

Best Practices in Workforce Development

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Presentation Outline

Agency Background

Human Capital Challenges Facing Agency

SamTrans Human Capital Investment Strategies

- Maintenance - Technical

- First-Line Supervision

- Leadership

Millennial Employee Strategies

Other Employer of Choice Strategies

Summary

SamTrans

- Service territory - San Mateo County, 446 square miles, and extending into San Francisco and Santa Clara counties
- District was formed in 1976 and administers:
 - SamTrans (San Mateo County Transit District)
 - Caltrain (Peninsula Corridor Joint Powers Board)
 - San Mateo County Transportation Authority (TA)



SamTrans Bus System

- Fixed-route service – 75 routes, 48,000 AWR
- ADA – 1,100+ AWR (contract service)
- Shuttles – 7,500+ AWR (contract service)
- 322 fixed-route buses
- 81 paratransit cutaways, vans, sedans
- \$130 million annual operating budget
- 700 employees (support 3 agencies)
- 300+ Transportation, 100+ Maintenance
- 3 operating facilities (2 agency 2 contractor)



Caltrain Commuter Rail

- Owned/Supported by three county agencies
 - San Francisco MTA
 - San Mateo County Transit District
 - Santa Clara Valley Transportation Authority
- 76 mile corridor – San Francisco to Gilroy
- 52 miles owned and dispatched by JPB
- 92 weekday trains
- 61,000 AWR
- \$125 million annual operating budget
- 440 TASI employees (contract service)
- Converting from diesel to an electrified propulsion system



Human Capital Challenges

- TCRP Project E-7: Up to 88% of today's transit workforce will have to be hired and trained in the next 10 years!
- SamTrans Strategic Plan: Over the next 7 years up to 50% of the existing workforce will retire or separate
 - Average separation age in Operations 60+ with 20+ years of service, primarily retirements
 - Average separation age in Administration early 40's, primarily moving to another agency or industry
- Complexity of work creates widening skill gaps at all levels of organization
- Mixing Millennial workforce with other generations requires changes in human capital strategy

SamTrans Human Capital Investments

- Maintenance – Technical
 - Labor/Management Partnership
- First-Line Supervision
 - In-house Supervisor Academy
- Leadership Training
 - In-house Leadership Academy
 - External Programs
- Millennial Employee Strategies
- Other Employer of Choice Strategies

Maintenance - Technical

- Maintenance training facility and dedicated staff
- Joint labor/management committee formed
 - Unified purpose and communicated support
- Facilitated by The Transport Learning Center
- Skill gap assessment completed all mechanics
 - Confidential process administered by TLC
- Targeted training plan developed
- Joint oversight of maintenance training programs
- Maintenance training certification program
- Open all classes to other agencies – Free!
 - SFMTA, MV, Tri Delta, SJRTD, MST

SamTrans Maintenance Training

Eleven Classes in Core Curriculum:

- Shop Safety and Procedures
- Basic Repair Skills
- Air and Brake Systems
- Hydraulic Brake Systems
- Basic Electricity
- Multiplex and Charging Systems
- Diesel Engine Tune-up and Troubleshooting
- Diesel Engine Electronic Control Systems
- Steering and Suspension Systems
- Automatic Transmissions
- Heating, Ventilation, and Air Conditioning Systems

Classes Taught by SamTrans Maintenance Instructor

What's Next – Technical Training

- Agreement with ATU for a State Certified Mechanic Apprenticeship Program
- Designing additional classes for vehicle subsystems, hybrid powertrains, cameras, ITS systems
- Doubling down on training capacity by adding a second dedicated Maintenance Instructor



SamTrans – Supervisor Academy

- **Problem/Need**

Prepare non-supervisory team members to compete for open positions and successfully transition to first-line supervision

Improve the supervisory and leadership skills of existing Lead Mechanics, Transportation, and Maintenance Supervisors

Enhance knowledge/awareness of self, team, agency, industry

- **Solution**

Target training to agency specific needs

Customized curriculum – leveraging available resources

Delivered by agency management team

Repeat academy sequence multiple times per year – availability

Measure results, adjust program as needed

SamTrans – Supervisor Academy

Modules:

1. Career Advancement in Public Transportation
2. Transit 101/Workplace Ethics/Core Values
3. Emotional Intelligence
4. Maintaining a Positive Attitude
5. How to Receive/Delegate Work Assignments
6. Solving Problems Together
7. Working with Others
8. Communicating with Others
9. Meeting Change Creatively
10. Elements of Supervision
11. Employment Applications
12. Resume Writing
13. Interviewing Skills



Academy open to other agencies

SamTrans – Leadership Academy

- **Problem/Need**

- Prepare first-line supervisors, mid-level managers, and other key team members for higher levels of responsibility

- Improve the leadership skills of existing management team

- Improve cross-departmental collaboration within “three” agencies

- Enhance knowledge/awareness of self, team, agency, industry

- **Solution**

- New Leadership Academy – “Supervisor Academy on Steroids”

- Customized curriculum – leveraging available resources

- Delivered by agency management team and consultant including employee 360 survey and feedback – Dave Jensen XLM

- Participants selected to leverage diversity throughout agency

- Designed to motivate a commitment to continuous learning, the academy is a step in a life-long process of growth

Leverage External Programs

- APTA Early Career Program
 - Industry and Local Agency Mentors
- APTA Mid-Manager Seminar
- APTA Leadership Program
- Eno Center for Transit Leadership
 - Executive Leadership Program
- Transit/Paratransit Management Certificate Program
 - UOP– delivered in No/So California locations
- Local Public Sector Training
- Targeted Skills Seminars
 - Public Presentations, Meeting Facilitation,
Business Writing, Contract Administration,
Project Management

Millennial Development/Retention

- Loyalty is to a cause or their passion, not a job or agency
- Skeptical of the “promises” that Boomers and others worked for – ex: Pension/Security
- Want to be exposed to new learning opportunities
- Need to “experiment” in personal/professional lives
- Are likely to be less place centric than older generations
- Want to make a significant contribution with their work
- Ambitious yet seeking work/life balance
- Millennials leave not because they have a reason to leave, but because they don't have a reason to stay

Millennial Development/Retention

- Hired summer interns to work on our bus service system redesign
 - Assigned them significant work that contributed to success
- Didn't meet agency minimum quals for Planner level positions
- Created job/career ladder – Associate Planner/Scheduler, Planner/Scheduler, Senior Planner/Scheduler, Principle Planner, Manager, Planning
- Crossed trained and exposed to various agency functions via special project assignments, job shadowing, participation in division level staff meetings, public stakeholder meetings/events

Millennial Development/Retention

- Engage Millennial employees – Ops Planning first line supervisors mentor/coach and ask employee to commit to execution of a Professional Development Plan (PDP)
- Professional Development Plan content
 - Career Goals 1, 3, 5, 8,15, 20 years
 - Strengths and Opportunities for Growth
 - Development Plan split into Core Skills, Key Interests, Professional Needs
 - Training timeline
 - Key projects that contribute to the PDP
 - Follow up
- PDP aligned with career goals – agency/industry review of job postings, minimum quals, skills required

Millennial Development/Retention

- Empower, Challenge, Trust, Integrate
- Example – SamTrans Bus Route Design Contest
 - Selected a core bus route that has service/market challenges/competing objectives
 - Empowered each Millennial to analyze route/system data, develop various route re-design options, potential benefits and tradeoffs
 - Participants presented to Ops Planning Manager and other Senior Operations employees
 - Ideas considered for inclusion in future run books
- Today's Transit Agency Leadership must recognize the cultural shifts in play and adjust their human capital strategies and expectations
 - The mobility of Millennials will require higher levels of training and resources to retain/fill key positions

Other Employer of Choice Strategies

- Agency Tuition Reimbursement Program
- Alternate Lead and Acting Assignments
 - Consider financial incentives for additional duties/acting assignments
- Job Shadowing Assignments
- Intern Program – Summer Interns and Management Interns – Why not High School Interns?
- Form cross-functional teams to implement complex agency-wide initiatives
- Employee Health/Wellness – Exercise facilities and/or subsidized training, Free Health Fairs, Community engagement in health related causes
- Formal and Informal Recognition Programs

Summary

- Don't turn your back on the ocean – a tidal wave is approaching!
- Develop your attrition forecasts and succession planning, don't ignore any level of agency
- Your HR team can't do all the work, train other staff on how to assist the workforce in developing career goals and Professional Development Plans
- Leverage external training programs/consider pooled training with peer agencies
- Use subject matter experts from your agency to build a faculty and training program – SamTrans University
- Training programs must address technical skill gaps and management/leadership skills

Summary

- The senior leadership of today must engage the incoming millennial workforce and truly understand the cultural shift compared to their personal value system
- We must recognize that the future workforce will be more mobile and demanding and adjust our human capital strategies
- Organizational structures must provide for entry level millennial employees and career paths/ladders
- The millennial workforce is skeptical of the future based on their life experiences/observations – building trust and attachment to the agency's mission combined with investments in training/development increase potential retention

Thanks!

For a copy of this presentation or to
discuss workforce development

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