



Signups in Pajamas: How SF Muni Started Bidding Online

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San Francisco Municipal Transit Agency

2019 APTA Sustainability & Multimodal Planning Workshop

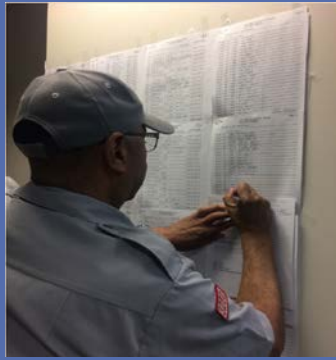
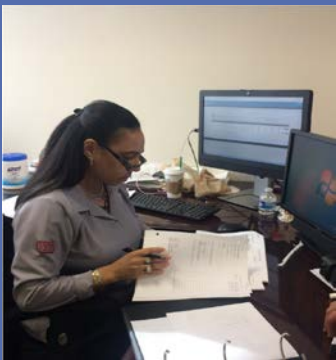


Project overview

Before



After



Today's presentation

- Motivation behind the project
- Muni's signups and implementation of online bidding
- **Where we got stuck**
- **And how we moved ahead**

to achieve

90%

operator satisfaction



"Everyone should do it"

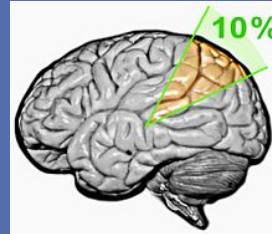
"Saves me a lot of time"

"I am so pleased...I will be your advertisement"

Project Motivation

Short term

1. Increase employee satisfaction and respect in the work place. Improve customer experience.
2. Fewer signup mistakes and rollbacks
3. Get more out of our Scheduling Software
4. Operator morale



Long term

1. Save time and money by conducting signups in a shorter time frame
2. Keep operators on the platform
3. Reduce GHG emissions and paper to support agency ecological goals



Signups are challenging for operators

1. It's time consuming

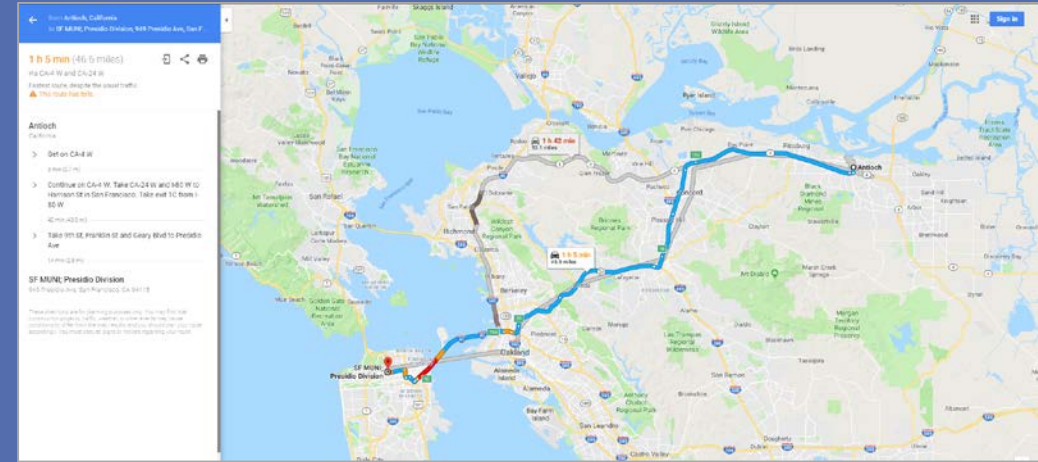
Most operators drive to work on their day off, some for over one hour each way

2. It's inefficient to search paper

Operators search for work by studying printed scheduling reports

3. It's hard to keep track

Operators must come to the division to get real time information on which runs are still available.



Benefits to Operators

- Bid from the comfort of their own **home**
- **Sort and Filter** available runs based on days off, start/end time and total hours
- Easily **keep track** of their top choice runs
- No need to come to the division on their **day off** to sign

Trapeze OPS-Web

SFMTA
Municipal Transportation Agency

OPS-WEB
Employee Self Service

Add New Bid Requests

BidUnit(s): RUNS AND BLOCKS

Division(s): ☒ All ☐ PRE

Days Off: ☐ All ☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☒ Friday ☒ Saturday

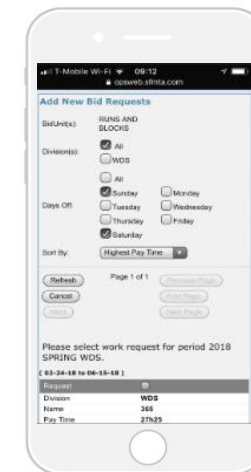
Sort By: Highest Pay Time

Page 1 of 1

Refresh Cancel Next Previous Page First Page Next Page

Please select work request for period 2018 SPRING PRE.
(02-24-18 to 04-15-18)

Division	Name	Pay Time	Pay Amount	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
<input type="checkbox"/> PRE	167	47h34	\$ 1664.83	167 PM Straigh 031 6:15p- 2:15x 480	167 PM Straigh 031 5:19p- 2:18x 539	167 PM Straigh 031 5:19p- 2:18x 539	167 PM Straigh 031 5:19p- 2:18x 539	167 PM Straigh 031 5:19p- 2:18x 539	OFF	OFF	Detail
<input type="checkbox"/> PRE	147	47h14	\$ 1653.46	147 PM Straigh 001 4:55p- 1:10x 495	147 PM Straigh 001 3:58p- 12:50x 532	147 PM Straigh 001 3:58p- 12:50x 532	147 PM Straigh 001 3:58p- 12:50x 532	147 PM Straigh 001 3:58p- 12:50x 532	OFF	OFF	Detail
				033 Split	033 Split	033 Split	033 Split	033 Split			



Preparing for Online Bidding since 2008

- 2008 – Started with OPS Bidding and OPS Web Bid Request
 - Specially trained operators only using intranet
 - Early discussions about online bidding
- 2013 – Made OPS Web available on the regular internet
 - Launched information portal for operators: operator.sfmta.com
- 2016 – Rollout attempt 1 = IT Ready, Transit Operations Not Ready
- 2017 – Started tracking Operator Skills and Skill Requirements for Bidding
- 2018 – Rolled out online bidding at rubber tire divisions for volunteers
- 2019 – Rollout at Rail and first cross divisional signup



Implementation overview

- Goals:
 - User-oriented implementation
 - Operators, sign up teams, schedulers
 - Show consistent and correct information with our print reports
 - Make available to 100% of operators
- Roll out decisions:
 - Optional program with volunteers – Business reasons
 - Bus divisions first, rail divisions later – Technical reasons
- Very positive response from our operators regarding...
 - Quality of training (in person and video)
 - Support from our Online Bidding Hotline
 - Convenience of the option
 - Ease of use
- No major problems so far



Don't get stuck!

The hardest part was not getting the tool to work,
it was helping our people understand it would **work for us.**

5 places we got stuck:

1. Building trust for the project
2. Enforcing our signup rules
3. Getting people to do it
4. Engaging the signup team
5. Supporting operators



Challenge 1 of 5: Building trust for the project

We were barraged with “what if” questions.

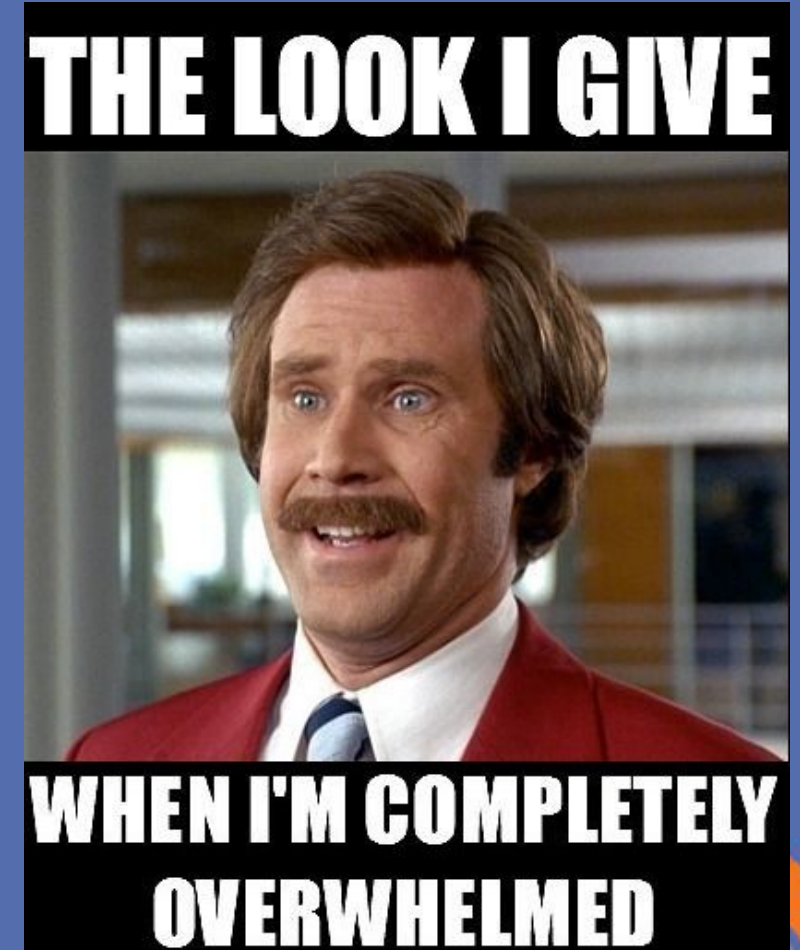
Solution 1 of 5

We needed to be able to answer them to earn trust and enthusiasm.



What do we mean by “what if” questions?

- What if the operator forgets to bid online?
- What if all of the operator’s choices are taken by the time their bid time comes up?
- What if the operator is not back on the platform yet?
- What if they change my mind? They registered to bid online, but now they want to bid in person.
- What if they don’t have internet access at home?
- What if they are on vacation during my bid time?
- What if someone with more seniority takes one of the choices they put on their digital choice slip?
- What if the operator needs more time?
- What if the website goes down?
- What if someone doesn’t have the internet?
- What if it doesn’t work on someone’s phone?
- What if the website cannot handle multiple users at once?
- What if the senior operators do not want to do it?
- What if it doesn’t work on Android?
- What if it has the wrong information?
- What if there is missing information?
- What if the employee doesn’t have the skills?
- What if it doesn’t work?
- What if the operator protests their work assignment?
- etc....



90% of questions can be handled with one response.

“How do we handle that now with the paper process?”

- What if the operator forgets to bid online and doesn't get their choices in?
- What if all of the operator's choices are taken by the time their bid time comes up?
- What if the operator is not back on the platform yet?

The other 10% of questions can be responded to with these:

1. “We've been thinking of that. We are thinking xyz could be a good solution. Do you think that would work?”
2. “We hadn't thought of that yet. What do you think is good way to handle it? May I get back to you?”
3. “Totally! It would be cool it could...<predict winning lottery numbers>! Unfortunately, the software from Trapeze doesn't do that yet. Do you think we should delay the roll out because of that feature?”



How we gathered feedback and started to build trust

- **Operators Demos:** Went out to divisions during signups with a laptop.
 - Live data from the signup during the demo
 - Logged in with “dummy” account
 - Gave the operator the mouse and walked them through logging in, making choices, and changing choice order.
 - Listened to their comments, and had them fill out an interest survey.
- **Union Leadership, operations management, IT Support:** Operator demo survey results, roll out plan, listening
- **Schedulers and signup teams:** Live Demos with what if scenarios



Scheduling Team & Signup Team Trial Runs

- Using TEST environment, practice online bidding as sign up team, schedulers, and operators
- Practice bidding simultaneously and “blitz” mode
- Scenarios: some smoothly running bid scenarios, some “surprise” mishaps
 - Operator puts choices in on time
 - Operator does not put choices in
 - Operator put choices in early, but they were not available at his/her bid time
 - Running a little late



Challenge 2 of 5: Enforcing our signup rules

User access, Skills, Look and Feel

There were some things we needed integrated with the technology.

Solution 2 of 5

We had to

- update Trapeze OPS Configurations
- use some new features
- change our business process a little



Update Trapeze OPS Configurations

Example:

Full time operators should only be able to bid on full time work, and part time operators should only be allowed to bid on part time work.

Issue identified:

FT Operators could bid on PT work

Solution:

Update mapping of Bid Units with Employee Types



Challenge 3 of 5: Getting people to do it

We weren't sure how to get people to actually do it, and we weren't sure how to approach training.

Solution 3 of 5

We realized we didn't need EVERYONE to do it. We just needed some people to do it, like it, and spread the word.

We also used a lot of channels to reach operators.

Training was required to participate, but participation was voluntary.



Recruitment: Flyers, Bulletins, Personal Invites



OPS-WEB
Employee Self Service

BIDDING ONLINE IS COMING!

Starting at   Bus Divisions for 2018 Fall Divisional Signup.
   Rail in 2019.



- **Optional, but operators must register in advance. Regular bidding with paper choice slips will remain.**
- **Bid from home or your mobile phone.**
- **Sort and filter runs by time, pay, and days off.**
- **Keep track of your top choice runs.**

Register online or on your division's paper registration form by July 11, 2018.

Online registration @ operator.sfmta.com

See your Union Chairperson for more information & to complete the paper registration form.



DIVISION BULLETIN

2018-WDS-000

Effective Date: [Tuesday, June 12, 2018]
Expiration Date: [Monday, December 31, 2018]

<signature here>
[Ayn Antonio]
[Woods Division Manager]

Online Bidding starting with the 2018 Fall signup

Starting with the 2018 Fall signup, you may choose to bid remotely from your own computer or smart phone. This online bidding method is optional. Operators who prefer to bid with a paper choice slip or in person will still be able to do so.

Benefits of online bidding:

- Bid from the comfort of your own home
- Sort and filter available runs based on pay, days off, start/end time and total hours
- Easily keep track of your top choice runs and review what runs remain available
- No need to come to the division to sign up
- Don't get locked out of OPS Web during signups – check your daily work assignment every day of the signup

Operators interested in this bidding method must complete the Online Bidding Registration Form and attend an in person demonstration during the Online Bidding Office Hours. Register online at operator.sfmta.com or at Woods Division on the paper registration form located in the Division Manager's office.

Please register by July 11, 2018.

Online Bidding Office Hours will be offered at your division starting mid July. Specific dates and hours will be sent out by a divisional bulletin. Hours will include opportunities for operators working different shifts and run types.

The online bidding method will be offered to operators during each divisional signup. To learn more consult your division managers or union chairperson.

Have questions? Check out these resources at operator.sfmta.com

- Frequently asked questions
- Step-by-step tutorial video
- Step-by-step written instructions



Mark Farrell, Mayor

Cheryl Brinkman, Chairman
Malcolm Heinicke, Vice Chairman
Guyaneth Barden, Director
Lee Hsu, Director

Cristina Rubke, Director
Art Torres, Director

Edward D. Reiskin, Director of Transportation

Dear Homer Simpson (Cap 1234),

Hope this message finds you well and thank you for providing outstanding transit service.

You are one of the top users of the OPS WEB online tool! As such, we'll like to inform of a new feature on OPS WEB to select your run/block/extraboard assignment during the signup bid process.

This is an option for you to signup electronically from the comfort of your home using a cellular phone or a computer/laptop during the bid.

We plan to be at «Division_Name» Division «Office_Hours_Date» from 0600 to 1800 and we'll like to walk you through this simple process. It only takes about 5 minutes.

If you'll like to take advantage of this new tool, please add your name to the registration form on operators.sfmta.com or add your name to the paper registration form at your division, located in the «Paper_Reg_Location».

Please feel free to contact your division manager or union chairperson, if you have any questions.



Demonstrations: Training Hours

- Training hours
 - 1-on-1 demos using computers at the divisions
 - Schedulers “talk,” operators “drive”
 - Key talking points
- 4 days at each division, “Rover” option, too
- Sign-off sheet to document that operators participated in demo, provided contact information, and wants to sign online
- Allow new operators to register and get signed off.



Challenge 4 of 5: Engaging the signup team

Keeping the signup team confident

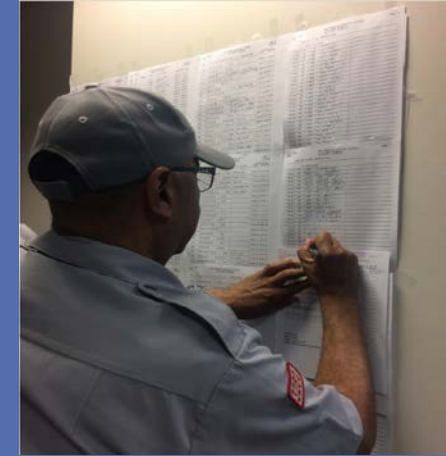
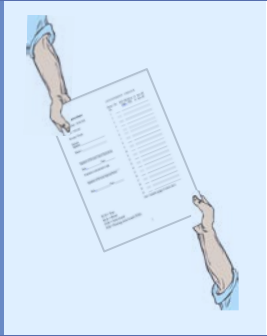
Solution 4 of 5

Run a trial run to go through different scenarios.
Made a special report.

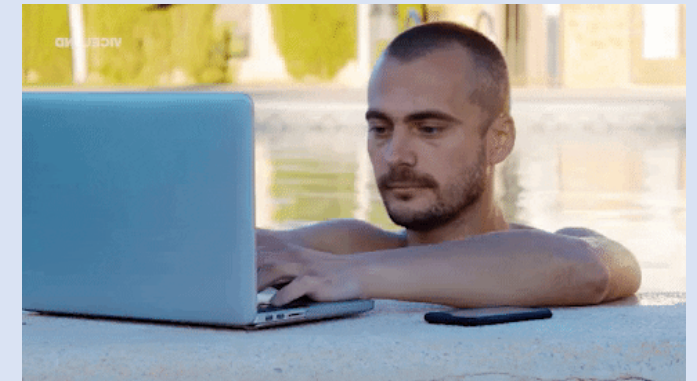
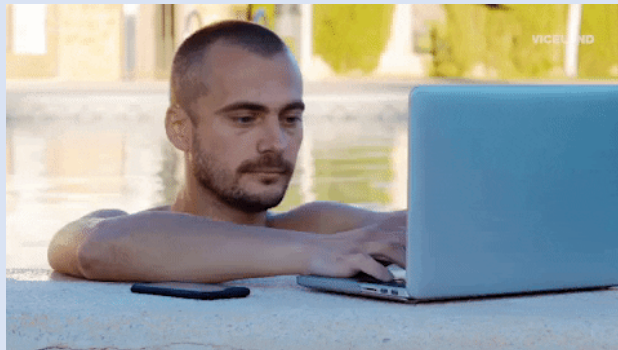


The Signup Team is the broker of Paper and Online Bidding

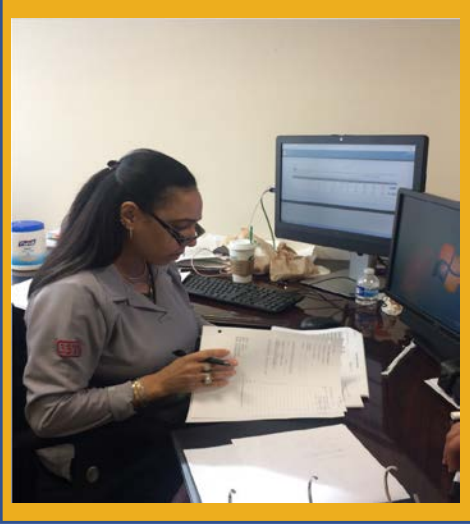
Paper



Online Bidding



Concerns of signup teams



- Did operator get choice in?
- What are their choices?
- Are all of his choices taken?
- Is he still working?

Division Name	Sequence	Employee Id	PIN	First Name	Last Name	ONLINEBIDDER	BIDDEADLINE	NUMBEROFCHOICES	LASTMODIFIEDTIME	CHOICEAVAILABILITY	CHOICESINORDER
WOODS	434					Yes	Deadline passed	7	More than 44 days ag	Bid Processed. Operator got 091(TF).	091(TF), 117(WT), 083(WT), 116(TF), 102(TW), 6030(TW), 064(MT)
WOODS	437					Yes	Deadline passed	8	More than 45 days ag	Bid Processed. Operator got 248(TW).	248(TW), 6085(WT), 6081(WT), 6087(WT), 6083(WT), 6091(WT), 6099(TW)
WOODS	439					Yes	Deadline passed	2	More than 44 days ag	Bid Processed. Operator got 117(WT).	117(WT), 6030(TW)
WOODS	440					Yes	Deadline passed	2	More than 44 days ag	Bid Processed. Operator got 179(MT).	179(MT), 6046(TW)
WOODS	441					Yes	Deadline passed	10	More than 44 days ag	Bid Processed. Operator got 6103(TF).	6103(TF), 273(TF), 6101(TF), 6109(TF), 6088(TF), 6091(WT), 6093(WT), 60
WOODS	442					Yes	Deadline passed	12	More than 44 days ag	Bid Processed. Operator got 254(MT).	254(MT), 107(WT), 273(TF), 064(MT), 116(TF), 113(WT), 187(TF), 176(TW),
WOODS	444					Yes	Deadline passed	3	More than 44 days ag	Bid Processed. Operator got 6088(TF).	6088(TF), 6091(WT), 6089(WT)
WOODS	445					Yes	Deadline passed	2	More than 45 days ag	Bid Processed. Operator got 6076(MT).	6076(MT), 6084(TF)
WOODS	446					Yes	Deadline passed	7	More than 44 days ag	Bid Processed. Operator got 6030(TW).	6030(TW), 6026(TW), 6032(TW), 6045(MT), 6044(TW), 083(WT), 6036(TW)
WOODS	447					Yes	Deadline passed	20	More than 44 days ag	Bid Processed. Operator got 271(MT).	271(MT), 290(TW), 6085(WT), 6095(WT), 6101(TF), 6093(WT), 6099(TW), 6
WOODS	449					Yes	Deadline passed	5	More than 44 days ag	Bid Processed. Operator got 6051(TF).	6051(TF), 116(TF), 6070(TF), 113(WT), 6064(WT)
WOODS	450					Yes	Deadline passed	11	More than 44 days ag	Bid Processed. Operator got 6087(WT).	6087(WT), 6093(WT), 6085(WT), 6095(WT), 6091(WT), 6081(WT), 6083(W
WOODS	451					Yes	Deadline passed	10	More than 44 days ag	Bid Processed. Operator got 6084(TF).	6084(TF), 6064(WT), 6061(WT), 6069(TW), 176(TW), 187(TF), 6071(WT), 6

Challenge 5 of 5: Support operators

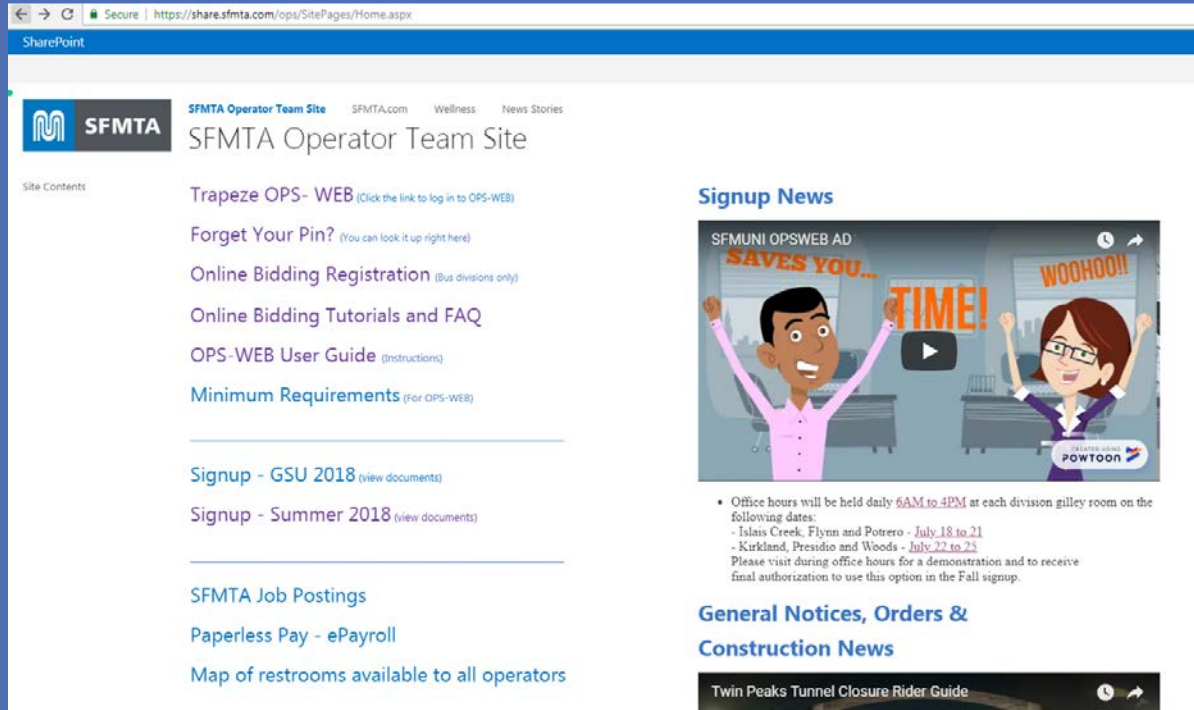
Supporting the operators, even in crisis.

Solution 5 of 5

Online Bidding Hotline.



Operator Resources: Online Video & Phone



Online Bidding hotline:
(510) 858-4550

The Online Bidding Hotline offers support through phone, text, and email.

20%

of operators used the Online Bidding Hotline



Next Steps

- Goal: 100% adoption
- First Cross Divisional GSU Bid
- Improvements to online information, user access, and business processes
- Collaborate with other agencies

Thank you!



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