoing benchmarking program. There was support for even more ambitious programs that might involve APTA-certified demonstration projects. Another innovative option would be to develop an industry wide (perhaps APTA-based) consulting and training function to serve individual properties.
E. There is strong support for ongoing benchmarking

There was universal agreement that the industry needs to know more about how other industries (especially those who face similar problems) have addressed workforce issues.

Outside organizations are open to this, since they themselves practice ongoing benchmarking. Federal Express, Company D, and United have already volunteered to participate in a more detailed benchmarking exercise.

Benchmarking could also serve as a way to encourage “culture change”. By asking transit managers to participate in the benchmarking process (by, for example, asking properties to nominate “high flyers” for participation) future leaders could be exposed to practices in other industries they could emulate within transit.

F. There is strong support for creating ongoing processes and institutions to foster workforce development

The current Workforce Initiative has a limited life span. Unless an ongoing institution (within APTA or elsewhere) is created, attention to workforce issues will slacken. Everyone interviewed recognized this problem. All agreed that one of the most critical—if not the most critical—task of the working group is to design the processes and institutions that can continue beyond the finite life of the Initiative.

Without continuing leadership and high level attention to workforce issues the industry will move on to other concerns. “Workforce Development” will have been the “flavor of the month”, and last month at that. High level attention means that there needs to be a strong committee of industry leaders supporting progress in this area on a permanent basis.

High level attention to the issue by itself is not enough. There also needs to be ongoing support for whatever other processes and programs are recommended as part of this process. A benchmarking program will not run itself.

There is a permanent role, too, for someone who thinks full time about workforce issues: new opportunities for study; new resources needed; new ways of exchanging information; new programs. Without a “thought leader” in charge, any programs begun here will quickly become tired and bureaucratic.

G. There is a widespread perception that Transit faces difficult institutional issues in addressing workforce concerns—but also a belief among many that these should, and could, be addressed

Because it is in the public sector, the transit industry faces institutional issues that private sector organizations need not be concerned with. To the degree that
compensation is a key barrier to recruitment and retention\(^2\), making progress may require changing deeply inbred attitudes.

To some degree these institutional constraints are inherent. But many of those interviewed felt that even in a public sector environment, it was possible to make significant improvements by working actively and skillfully with Boards and local political figures. The interviews uncovered several success stories, where innovative general managers had convinced their Board or political supervisors, through a careful education process, to introduce more competitive compensation, pay for performance and other forward-looking practices.

H. Problems are North America wide and must be addressed accordingly

Interviews with Canadian transit properties revealed exactly the same concerns as in the U.S., as well as innovative approaches applicable in both countries. Anything that comes out of the initiative needs to be fully inclusive of both Canada and the United States.

Institutionally, Canada is a leader in addressing Workforce issues. There is no equivalent of Canada’s Motor Carrier Passenger Council. Simply replicating the Council in U.S., were it possible, would in and of itself represent enormous progress toward addressing Workforce issues.

III. Interview Results—Key Workforce Issues

This section describes in more detail how those interviewed saw the “key workforce issues” facing the industry. While their answers in general were close to those of the Working Group the interviewees added details and nuances to the original list.

A. Aging of the current workforce

- Like the Working Group, the interviewees expressed almost universal concern with the aging of the baby boomers and their coming retirement. For demographic reasons (the sheer number of baby boomers) and reasons unique to the industry (many properties became public in the 1960’s and heavily recruited at that time and into the 1970’s), baby boomers dominate the experienced workforce at all levels of the industry.
- At the same time, the direct impact of an aging workforce raised strong concerns. Several managers worried about rising healthcare costs and absenteeism from their older workers.

\(^2\) And all agree that compensation was a concern at least for particular levels within the organization and for particular specialties: for example, for senior managers and IT personnel.
Like the working group, interviewees expressed concerns about older workers having difficulties working with new technologies.

B. Succession planning

There is a concern throughout the industry that “succession planning”, particularly for top managers, has been weak. Those concerned about succession planning were very often the same observers who saw a lack of strategic planning within transit.

Concerns about succession planning focused on more than just identifying and training future senior managers. There was a sense that the top transit job is changing. Some agencies are now looking for “mobility managers” whose role goes far beyond the traditional “build, run and maintain” model. Observers felt that much more could be done in identifying the competencies needed for this new role, and developing ways of training future managers in those competencies.

One important way to train managers for senior positions—especially when they will be asked to address non-traditional concerns—is to encourage a wider range of job movement and experience. As discussed elsewhere, there was a sense among many of the more thoughtful observers that one of the most serious developmental weaknesses in the industry was its relatively “closed” nature. Few come into the industry from outside at the higher, policy-making levels. Indeed, some observers remarked that there was little interchange among transit agencies and private transit businesses and consultancies—much less interchange with outside organizations. These observers said that the Workforce Development Initiative could make an invaluable contribution by suggesting ways of exposing promising managers to new ideas and practices both inside and outside the industry. (See below for what appears to be a model effort by Washington’s WMATA).

C. Particular problems in recruitment

The interviewees identified several areas which are particular problems in worker recruitment. These include:

- A general problem in recruiting staff outside what are seen as the core areas of a transit organization: designing, building, running and maintaining the system. Professionals in “non-core” areas (administration, IT, marketing, and so forth) do not naturally think of transit as a career option. One suspects as well, consistent with the cultural emphasis within the industry on the engineering side of the organization, that these specialties are at times not as highly valued as others.
- As in other industries, there are difficulties recruiting (and compensating) IT professionals. These problems are easing to some degree with the slowdown in the economy (again as in other industries). Transit is seen, however, as facing special challenges. Several of those interviewed made the interesting observation that the industry’s move toward greater reliance on high technology cuts both ways: it causes problems in training (or retraining) certain workers, but it also makes the industry...
more attractive to high tech workers. That said, the consensus was that the industry would always have difficulty attracting a high tech workforce when compared to more explicitly high tech industries.

- Marketing specialists: Several of those interviewed cited difficulties in recruiting marketing staff. One reason for this (as with non-core specialties in general) is what are seen as superior opportunities in other industries (especially in the private sector, with its often higher and more flexible compensation). The sometimes poor image of the industry also contributes to difficulties in recruitment (marketing for transit may be seen as more of a challenge that some are willing to take on). Company B points to similar recruitment difficulties, for similar reasons.

- Engineers: The industry faces problems here common to other sectors. Engineering enrollments are down sharply among U.S. nationals, creating fierce competition for engineering graduates. Foreign engineering graduates tend to be interested in electrical engineering and other high tech specialties. The combination of competition from other industries, with the decline in interest in civil engineering, led many observers to identify engineer recruitment as a serious problem. The problem is likely, they thought, to worsen with no obvious solutions in sight.

D. Compensation

The Working Group cited several concerns with compensation, and these tended on the whole to be confirmed by the interviews.

- The Working Group felt strongly that wages were no longer competitive. The interviews produced a more varied response, differing from organization to organization, and from job level to job level.
- Thus there were almost universal concerns about salaries at the very top of the organization (this was expressed by all types of transit interviewee, senior staff, board members, trade association employees). Transit salaries are felt to be at the upper end of public sector salaries, but remain low compared to private sector salaries. They will never, of course, match those in the private sector, but, with exceptions, they remain undesirably low.
- The relatively closed nature of the industry may limit the direct effect of low salaries on General Manager recruitment. Because there is very little recruitment outside the industry, and because GM salaries are the highest within the sector, there are in general candidates available now for GM positions. (Of course, for some properties, low salaries can be a problem for GM recruitment). The larger threat, though, is a long term one: lower salaries at the top discourage high achieving individuals from entering or remaining in the industry, causing the quality of the pool to be depressed, even if the number of candidates still remains adequate. And even if the culture were more accepting of recruitment outside the industry, low salaries are a powerful barrier to bringing in new blood.
- Low salaries at the top cause wage compression for upper and mid-level managers. This drives high achievers out of the industry (or discourages them in the first place) and, as with GM’s, makes it difficult to bring in talented outsiders. It can also make it harder, if not impossible, to recruit for certain specialties. More than one of those
interviewed mentioned difficulties in hiring a head MIS manager as a result of pay compression.

- Low salaries are a particular problem in those properties that are part of city or county government. In those cases pay is capped at all levels by general government pay scales. Independent transit agencies, although still facing challenges for particular specialties, and suffering from relatively low pay relative to the private sector, are nevertheless doing well in public sector terms.
- Low salaries are also a particular problem for properties in older parts of the country, which already see employees being recruited away by more rapidly growing cities and regions.
- There are signs of a possible breakthrough in pay at the GM level, with some for example, now closer to private sector levels. Partly as a result, the Houston agency has been able to reduce salary compression and bring in senior managers from outside the transit industry.
- Like the Working Group, the interviewees pointed to a special pay and promotion problem with first level supervisors. Promotion to the first tier of manager can mean an actual reduction in pay as former blue collar workers forego overtime. Some properties facing this problem felt they could address this in part by offering additional perks (use of an automobile for example) or other non-cash compensation.
- A lag in base pay is only the beginning of differences with the private sector. The transit sector, like the public sector in general, lags badly in its willingness (and ability) to offer incentive pay, variable pay, and other forms of innovative compensation. Some properties, however, have been able to introduce bonus and other incentive pay. In order to do so they have had to carefully build political and institutional support, by commissioning studies and working closely with initially skeptical Boards. This option is far easier for independent agencies than those that are part of city or county government (although by no means impossible for the latter—there were several success stories reported).
- Interviewees agree that the key to winning support for variable pay, gainsharing programs and other innovative pay concepts is to tie pay to clear performance goals and productivity gains. This concept was seen as essential to winning Board and political support.

E. **Image problems**

The Working Group identified as one major problem for the industry, a relatively poor image (or, as some said, “no image at all”). The industry was perceived as old-fashioned, slow-growing, and one where work was difficult and boring.

Many of those interviewed agreed that transit had a serious image problem (again ranging from a “bad image” to “no image”). As in the working group, some attributed this to problems inherent to transit (“it’s hard to make a bus ride exciting”; “our work is necessarily somewhat regimented”). Others (especially in systems that were city or
county-owned) pointed to a low (and in their view worsening) image of public employees in general.

Others argued that image is predominately “property-specific” rather than an industry problem. In other words, transit’s image as an industry is far less important than the image of individual agencies. The image of individual agencies depends, for these observers, on how well they deliver effective transportation services. Agencies that were growing (Dallas or Santa Clara, for example) or that had substantially improved their services (New York) reported positive images that made recruitment and retention easier. Other observers also linked “image” to conscious efforts to improve employee morale and workplace conditions. Properties that had successfully improved morale among current employees not surprisingly indicated greater success in recruiting new workers.

There is an important corollary to the argument that “image” depends ultimately on the success of the individual property in delivering its services. Advertising and public relations by themselves cannot improve image. They can communicate improvements and successes if they are real. But an advertising or PR effort in the absence of substantive achievements is useless. Perception depends on reality.

F. Demographic issues

“Demographic” issues include at least three main categories:

Diversity and inclusion for African-Americans and Women

There is a fairly universal sense within the industry that compared to others transit is strong (although by no means perfect) in addressing “traditional” diversity issues. Representation by women and African-Americans is stronger in the upper reaches of transit organizations than in other industries, although all agreed that further progress was still essential (women still lagged in particular it was felt). Some observers felt that one key to further progress was encouraging transit-connected businesses to make as strong a commitment to diversity as transit agencies had made (on the whole successfully).

The “new immigration”

The industry is seen as far weaker in addressing the challenges raised by Hispanic, Asian, and other parts of the “new immigration”. It is recognized as a challenge: all agree “new immigrants” are an important and growing part of transit ridership and of employment pools, in many areas. But (as in other areas) the challenge is recognized without, yet, much in the way of planning or concrete steps to address it.

Little is being done in general (there are exceptions) in the way of language or cultural training in order to make properties more friendly to non-traditional groups. Nor, again with exceptions, are agencies actively exploring ways to reach out more successfully to new immigrants as potential workers. Many observers felt that this was an area where the
industry could profitably invest far more effort. For many immigrants transit jobs would be a step up from current employment opportunities.

**Changed attitudes among younger workers**

Younger workers are often stereotyped as less loyal, more self-centered, and less committed. Many of those interviewed suggested that, with some exceptions, this is simply a stereotype: one common observation was that “advancing age and the first recession” will make younger workers much more like older ones than they now appear.

There are, however, some particular issues where there do appear to be concerns about younger workers:

- At blue collar levels the industry would profit from being able to do a better job identifying and recruiting drug-free, crime-free workers. Several of those interviewed spoke of having to reject 90% of applicants or more for failing drug or criminal background checks. (On the other hand there may be a limit to progress here: FedEx has exactly the same problem, and similar failure rates).
- There is a consensus that academic skills are weaker, again especially at the blue collar level.
- Younger workers have expectations, and needs, for employment-linked services, different from that of older workers. Single mothers need day care, for example. This was an area where some properties have found it possible to make adjustments.

**G. Work organization**

The working group identified an “old fashioned” work organization as a key issue: transit jobs were felt to be “quasi military”, inflexible and rule-bound. Most of those interviewed shared this sentiment.

Many argued (correctly in the view of the report’s author) that to some degree this is inherent in the product being offered. Buses must arrive on time. But some of the more thoughtful observers also argued that this is true across transportation (“airplanes must arrive on time”) yet other transportation companies are far more flexible in their work organization than transit.

There was strong support for further benchmarking in this area (with, for example, Southwest Airlines which was seen by many as a model of flexible work organization in a transportation company).

**H. Technology**

The Working Group identified the fit between increased reliance on technology and workforce skills as one of the most important challenges facing transit. As in other areas, there was strong support for this view among those interviewed, but also some interesting and unexpected variation in opinion.
• Concerns about technology differ from area to area. In high tech areas (SF Bay; Puget Sound, western Canada, for example) agencies report little trouble in recruiting technically skilled workers. In other parts of the country (the older eastern systems, for example) it is a major problem.

• As noted earlier, the industry’s increased reliance on technology helps recruitment and retention for some properties—not surprisingly, with younger workers and with workers in high tech areas. One interesting benchmarking project might be to identify areas where workers respond positively to technology and investigate in more detail the reasons why they do so. This may suggest ways that other properties can use high tech as a job lure.

I. Institutional barriers to workforce innovation

The Working Group identified a number of potential institutional barriers to adopting more flexible, innovative approaches to Workforce issues. These included the realities of belonging to the public sector; a lack of understanding and support at the Board or local political level; and difficulties in dealing with labor.

Those interviewed agreed that these were challenges and that (as in other areas that constrain flexibility) some of the challenges are inherent. Wages in the public sector can never match those in the private sector. The public sector is risk averse for a reason: there is an enormous downside to failure in a non-competitive environment. No other company can enter the market to provide services; they simply are not delivered. (And of course the politicians responsible are directly punished by the voters).

Nevertheless, there was a widespread belief among those interviewed that transit agencies could do a much better job educating boards and politicians about the costs of traditional workforce practices and the advantages of more innovative workforce planning and management. Boards were seen as committed to the success of the properties they managed, but were often inadequately informed and educated. A careful and well planned education effort, that perhaps supported by APTA-led Board education programs, could improve understanding of these issues. One observer suggested the development of a standard package on transit issues in general, with more detailed treatment of special challenges and possible approaches.

Interestingly, labor representatives interviewed argued that resistance to innovation comes at least as much from attitudes at the management level as from attitudes among the union leadership or rank and file. The more thoughtful labor representatives see the same kind of cultural issues identified by the more thoughtful parts of management.

Union representatives recognize that relations between workers and management have often been tense in the past. But they argue persuasively that cooperation between unions, rank and file workers, and management is critical to addressing workforce issues. Both major transit unions have taken innovative steps toward encouraging new
approaches to recruitment, on the job training, and the creation of “career ladders” within transit organizations.

Labor—at least nationally—has already taken the first steps toward building an ongoing, high level process for creating innovative approaches to workforce recruitment, training and retention. They express a strong desire to work with national and local transit management on these issues. The existence of these labor initiatives is one of most encouraging signs, in the author’s view, for the success of the Workforce Initiative. It represents a promising avenue for institutionalizing a successful process. One of the key steps the Task Force should take is to engage with Labor’s effort to jointly address the issues covered in this report.

J. Training

Many of those interviewed singled out improved training as key to workforce recruitment and—especially—retention. In addition to adapting workforce skills to organization needs, training programs are an important fringe benefit to many workers.

Training is an area where transit organizations have been active and innovative. (Although at least one person interviewed bemoaned a tendency in his agency to see training as the “first item to be cut” at times of budget stringency. He is probably not alone in having this experience.)

An interesting question is how transit compares to other organizations in the skill and sophistication with which it approaches training. Only two of the properties interviewed had explicit training strategic planning processes (Houston and Santa Clara). Given the importance that American business places on ongoing training, it would be an interesting future project to determine how transit training budgets, planning and programs compare to that of other sectors.

Training is also one of the areas of particular interest to transit Labor. Labor is especially interested in ensuring that training is provided imaginatively and regularly to existing workers as well as new recruits. This is an area where management can fruitfully work with Labor to create cooperative projects that benefit both workers and transit agencies.

K. Planning and failure to plan

- A number of interviewees argued that the industry in general does not do an adequate job of predicting, identifying and—most important—conducting the planning needed to address workforce issues. More than one added that this reflected a general lack of strategic planning in the industry. Supporters of better strategic planning argued that the industry needed planning training, and better planning models and tools.
- Several interviewees argued that the industry often failed to look at the costs of turnover in a “holistic” fashion. The total costs, they argued, of turnover and
recruiting, was likely to be greater in many cases that offering higher compensation in order to retain staff. They attributed this failure to short-sighted attitudes and to the absence of planning training and adequate tools to calculate the full costs of turnover.

- There are promising signs, however, that comprehensive and thoughtful planning is becoming more common in the industry, including on workforce issues. WMATA, for example, appears to have a carefully designed workforce planning process.

IV. Promising approaches to workforce recruitment and retention

This section again describes in more detail what interviewees saw as promising approaches within their organizations to addressing some of the key workforce issues. I have keyed the responses to the particular workforce issues identified as key challenges.

A. Aging of the workforce

Despite the very strong concerns expressed about the impact of an aging workforce (wave of impending retirements, inadequate succession planning, and a feared rise in health and absenteeism costs) interviewees pointed to little concrete that was now being done to address these issues.

Some properties (Champaign-Urbana for example) are trying to reconfigure some of their work to allow part-time work for which they recruit older workers, including persons retired from other professions.

B. Succession planning

This is widely recognized as a serious issue but with one exception the study found no examples of special programs to address it. WMATA (Washington, D.C.) has an explicit “Leadership Succession Planning Program” that targets ten key positions. Potential candidates for these positions are rigorously screened in order to become eligible for training, special projects, and rotational work assignments. A special Superintendent Succession Planning Program for Operations has also been developed to address the agency’s need for Superintendents due to forecast retirements. The purpose of this program is to select and prepare ambitious individuals for Superintendent level positions. Significant attention is being given to preparing participants with technical and management skills. A second stage in the current program is to begin next year, with the pace of the program being accelerated to address pressing succession issues.

C. Particular problems in recruitment

Interviewees suggested a number of interesting approaches here:
Two of those interviewed suggested that the industry explore a program that would encourage persons with specialties not needed permanently at any particular organization to be able to move as needed to other properties. Specialists in “tunneling” are an example. In order to accomplish this, the industry would have to set up mechanisms for transferring pensions and other benefits. This is a good candidate for future study. One model, suggested by Bev Scott, would be to look at the program that allows city managers to move from city to city.

BC Transit has addressed labor shortages in particular specialties by creating an ongoing process to consider institutional or process changes that could reduce or eliminate the need for those skills. Every change in the workforce (a promotion, for example) is looked upon as an opportunity for work reorganization. Equipment practices might be changed: engines, for example, might not be rebuilt, but could be “swapped out” or leased. Or the work itself could be re-organized: high level mechanic skills could be contracted out, and the number of semi skilled or apprentice position could be increased. The key to achieving gains is not the particular innovations, but a philosophy and practice of constantly looking for opportunities for change.

The RTD in Denver addressed a bus driver shortage by creating an integrated recruitment plan that included a million dollar radio and TV advertising campaign and targeted outreach to technical schools. The system also provided finder’s fees to employees who recruited new operators (other systems have introduced similar finder’s fee programs).

Denver also provided end of year 10% bonuses to engineers, IT personnel and planners—all scarce specialties in its area.

King County, also in need of drivers, built a campaign around bus operation as a part time second career (“Make a first step in a second career”).

D. Compensation issues

There is significant progress, in a number of organizations, toward addressing compensation issues.

The problem with first tier supervisors facing reduced or only slightly increased pay is being addressed in some properties with increased perks: Take home vehicles, free cell phones, safety equipment.

LA has introduced a new pay for performance system for its non-union staff, starting July 1. The new system replaces a traditional approach that provided standard cost of living adjustments. Getting authorization for the new system required long planning and rigorous study of approaches in other transit and governmental organizations. The studies were conducted by internal staff, not outside consultants.

Santa Clara conducts regular salary surveys in its area for in-demand specialties (engineers are a particular focus, as are IT workers). It conducts the surveys internally.

Santa Clara has also reached agreement with its unions to review certain specialties on a three year rather than five year basis, and adjust pay to match the market.
Santa Clara has addressed the serious housing problem in its region by setting up a $500,000 to $1 million revolving loan fund to cover the cost of apartment deposits. On a temporary basis, 60 to 80 employees at a time have been allowed to live in campers on organization-owned parking lots. The GM serves on the local housing leadership council and has set up a joint housing task force with its unions.

Santa Clara has also instituted a program to provide $2000 loans to staff to buy computers. The aim is to encourage greater computer literacy among employees at socio-economic levels that otherwise would not typically afford a home computer.

MARTA has adopted a program that provides bonuses ("success sharing") for organization-wide performance.

Houston has a gainsharing program as well, with union as well as non union employees eligible. In the most recent cycle, each employee received $1300 in bonus compensation based on meeting performance goals. Tangible rewards for corporate performance are seen as highly motivating, and create a mindset that is committed to organizational goals and increased efficiency.

WMATA has introduced a new market-based pay system which WMATA’s Compensation Branch will update regularly, based on market surveys and data. WMATA has also instituted Pay for Performance for non-represented employees (as of 1997), linked to a new Performance Management system.

New York’s MTA has turned its compensation challenges from a disadvantage to an opportunity. For certain hard to hire skills (legal, IT, finance) MTA hires young, bright graduates, expecting them to stay only 3 to 5 years, but compensating them through much greater responsibility than they would have elsewhere. As a result, they can hire bright graduates without having to increase wages to private levels.

E. Image problems

Santa Clara believes strongly in the principle that each property “creates its own image”. It has therefore developed an ongoing effort to reach out to workers through regular meetings, attendance at informal functions, and other mechanisms. By focusing on worker involvement, workers feel more committed to the organization. Pride in the organization translates into an improved image.

King County and Santa Clara both encourage bus drivers to take part in community projects. King County has 10 to 12 drivers each year do community projects with a transit focus (for example, a community partnership program on “how to be safe on the bus.”)

There is strong support among those interviewed for (PT)², the industry’s overall effort to improve transit’s image.

F. Demographic issues

LA, which wanted to increase its recruiting among Hispanics, developed partnerships with three “Employment Development Districts”. LA worked with them to develop a program to educate applicants on how to fill out an application form and do a job interview. (LA needs to hire 25 operators a week and to do so must get 250 to 350
applicants: the others fail to pass physical, criminal record check, or drug or alcohol tests).

- Champaign Urbana has tried to tailor its schedules and assignments to take account of the needs of part-time workers, including single parents.
- The Amalgamated Transit Union (ATU) has supported efforts to use Federal welfare to work funds to train in transit-related skills.
- ATU developed a training program in both Spanish and English in 1992 to ensure that its members could pass the CDL exam, with a claimed success rate of 100%. It sees this as a possible model for future cooperative labor/management programs.

G. Work organization/Cultural change

Several organizations have instituted programs that are designed to change traditional patterns of work organization. Some of these are aimed explicitly at changing the internal culture.

- The SEPTA’s customer focused training program, described below is designed to improve organization image and foster internal teaming.
- King County has also initiated a “team” based approach to workforce organization. This has improved workforce satisfaction, which in turn is good for image and recruiting.
- King County has sent its management staff (especially those seen as “high flyers”) to area wide leadership training with Boeing, Nordstrom’s and Microsoft.
- King County has brought in Nordstrom’s managers as examples of progressive management for presentations.
- King County’s annual management retreat is regularly built around speakers that are designed to challenge the existing culture (a futurist, the management team at the Pike Place Market, Nordstrom’s).
- WMATA has retained a consultant to partner with the agency as it embarks on its major culture change initiative. Monthly meetings are held with Executive Officers and Directors, and quarterly meetings are held with all management staff. Industry leadership speakers make presentations at the meetings. In addition, a Joint Management Committee, comprising Executive Officers and seven Office Directors, has been formed to act as a resource and sounding board for issues surfacing in the organization.

H. Technology

- BC Transit involves mechanics and bus drivers in creating the specifications for new buses, with the expectation that new technology will be more familiar and user friendly.
- Louisville has an even stronger program. For their most recent equipment purchase, Louisville trained several of their mechanics as bus inspectors and sent them to work two week stints on the manufacturer’s assembly line. The project had two goals: to familiarize the mechanics with the good work habits of the bus manufacturer, but
even more so to make sure the mechanics had ownership of the new equipment. The GM felt the project had been a success when he overheard a mechanic saying about one of the new purchases: “That’s my bus.”

I. Institutional barriers

Several of those interviewed described long processes of working with Boards to increase their understanding of workforce issues. These observers urged strongly that the Workforce Initiative consider ways of supporting such efforts through industry wide information exchange and the development of educational materials.

One union representative felt that the industry had been relatively slow in developing cooperative relationships with labor to encourage better workforce training. He urged that the industry consider opportunities to work with unions and others to develop training initiatives and to reach out to non-traditional groups. In order to break down barriers between unions and management, he suggested that it might be worth considering facilitated third party brainstorming on areas of potential cooperation.

J. Planning

Despite the industry’s general weakness in this area, there are interesting current models for strategic planning, including in workforce development

- Houston has completed strategic plans for technology, IT and HR.
- Houston is now working on a strategic plan for recruiting, in cooperation with the Texas Southern Railroad.
- WMATA appears to have both a comprehensive and a specific workforce strategic plan. It may be potential model for other systems considering more advanced planning.
- Santa Clara’s ongoing training planning process has already been noted.
- Several of those interviewed recommended that the Workforce Initiative have as a key recommendation that transit agencies “have a people plan with any strategic plan”. The Initiative also needs to lay out how the tools and training can be provided to make this a reality.

K. Building partnerships with others

Canadian transit systems in particular have been active in forging partnerships with others in government and outside to address common workforce issues.

- The Canadian transit industry has helped found a Federal level “Motor Carrier Passenger Council.” The Council, discussed in more detail below, has examined retirement trends, and studied how better to attract applicants. It has completed a study of needed competencies and is looking at a professional certification program.
BC Transit has initiated a joint effort with other Crown Corporations (quasi-public entities) to discuss workforce issues. While the planning is at an early stage, they are discussing sponsoring a targeted scholarship plan in areas of common concern.

LA works closely with other city agencies to identify common issues and exchange ideas on possible approaches.

The TWU has founded a “Community Transportation Development Center” focused on building what the AFL-CIO has called “high road partnerships”. These partnerships bring together management and labor in individual properties to create “career ladders” and training opportunities. The TWU is very interested in coordinating its activities with APTA and the Workforce Development Initiative.

New York’s MTA is working closely with local technical schools to improve their ability to act as talent “feeders” to the agency. The MTA’s goal is to eventually recruit as many as 1/3 of its blue collar staff, in some specialties, from the city’s technical schools. MTA has, for example, worked with the school system to develop training in elevator and escalator maintenance.

I. Training

As noted above, several organizations have well developed training programs which they see as critical to recruitment and retention.

- Santa Clara has a training plan for each initiative and program.
- Santa Clara tried to ingrain training as part of the culture by instituting a regular planning group and input process with representation from all departments.
- Santa Clara has instituted a two year mechanic certification program. In return they require a 4 year commitment to the organization.
- Houston uses its overall strategic plan to set its training budget. They set competency levels, then determine training budget by department, based on the needed competency levels.
- SEPTA has held a series of “customer expectations” trainings to shift attitudes and make staff more customer focused. They believe that the training helps improve the organization’s image, as well as building more of a sense of team focus within the organization.
- WMATA has major training initiatives in at least six areas:
  - “Challenge to Leadership” a new middle management course that all Executive Officers and managers are expected to complete by the end of 2001.
  - A core curriculum management training course, with a certification program to be in place for 2002, for directors, managers, supervisors, and potential supervisors. Certification will be a prerequisite for promotion.
  - A Management Trainee Program—a one year introduction to management for entry-level professional career candidates.
  - Technical Skills Program for Elevator/Escalator Maintenance Trainees—a two year program that prepares trainees for entry level Elevator/Escalator or High Voltage Technician positions.
- Technical Skills Program for Rail Car Maintenance—a two year program that combines formal training for Rail Mechanic Helper classifications (including equipment certification) with structured on-the-job training.
- Technical Skills Program for Bus Maintenance will prepare maintenance trainees to meet the objectives of ASE Medium/Heavy Truck Specification, launching their careers toward ASE Master Technician Certification.
- Several organizations have instituted “mentoring” programs for bus drivers.
  - Salt Lake’s program keeps new drivers under the same supervisor for his initial period.
  - The program also brings the drivers’ spouse in for orientation.
  - The program sponsors weekly “huddles” for new bus drivers.
  - Turnover has been cut from 27% to 21%.
  - Houston’s program provides an experienced mentor for each new driver for the first six months.
  - Mentors receive an extra hour’s compensation a week.
- The spread of mentoring is an indication that current mechanisms for information exchange within the industry work—and work quite effectively—in some cases. Louisville’s program, for example, was set up after manager’s learned of similar programs at an APTA conference. A closer look at what is now working, and why, should be part of the Workforce Initiative’s follow-on activities.

V. **Benchmarking Results**

The study interviewed seven “outside” organizations (five of them outside firms, one of which (Company C) is a private contractor of transit services). In order to preserve confidentiality, we have not identified the business respondents by name.

A. **Company A**

Company A is a private sector transportation company. It faces many of the same problems as the transit industry and for that reason alone is an excellent candidate for regular benchmarking. In addition, however, the company regularly engages in benchmarking with other industries. It has expressed a willingness to cooperate on an ongoing benchmarking exercise.

In its view, the company recruits, especially at the blue collar level, from the same workforce pool as transit. Like transit agencies, the company faces serious problems in recruiting a well-educated, drug-free workforce with a clean record.

Unlike some in transit, however, Company A feels it has been relatively successful in recruiting workers. It has been able, in the company’s words, to “make themselves an employer of choice”.

Company A attributes its success in doing so to a number of factors:
The company has an ongoing workforce planning process that allows them to carefully design a combination of recruitment, compensation, and benefit techniques in order to maximize recruitment and retention.

They have designed their work in such a way that they can recruit part time and night workers where appropriate (their business depends heavily on night time workers). They offer these workers the same benefit package as full time workers.

They have competitive but not unusually high hourly pay rates.

They offer strong benefits: rich medical, good retirement and profit sharing.

They promote from within, including offering part timers opportunities to join the full time staff.

They have just put in a new web-based hiring site that received 800 applications in its first 28 hours of operation.

B. Company B

Company B is an independent public sector transportation company. Like Company A, Company B faces many of the same issues as the transit industry, but with the interesting twist that B’s problems tend to replicate transit’s white-collar challenges. B faces image problems; it has serious difficulties hiring marketing and IT personnel; it suffers from a generally poor attitude toward government and public entities. It has had some—but not dramatic—success in addressing these issues.

Company B’s human resources efforts are notable for one innovation that should be transferable to the transit sector: Company B has explicitly created a system for measuring the returns to the organization from training initiatives. As noted earlier, a lack of models and techniques for measuring the return from HR initiatives is a pervasive weakness of the transit sector. Company B’s system is a good candidate therefore, for further benchmarking analysis.

C. Company C

Company C is a private company that operates rail transit systems for public agencies. As a private (and non-union) company it is able to be more flexible and innovative than most transit agencies. While not all of its innovations may be transferable to the more constrained environment, it is an almost ideal benchmarking example because it performs exactly the same functions as a conventional transit organization but in a different institutional environment.

- Company C practices extensive development training of its work force. Conductors qualify as engineers and then as train dispatchers. This provides a career ladder for employees.
- Company C operates a similar training and development ladder for laborers, foremen and track inspectors.
- It addresses, like many, the gap between workforce skills and technology through constant training. Longer term “core” workers act as mentors for new hires.
Managers have far greater pay flexibility than in unionized, public organizations. Managers are held to performance standards, but are free to provide spot awards (cash, gift certificates, watches, jackets) to reward strong performance. They are also free to make modest but real adjustments in base pay for high performers (the manager I interviewed made one staff member the “captain of the cleaning crew” for an extra $1 an hour, for example).

Pay in general is higher, but only a bit higher, than in transit. Rewards for performance and pay flexibility, not sharply higher wages, are seen as the key to better performance and higher morale.

D. Company D

Company D, a private transportation company, faces problems similar to transit—in some ways more intensely. Pay is modest ($32,000 average for an inter-city bus driver) and working conditions are difficult (drivers often must spend long periods away from home, and work long hours—70 hours a week at times). The company has shown considerable imagination in addressing workforce recruitment issues, and is a promising benchmark candidate. Company D management has expressed a willingness to participate in further benchmarking.

- Company D pre-screens applicants to increase the number of ultimately successful recruits. Nevertheless of 2000 to 3000 pre-screened applicants, they may be able to accept 800 (still a better ratio, apparently, than that of other benchmarks or many transit agencies.)
- Company D has followed what it describes as trucking industry practice in doing “recruiting on wheels”. They take a good-looking bus, with an experienced driver, and park it at sporting events with a recruiting banner on the side. Potential recruits are invited to inspect the bus, try out the seat and controls and talk to the drivers and recruiters. They often focus on events (e.g., the Super Bowl) where there are many bus drivers from other firms present in enforced idleness. They also take the recruiting bus to shopping malls and other places where they can expect people to gather.
- In addition to newspaper and radio advertising they advertise in retail giveaway packs and “ValuePaks”.
- Like transit, they identify and work with groups that may represent potential drivers: church groups, NAACP, the Urban League. This is especially important to them given their desire to recruit a workforce that reflects their clientele. They provide, too, incentive bonuses to employees who recruit others.
- They are now about 50 or more percent minority in terms of total workforce (up to 70% in some terminals), but feel a need for more emphasis on recruiting Hispanics and other Spanish-speakers. They are actively recruiting employees with language skills.
- They are extremely serious about training. All new drivers go through a seven week training course. The course includes four weeks of combined classroom and on the road training, led by skilled former drivers. This is followed by three weeks of on the
road training. There are written and practical tests at the end of part of the course. The tests are serious: candidate can, and do, wash out.

- They have moved in the direction of greater pay flexibility, with the cooperation of their union. They provide pay incentives in less desirable markets; for customer service; for on-time driving.
- They are religious about involving employees in equipment specification and purchase. Drivers have helped design their new buses, including the seats, instrument panel and driver’s area lay out.
- They have induced drivers (much like some transit properties) to overcome computer anxiety by tying pay record keeping to regular computer based reports. Drivers must punch in work time and other data at terminals—hours are paid for only if drivers have actually done so by computer.

E. Company E

Company E is especially concerned with its white collar workforce, particularly in the areas of succession planning and job shortages in certain critical areas (IT and Finance for example).

- Company E has an explicit succession plan covering its top 200 positions. The plan emphasizes diversity, among other factors.
- Company E has an ongoing “change management” process. This involves training employees in new attitudes (“customer focus”), procedures, and technologies (“ticketless” travel). Company E finds that change management efforts typically confront a fairly standard mix of employee attitudes: “20% are open and favorable, 60% can go either way, 20% are actively hostile.”
- They have recently added a high level HR position focused entirely on retention (they had previously had no one specializing specifically on retention). The new employee will develop a company-wide retention strategy.
- Company E is developing a new HR strategy that will be completed in about a year. They are open to a new benchmarking exercise with APTA once the strategy is completed.

F. TWU/Community Transportation Development Center

- The Transport Workers Union has created an affiliated “Community Transportation Development Center” to focus on developing:
  - A transit and other passenger transportation industry strategy on workforce issues.
  - A public policy agenda supporting workforce development.
  - Joint projects on workforce development with individual transit and other organizations.
- The TWU work grows out of an AFL-CIO project on “High Road Partnerships” to bring together management, workers, and community groups to address changing technology, training, and recruitment.
- The TWU goals with this project include:
- Increased understanding of transit technology and changing job and skill requirements.
- Exploring ways to integrate technology, jobs and skills, and supporting initiatives to implement these new skills in transit agencies.
- Developing and implementing a skills assessment in at least three systems.
- Expanding dialogue and cooperation among unions, workers, management, community groups and secondary and post-secondary education.
- Developing a curriculum for two major occupation skills sets corresponding to new technologies or skill shortages.
- Pilot testing the new curriculum.
- The Union is interested in ensuring that current workers receive training and career growth opportunities, not just potential new recruits. They are very interested in the creation of “career ladders” for the blue collar workforce.
- Like most of those interviewed with transit management, they are deeply concerned about the changing demographics of the workforce.
- The TWU and the Center are interested in an ongoing relationship with APTA and the Workforce Development Initiative, as well as with individual properties. They are concerned about a possible lack of continuity in high level interest in workforce issues. They share the concern of many of those interviewed within transit management that the focus on these issues not be “flavor of the month.”
- They see the unions as a group that can have a longer term focus on workforce development issues than APTA or local management may be able to maintain.

G. Motor Carrier Passenger Council of Canada.

The Council is a Canadian Federal Government-supported entity with participation from all parts of the Canadian passenger bus industry (both transit and intercity). “Human Resources Development Canada” (an umbrella agency that appears to combine elements of the U.S. Labor Department with responsibility for immigration) has a program for supporting industry councils that conduct workforce research. This Council is one of its projects. The Council is funded for five years, in cooperation with industry.

The Council has a very small full time staff, essentially an Executive Director with an assistant. Projects are conducted by consultants, with full participation from industry, labor, government and other stakeholders. For each project, the Council puts together a steering committee of Council members to conduct the project.

While the institutional structure and government support may not exist in the United States for creating a similar organization, the types of research being conducted by the Council, and its cooperative nature, make it a very attractive model for the Workforce Development Initiative. The Council’s projects may also be attractive models for the Initiative. The Council’s work to date suggests that modestly staffed organization, with volunteer industry leadership, can do significant research as well as suggesting promising approaches to workforce issues.
The Council has adopted a five year business plan. Among the projects already completed by the Council, or planned, are:

- National occupational standards for professional bus operators (the ultimate goal is a certification program).
- A project on bus driver recruitment that would provide a national framework for effective recruitment. This would include support for skills resources planning; a framework for a “skills foresight analysis” that will give employers local market data; means and measurements for attracting new entrants.
- Work with Canada’s Natural Resources Council on a training course to improve fuel efficiency.
- A study on identifying and addressing labor shortages and possible apprenticeship approaches to addressing labor needs. The study will examine workforce needs; demographics; and apprenticeships as an approach.
- A project on providing career information on careers in transit.

VI. **Expectations and desired outcomes from the Initiative**

Not surprisingly, interviewees expressed a range of expectations for the Initiative. As noted earlier, support was universal for a more vigorous program of information exchange. There was similar support for institutionalizing workforce development in order to ensure that the momentum of the Initiative is not lost and to manage new programs. Focused research and the development of new tools and models also received widespread support.

Beyond the areas of universal support there were a number of more ambitious suggestions—those that would explicitly encourage culture change, increased circulation of promising future managers, and the development of programs for Board education, for example.

At this stage in the process, it makes sense that all options be considered, with further exploration and investigation a focus of the next stage in the Initiative. The next section suggests how the Workforce might want to organize those next steps.

Suggestions for outcomes of the Initiative include:

A. **Develop and sponsor courses**

APTA could:

- Provide instruction in:
  - HR planning and strategy
  - Long term and strategic planning in general
  - Diversity
  - Compensation
- Develop courses in languages or skills to assist in reaching out to new immigrants.
- Develop a catalog (updated, online) of available courses and resources in all areas that affect recruiting and retention.
- Courses could be taught by APTA staff, outside consultants, and/or “best practice” APTA members.

B. **Develop an “in-house” consulting function on Workforce issues**

Several of those interviewed complained that the industry is too specialized for there to be adequate consulting resources to assist on HR issues, including planning, training, and other retention and recruiting issues. An APTA, or other industry-wide instructional program could be supplemented with consulting services. This would allow the tailoring of general instruction and training to individual needs (more than one of those interviewed wanted the option of having the training “brought to them” rather than available at a distant location).

C. **Ongoing benchmarking**

There is universal support, as noted, for an ongoing benchmarking effort with examples inside and outside the industry. Most of those interviewed have already indicated a willingness to participate in such an effort. A number of other candidates have also been suggested (Southwest Airlines; Disney; private railroad countries; others with experience in providing non-monetary compensation).

Detailed development of a benchmarking program, including one or more actual projects is an obvious next step for the Initiative.

Several observers suggested that the program be designed in such a way that promising younger managers from individual properties be part of the benchmarking team. This would expose them to ideas and practices outside transit.

D. **Improved information exchange**

APTA now provides forums for information exchange, sometimes quite effectively (see the mentoring discussion above). APTA is especially strong at providing information interchange for Board members and senior staff. Interviewees suggested the following additions:

- An accessible list serve on best practices.
- An active program to identify and publish reports on best practice examples.
- A larger program of conferences and seminars, carefully designed not just in terms of content but also so as to attract persons at the appropriate level of the organization.
- Encouragement of informal groups of persons facing similar issues. To encourage frank discussions, these might be by invitation only.
- A “Speakers Bureau” or clearinghouse for ideas of interesting speakers (see the King Country experience with Nordstrom’s discussed above).
• A central point for off the shelf information on workforce trends. There might be an associated staff position knowledgeable about workforce issues.
• A central point or clearinghouse for consolidating information, emerging trends, and concerns from industry HR staff.

E. Models

Several interviewees wanted the industry to develop or identify models that they could use in their own programs or planning.

• Models measuring the return to training or other HR investment were a frequent request.
• A program that would certify and then follow closely particular “model” initiatives as “industry initiatives”

F. Studies on particular issues

• A study that would identify transit specific jobs:
  • Map key competencies for those jobs.
  • Suggest training approaches.
  • Determine recruitment and retention trends.
  • Suggest productive approaches to recruiting and retention.
• A study on the portability of benefits for specialties in occasional demand.
• Long and short term projections of workforce levels and demand.
• A study on what trends are workforce wide and which are specific to transit.
• Studies on job sharing, innovative approaches to older and emerging workforce issues.
• A blue ribbon panel on how the industry could be “de-regulated”, i.e., what steps could be taken toward running transit organizations on a model closer to that of the flexibility and relative independence of private firms.

G. Training

• Work with the unions and others to develop training models combined with workforce development models.
• Explore ways to work with government and others to provide transit oriented training to particular populations (new immigrants, welfare to work recipients).
• Consider mentoring programs that would exchange personnel between transit agencies and private transit supply companies.

H. Collective programs to get the young to look at opportunities in transit

• A common website.
Common advertising, or common advertising themes.
• An advertising campaign that would explicitly rebut the belief that transit is “low tech”.

I. Develop forums for information exchange at the appropriate level

• Encourage state associations as a forum for discussing local issues.
• Explore regional information exchange

J. Develop an ongoing structure for workforce development

This key recommendation needs to be thought through carefully and is a critical part of the next stage of the initiative. Initial suggestions include:

• In order to be effective there needs to be institutionalization at several levels: the GM level, among senior HR staff in APTA members, within APTA, and perhaps elsewhere.
• There almost certainly needs to be a permanent staff person or persons coordinating the ongoing Initiative (several observers suggested someone from outside the transit industry).
• There needs to be regular and ongoing efforts to highlight the most important issues and initiatives for GM's and Board members.
• Consider mandating consideration of workforce implications for every APTA committee and initiative.
• Consider an ongoing committee, perhaps with alternating business and transit chairpersons.

K. Educating Boards and Political leaders

• Produce a model background package on transit and key issues for Boards.
• Involve Board members in Workforce Issues at the APTA wide levels.
• Exchange information on best practices in working with Boards and political leaders.
• Exchange best practices in building support among business leaders.
• Set up an ongoing regular high level process, with Board member representation, to “think outside the box”. Part of this could be bringing in business leaders from outside the industry.

L. Image

• There was strong support for (PT)².
• Image improvement was suggested as an appropriate subject for one or more benchmarking studies.
VII. **Suggested next steps in the Initiative**

From the outset the Working Group has felt strongly that the Initiative needs to prepare an Action Plan for the industry on Workforce Issues. The interviews suggest that there is potential support in the industry for such a Plan. To win acceptance, however, it must be carefully designed and then “sold” to the industry through a process of extensive consultation.

This report recommends, therefore, that the Working Group proceed on six fronts:

- The Group should conduct a follow-on process that would flesh out in detail the structure, role and responsibilities of a permanent Workforce Development process within in the industry.

This process needs to address at least the following issues:

- What on-going responsibilities would be part of this process? The interviews suggest that there is support for:
  - A regular benchmarking program.
  - A clearinghouse function on best practices; HR trends.
  - An ongoing study program.
  - A process that would continue to keep Workforce issues “front and center” through both high level involvement and ongoing study, programs and “evangelization”. This is likely to require a highly placed staff person taking the lead on a permanent basis.

- What other functions might there be immediate or future support for?:
  - A consulting function
  - Board education

- How should the ongoing process be structured?:
  - What parts should be within APTA?
  - What staffing needs are entailed? What qualifications are needed for the staff?
  - How can high level participation be ensured (as with a permanent committee for example)?

- What sorts of forums and other means of communication and information interchange are necessary (meeting, conferences, informal groups)?

- What relationships with others might need to be strengthened or formalized (e.g., with government as in Canada, with labor unions; with other parts of the public sector; or others in the transportation industry)?

- What existing models might there be for the transit industry? Both the Canadian Motor Carrier Passenger Council and the TWU’s Community Transportation Development Center should be studied in more detail to determine the degree to which they might serve as models. Both are also very promising ongoing partners for the APTA effort.
The Working Group should produce a straw proposal that would describe the permanent function in detail, lay out the necessary steps in establishing the function, and provide cost and budget estimates. It should aim to complete the straw proposal within six months (or three months after the APTA Philadelphia Annual Meeting).

- At the same time that the Working Group is developing the nature and structure of an ongoing Workforce Development process, it should conduct high profile research in those areas where there is clear support from those interviewed. Candidates include:
  - A report on one or more external benchmarks. These might be projected as part of a new annual series, and represented to the industry as such. The Group might also want to consider how others in the industry could be brought into benchmarking process (helping for example in designating the topics to be explored in benchmarking).
  - Further study on how information is now effectively exchanged in the industry (a case study on mentoring for example).
  - Do a best practices study on an area of key interest, as for example, new approaches to compensation.
  - A competency study on one key industry specialty.
  - A catalog of potential workforce development resources.
  - A study on available models for measuring return on Workforce Development investment (training for example).

- Given the importance that many of those interviewed put on changing the internal culture of the industry (particularly those who felt strongly about the need for a stronger focus on human and Workforce issues), the Working Group should consider a project to further explore the need for and desirability of “culture change.” This could take the form of a series of outreach sessions, high profile roundtable, or a study. (It might make an ideal topic for one of the “attention grabbing” roundtables the Working Group has discussed).
- The Working Group should work with the two major transit labor unions to determine if there are opportunities for creating joint projects addressing workforce issues. At the least, an ongoing process for consultation and exchange of ideas should immediately be initiated with the labor representatives already working on these issues.
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- The Working Group should consider whether there are ways to enhance cooperation with the Canadian Motor Carrier Passenger Council from across North America.

- On a somewhat longer term basis the Working Group could undertake one of the other widely supported initiatives, for example:
- Develop a model course on HR planning
- Set up a list serve for exchanging ideas on trends and best practices

Before it can go forward in any of these areas the Working Group needs to:

1. Decide in principle which options it wishes to pursue
2. Develop a study plan for each
3. Find resources to support the study plan
4. Decide on how each of the follow-on initiatives is to be managed (the author recommends dividing the Working Group into a series of subcommittees with each having responsibility for a single follow on project)
5. Decide on an overall timeline and deadline for each individual project
6. Determine what additional support or involvement may be needed from other APTA members
Attachment A: Listening/Action Sessions


2. Report given at the Marketing and Communications Committee Meeting (in conjunction with the Marketing Seminar), February 21, 2001, Atlanta, GA. Attendees: Public transportation personnel involved in marketing, communications, media relations, advertising, planning, research, service development, and customer service.


4. Commuter Rail Conference, April 1, 2001, Seattle, WA. Attendees: Commuter rail board members, senior executives, middle managers, officials currently running or interested in starting a commuter rail system, and suppliers/consultants.


6. Rail Transit Conference, June 12, 2001, Boston, MA. Attendees: Rail transit system personnel, board members, policy makers, suppliers, consultants, and other personnel involved with rail and fixed guideway design, construction, operations and maintenance.


Attachment B: Key issues as Identified by the Workforce Development Initiative Working Group and Listening Sessions

1. Aging of the current workforce
   - Long term problem: need for replacements (a problem for the future)
     - Succession planning vital
   - Immediate problem: Lack of flexibility and skill in addressing new technology
   - A signal of other problems in recruitment
2. Changes in expectations for workforce/nature of job
   - Need at top for broader perspective and thinking
   - At all levels, increasing need for understanding of technology
3. Declining interest in transit as a career/poor image
   - “Stability not growth” compared to other industries
   - Poor image (some say no image at all)
   - Difficult working conditions/uninteresting and boring work
4. Compensation issues:
   - Level of wages may no longer be competitive, especially given relative unattractiveness of the jobs
   - Poor wage structure—Civil Service model (high average, poor at top)
   - Wage structure makes it hard to move into lower ranks of management
5. Increased competition from other employers because of the image, compensation, and other problems of the industry
6. Increased dependence on technology yet poor fit with workforce skills:
   - Mismatch between needed skills and workforce skills
   - Lack of planning for introduction of technology—not designed to be “user friendly” (probably not adopted as part of overall comprehensive plan sensitive to workforce issues)
   - No workforce participation in adoption
   - High turnover rate in tech positions; partly driven by desire for new challenges
   - Training and investment need funding, institutional support
7. Old fashioned work organization
   - Quasi military
   - Heavily unionized
   - Traditional union emphasis on rules and seniority make flexibility in terms of training, pay and practices difficult
   - Often reinforced by politics or statute
8. Changes in expectations of younger generation:
   - More tech oriented
   - Different attitudes toward the work versus security trade off
   - Less content with hierarchy: Both unions and the quasi-military organization of much of transit are alien to them
9. Problems in matching needs with changing workforce:
   - Language issues with new immigrants (e.g., Hispanics in south)
   - Reading and other skills of younger workforce
10. Problems with drying up of traditional recruitment pool
Military
Traditional unskilled and semi skilled work force.

11. Political and other barriers exist to solving problem
- Politicized environment
- Reduces pay, work rule flexibility
- Unionized
- Need to determine how much freedom for change there is politically
- Study and recommendations need to take political (and other) realities into account

12. Diversity:
- Often have diverse workforces
- Haven't fully addressed all diversity issues (e.g., meeting immigrant needs in order to take advantage of an attractive pool of potential workers)
- Commuter rail seen as having a greater diversity challenge than bus and urban rail

13. Lack of research on:
- What is the baseline human resources profile of the industry?
- What are the key positions?
- What are the key competencies?
- What are the key pipelines now for providing these resources?
- How bad the problem(s)? What evidence?
- Turnover rates
- Problem by specialty?
- Trends: is it getting worse?
- What is happening in blue collar workforce generally?
- Technological evolution of industry and implications for workforce
- Benchmarking; how others are addressing compensation, demographic changes, technology, recruitment, etc issues.
- Railroads
- Express companies
- Other government or quasi-governmental agencies (are there more successful models for compensation, work organization, etc.)
Attachment C: Interview Questionnaire

1. What do you see as the public transportation industry’s three to five biggest challenges in attracting and retaining employees?
   - Why are these the biggest challenges?
   - How have they arisen? What has changed in the transit industry or the outside environment to create these challenges?
   - What studies, data, or other evidence do you or others have that support your belief that these are critical challenges?
   - Will your answer be different in five years; in ten years?

2. In what ways do you see changing demographics in the workforce affecting the public transit industry’s and your organization’s ability to hire and retain employees? In particular:
   a. How well prepared is the industry for the increasing diversity of the workforce?

   b. How well prepared is the industry to address the changing expectations of younger workers (Gen X’ers and younger)?
      - What are those changing expectations?
      - How are they different from past expectations?
      - What changes have you made in response?
      - What changes could be made?

   c. Are there other key demographic challenges?

3. How are changes in technology affecting the industry’s ability to attract and retain employees?
   - What are particular challenges you have faced in adopting new technology?
   - What can done to address technology issues: with current staff? With potential new hires?
   - Are there concrete examples (positive or negative) you can cite from your experience or that of others that can help the industry address technology issues?
   - To what degree has the workforce been involved in the adoption and implementation of new technology? Would more involvement be helpful? How might it be achieved?

4. Can you suggest examples, from your organization or elsewhere, of innovative approaches to employee recruitment and retention. These can include examples of:
- Work reorganization
- New approaches to recruiting (responding, for example, to changed workforce demographics)
- New approaches to compensation
- Initiatives to address changes in technology
- Special school-to-work and/or other educational programs (e.g., apprenticeships, work with community colleges or vocational schools)
- Others

5. What barriers are there in the transit industry to innovation on workforce issues?
   - Political?
   - Institutional?
   - Work Rules and Practices?
   - Other?
   - How might these barriers be overcome?
   - Can you cite specific examples of addressing and overcoming barriers?

6. Many have said that one of the problems the transit industry faces in recruiting and retaining staff is its image.
   - Is this correct?
   - What is the sector’s image?
   - How might it be changed?

7. Are there organizations or businesses that are doing a better job than transit in competing for the transit industry workforce?
   - Why are they more successful?
   - Are there lessons that transit can learn from them?

8. What organizations or businesses can you suggest that might be good “benchmarks” for the transit industry to use in thinking about how to address workforce initiatives?
   - Can you cite public sector examples as models?
   - Private examples?
   - What can these other organizations or business teach the transit industry?

9. Are there institutions or other outside resources that the transit industry should be working more closely with in order to address workforce issues (for example, educational institutions).
   - Can you cite examples of successes in working with others?

10. What stakeholders need to be involved in APTA’s Workforce Development Initiative?
    Can you suggest ways APTA could reach out to these stakeholders?

11. What would you like to see as the outcome of APTA’s Workforce initiative?
- What products/results of the initiative would be most helpful to you and why?
  - Are there tangible products/resources/information that would be useful?
  - Would a benchmarking study of other industries be helpful? How could it be used?
- Where else do you look and what have you found helpful in addressing workforce issues?
- Can you suggest data, studies, or other resources that APTA might consider in its work?

12. Please suggest anything else that you believe would be helpful to APTA and the transit industry as it addresses workforce issues.
**Attachment D: Interviews**

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<th>Name</th>
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<td>1.</td>
<td>Victor H. Burke</td>
<td>Executive Vice President</td>
<td>Dallas Area Rapid Transit</td>
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<td>Peter M. Cipolla</td>
<td>General Manager</td>
<td>Santa Clara Transportation Authority</td>
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<td>Shirley A Delibero</td>
<td>President &amp; CEO</td>
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<td>Robert Molofsky</td>
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<td>Raymond Jurkowski</td>
<td>VP Human Resources</td>
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<td>Scott Ruddick</td>
<td>Manager of Education &amp; Training</td>
<td>Canadian Urban Transit Association</td>
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<td>Stephanie L. Pinson</td>
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<td>Beverly A. Scott</td>
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<td>Rhode Island Public Transit Authority</td>
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<td>Edward Thomas</td>
<td>Associate Demonstrator for R&amp;D</td>
<td>Federal Transit Administration</td>
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<td>Ronald J. Tober</td>
<td>CEO</td>
<td>Charlotte Area Transit System</td>
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<td>William L. Volk</td>
<td>Managing Director</td>
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<td>Tony Kouneski</td>
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<td>Paul A. Toliver</td>
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