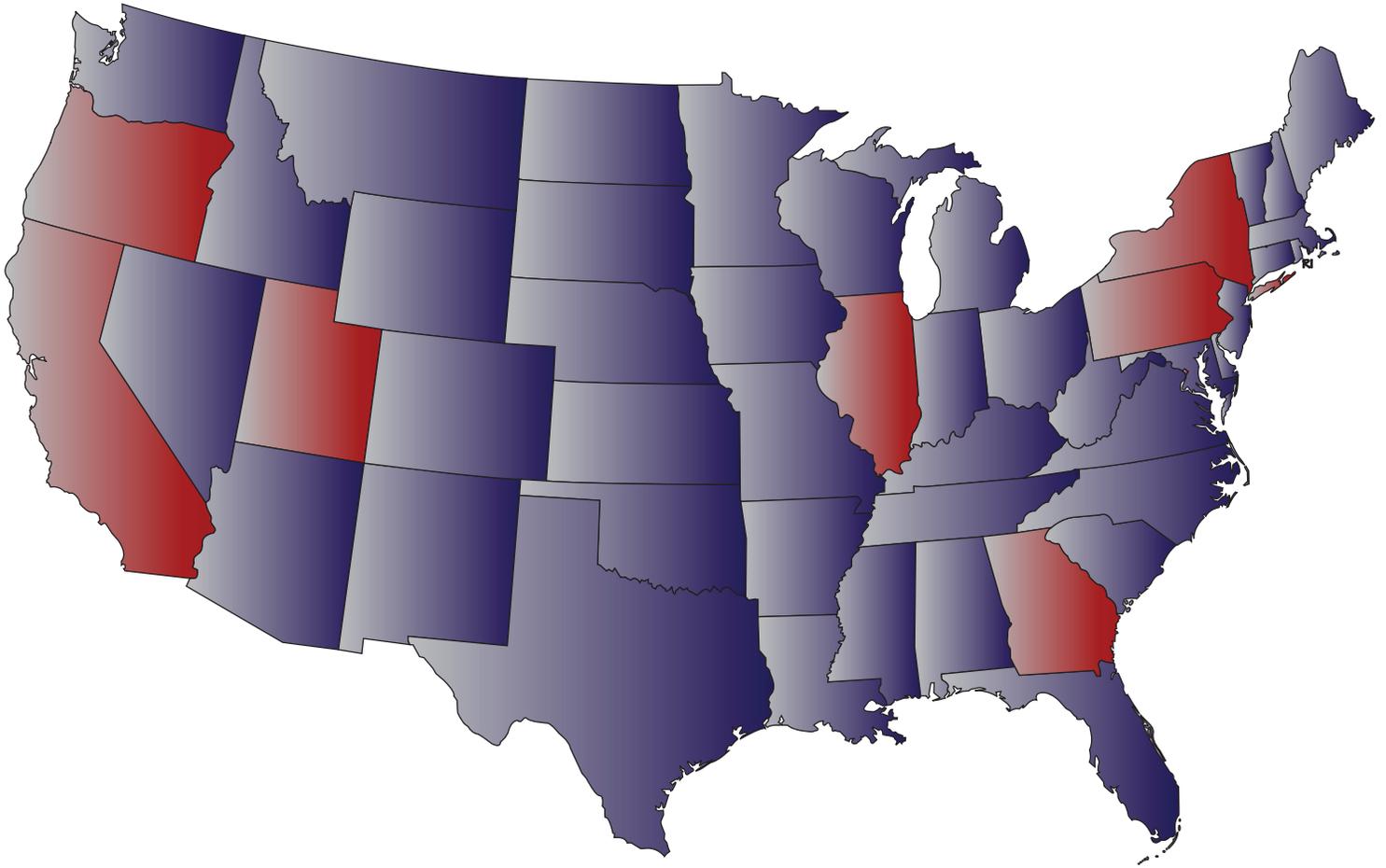


# TRAINING PARTNERSHIPS THAT WORK: AN EMERGING NATIONAL NETWORK



TRANSPORTATION LEARNING CENTER

# INTRODUCTION



As concern over greenhouse gas emissions and gasoline prices rise to the forefront of the American conscience, demand for green, efficient and easy-to-use transportation alternatives to the private automobile is on the rise. Accordingly, today's public transportation systems are faced with an unprecedented opportunity to build new and expand or overhaul existing systems in response to growing public demand. Transit agencies and unions are developing models for making transit a high level performance sector. Training partnerships have proven to be a particularly effective in fostering employee skills and in laying the groundwork to move transit workplace relations into the 21st century.

The vignettes in Partnerships in Profile model successful transit labor-management training partnerships from across the nation. Labor-management partnerships to upgrade workforce training are on the rise at transit systems large and small. At the local level, labor and management are working together to build training programs that best meet the needs of both agencies and workers. In the process, they create templates that can be applied to transit's national skills crisis.

Through partnerships, labor and management can jointly map out a training plan that meets an agency's unique needs, while at the same time benefitting workers through new opportunities. Joint participation in partnerships gives both sides ownership of the training development and implementation process. Workers gain from regular training with a career ladder progression and systems benefit from decreased maintenance costs, improved vehicle performance and a steady supply of qualified workers. The greater community an agency serves also gains when a transit system implements a joint training partnership. As the transit industry grows, the size of its workforce inevitably expands. Recruiting and training a dynamic and talented new workforce must be a priority, for which joint training partnerships that establish career ladders are powerful recruiting tools.

The partnerships profiled here range from long-established training systems such as that between Chicago Transit Authority and International Brotherhood of Electrical Workers Local 9 to Pennsylvania's broad, statewide Keystone Transit Career Ladder Partnership, which encompasses over 25 transit agencies and local unions. In contrast, relatively young joint efforts, such as that between Metropolitan Atlanta Regional Transportation Authority and Amalgamated Transit Union Local 732 are also included. The cases included here represent a diverse set of transit systems and unique training partnerships. Most importantly, they illustrate how labor and management can work together successfully on issues of training, and provide valuable lessons for other industries facing the problem of retiring baby boomers and inadequate capacity to train replacement workers. When labor and management work together, both labor and management win.

**RAY MARSHALL**  
University of Texas at Austin  
Former US Secretary of Labor

# PARTNERSHIPS IN PROFILE

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# Metropolitan Atlanta Rapid Transit Authority & Amalgamated Transit Union Local 732

Location	Atlanta, Georgia
Employees	4,992
Trips in 2008	159 million

**Dr. Scott is a big champion for employee development and career ladders - basically making sure that our workforce has the training they need to perform at the best possible levels.**

David Wright  
Director of Training  
MARTA

Training partnerships can both evolve from and be an opportunity for fresh ideas, as is the case in Atlanta, where the Metropolitan Atlanta Rapid Transit Authority (MARTA) and Amalgamated Transit Union (ATU) Local 732 have developed a productive new relationship under the leadership of MARTA CEO Dr. Beverly Scott and ATU Local 732 President Benita West.

Prior to the partnership, MARTA's training program was struggling. Training did not address the agency's training needs in a systematic and productive manner, and its apprenticeship system had stopped enrolling trainees in 2003. Trust between labor and management was minimal. Change started when Dr. Beverly Scott took over as

CEO of MARTA and Benita West was elected President of Local 732 – both in late 2007. Labor and management agreed on the necessity of bolstering MARTA's training programs and formed the partnership as a way to address training needs.

A more positive, constructive labor-management relationship emerged after the partnership began. David Wright, the Director for Training at MARTA, explains that open channels of communication have been a major benefit of the partnership, with labor and management working together more productively. The partnership's first task was a skill gap analysis of 334 workers to measure the strength of the workforce's technical abilities and identify specific areas where training was needed. Labor and management leadership worked hard to ensure employee participation in the planning and survey process. Using the skills gap analysis as a starting point, labor and management reviewed the results and developed a plan to address training needs. The first significant training took place in 2009 when over 120 mechanics and electrical technicians participated in a 3-day class in troubleshooting friction brakes and the results were excellent. Workers who took the class developed a more thorough understanding of the brake systems and requested more training in other areas.

Curtis Howard, Vice President, ATU Local 732, explains that everybody understands "we have a similar goal, which is to prepare the workforce to perform at the highest level possible and prior to the training partnership labor and management were adversarial about how we get to that common goal."



**Dr. Beverly A. Scott**  
General Manager/CEO MARTA

When preparing for the future of the transit industry, it is critical that workforce development be included in the efforts. As with any business, the talent and abilities of its workforce will steadily define the strength of the transit industry.

Over the past eight years, national leaders of transit management and labor have been building new partnerships to strengthen workforce training. At the national level, the newest product of this joint effort is a system of national training standards. These are tools we can use to jointly building the skills our industry so urgently needs.

I applaud the leaders from the various transit agencies that have come together to take on the challenge of increasing and improving training. Their efforts will greatly benefit the transit industry today and in the future.

# Chicago Transit Authority & International Brotherhood of Electrical Workers Local 9

The high quality of the partnership between the Chicago Transit Authority (CTA) and the International Brotherhood of Electrical Workers (IBEW) Local 9 is demonstrated not only by its longevity but by the willingness of its sponsors to return to the model several years after its inception as a way to tackle new problems. Tracing its origins to 1992, the partnership began when labor and management saw a need to bolster training for traction power workers. Training programs had fallen victim to financial constraints at the transit agency, and the resulting lag in training meant that workers were more prone to on-the-job injuries, fewer workers were being promoted and equipment was breaking down more frequently. Leadership in Chicago identified a joint training program as a solution to CTA's training difficulties. The first traction power training courses convened in June 1993 with classes offered at a local IBEW training facility.

<b>Location</b>	<b>Chicago, Illinois</b>
<b>Employees</b>	<b>11,902</b>
<b>Trips in 2008</b>	<b>526 million</b>

Establishing trust between management and workers was essential to launching the program. Workers were initially hesitant to support a joint training partnership because they did not want to hear that they did not know how to do their jobs. Leaders at Local 9 assured their members that participating in training would be a positive experience, providing job security and a clear promotional path. John Burkard, business representative of Local 9 and a participant in the training from its initial inception, explains the benefits of joint training for labor, "Partnering for education is critical to protecting our jurisdiction. It is in our interest as well as the company's, not to mention the employee's interest, to have the best educated, most productive and safe worker."

A few years later, in light of the successes of the traction power partnership, CTA again used a labor-management model to develop new training, this time for signals technicians. Until that point, CTA had contracted signals training out to an engineering firm, an arrangement that provided unsatisfactory results - employees felt that they weren't learning applicable skills in the classes.

The common features that workers find the most valuable of the partnership's work-based training systems give them the opportunity to:

- Learn from instructors who work on the same equipment and therefore can teach students exactly what they need to know to perform their jobs to the highest standard
- Gain knowledge from teachers who can answer any question
- Access the equipment that they will eventually be working on both in the classroom and during field trips to the facility
- Establish a feeling of ownership and pride in their work.

All classes for both signals and traction power are offered on at least an annual basis. Moreover, the partnership rewards the most thoroughly trained employees by giving them top priority when overtime is available.

Labor and management are equal partners in every step of this training endeavor. The governing committee of the partnership and the specialized committees for various occupations are all comprised of equal numbers of labor and management participants. At every level labor and management have an equal voice in the partnership.



# Project Empire Transit Career Ladder Partnership

Kicking off in 2006, the highly productive Project Empire Transit Career Ladder Partnership is an innovative labor-management endeavor focused on improving training for bus mechanics at the Capital District Transportation Authority (CDTA) in Upstate New York in partnership with Amalgamated Transit Union (ATU) Local 1321. In evidence of its effectiveness, the partnership has rapidly expanded to a regional initiative, incorporating Central New York Regional Transportation Authority (CENTRO) and ATU Local 580 Broome County Transit and ATU Local 1145, and Tompkins Consolidated Area Transit and UAW Local 2300.

Though relatively young, Project Empire is already yielding tremendous positive results for CDTA and Local 1321. According to CDTA's Vehicle Maintenance Audit report conducted by an independent auditor in September 2008, bus defects for the year following the training (2008) represents a 30 percent decrease when compared to previous years. In areas where there is focused training, such as suspension and steering, defects per bus have dropped by as much as 59 percent. MDBF (mean distance between failures) is an industry measure of the number of miles a vehicle travels before breaking down. A higher MDBF indicates better vehicle reliability and longer stretches of uninterrupted service for transit customers. As a general rule, MDBF tends to deteriorate over time as equipment ages. Without any addition of new fleet, CDTA improved its monthly average MDBF by 638 miles, or 18 percent, following the joint training program. CDTA is also saving money by bringing previously outsourced maintenance work back to the agency to be performed by its own employees.

Moreover, the training partnership has given the two entities common ground to work together in a constructive manner. Labor and management are both benefiting from improved relationships that began after the partnership launched. Participants from both sides point to an "us versus them" mentality that prevailed between labor and management prior to the partnership. David Stackrow, Chairman of the CDTA Board, explains how the labor-management relationship improved after training, saying, "the teamwork aspect of pulling together in one unified effort to train employees, specifically mechanics, has given us something in common that we have been able to work together on." Rick Shaver, a Mechanic and Recording Secretary for ATU Local 1321 echoed this sentiment, saying "one of the accomplishments [of the partnership] is working together with management. That is one of the biggest things. We are on the same side here."

Location	Albany, New York
Employees	650
Trips in 2008	15.3 million

## CDTA Number of Classes Offered & Number of Students Trained October 2007-September 2008

Type of Class	# of Students
Advanced Electrical/MPX	5
Air/Air Brakes	14
Allison Hybrid Familiarization	49
Chevy 6.6 & Ford 6.0 Engine	11
Cummins Diagnostics	13
Cummins Familiarization	22
Electrical I	19
Engine Principals & Diagnostic	14
Heating, Ventilation & AC	7
Helper Promotional Training	3
Hydraulics	8
Preventative Maintenance	8
Second Class Promotional Training	20
Trans. Principles & Diagnostic	9
<b>TOTAL</b>	<b>202</b>

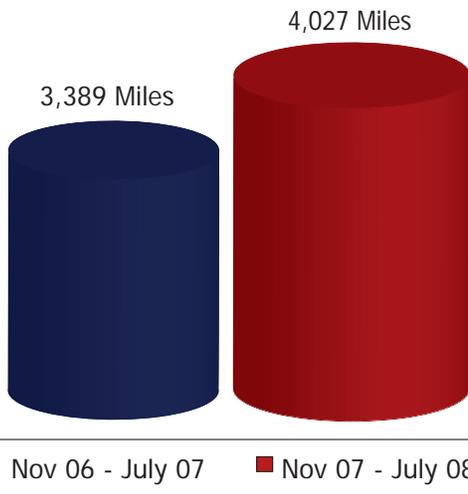


Between October 2007 and September 2008, CDTA maintenance employees took advantage of more than 200 training opportunities through Project Empire. Each of the 152 employees in maintenance, from helpers to first class mechanics, was given the opportunity to participate in at least one class. Training classes developed in-house cover basic through advanced technical knowledge in a variety of subject areas such as engines, transmission, brakes and electrical.

CENTRO and ATU Local 580, recognizing that 50% of their mechanics would be retiring within a decade, developed a comprehensive joint training agenda that included a new training room and aids to assist incumbents and new hires alike. In 2009 alone, dozens of training opportunities have been provided in everything from basic computer usage, brakes, electric drive systems, fuel systems and towing and recovery. The partnership developed a comprehensive introductory training program with Onondaga Community College for refresher training for incumbents and new hires.

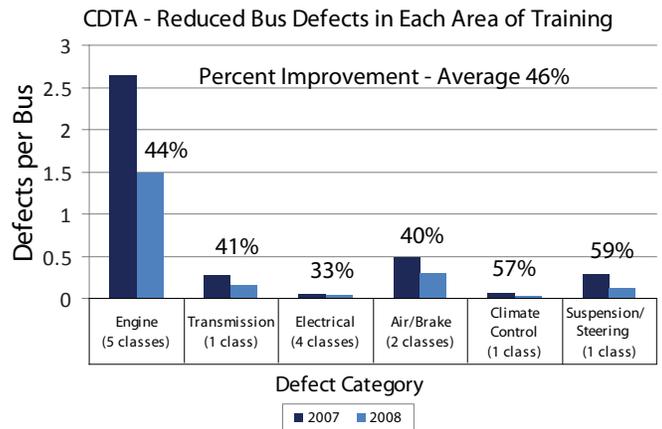
Both partnerships are guided by a policy steering committee of top union and management leadership. They use a data-driven process to guide the partnership. This process includes conducting job task analysis, workforce skills surveys and analysis of skill gaps through joint shop-floor working groups.

### CDTA MDBF Significantly Improves



The MDBF (Mean Distance Between Failures) measures the number of miles a vehicle travels before breaking down. A higher MDBF indicates better vehicle reliability and longer stretches of uninterrupted service for transit customers. As a general rule, MDBF tends to deteriorate over time as equipment ages. Without any addition of new fleet, CDTA improved its monthly average MDBF by 638 miles, or 18 percent, following the joint training program.

After initiating joint training, there was also a decrease in the number of defects found in CDTA buses. According to the Vehicle Maintenance Audit report conducted by an independent auditor in September 2008, the 5.9 defects per bus for the year following the training (2008) represents a 30 percent decrease when compared to the average 8.4 defects in previous years. In areas where there is focused training, such as suspension and steering, defects per bus have dropped by as much as 59 percent.



**I don't think any transit property will be successful if it does not continually invest in its workforce. In fact, I think, the one thing that will separate success in this industry from failure will be the transit property's ability to understand that training is an investment, not an expense.**

Ray Melleady  
Executive Director  
CDTA

# Santa Clara Valley Transportation Authority & Amalgamated Transit Union Local 265

Empowerment, cooperation and learning are just a few of the components contributing to the vibrant success of the brand-new labor-management training partnership between Santa Clara Valley Transportation Authority (VTA) and Amalgamated Transit Union (ATU) Local 265 in Santa Clara County, California. Launched in January 2008, VTA and ATU 265's Maintenance Career Ladder Training Program (MCLTP) may be young, but it has already solved real problems at VTA, using a comprehensive philosophy to produce significant improvements in worker training.

Location	Northern California
Employees	2,100
Trips in 2008	46.6 million

Establishing career ladder partnership training for workers was a clear necessity for VTA and ATU 265. Prior to the establishment of the MCLTP, VTA encountered debilitating difficulties recruiting workers to replace the journey-level mechanics nearing retirement age, at a time when 50 percent of the agency's skilled mechanics were over the age of 50. At the same time, VTA service workers, who clean and fuel the vehicles, suffered from a shortage of options for career advancement. A career ladder training system, administered jointly by the agency and union - which used the union's problem of workers in need of advancement options to solve the agency's problem of a shortage of skilled mechanics - was a welcome revelation at Santa Clara. As the agency and union worked out a system of career ladder training, VTA began growing its own skilled mechanics in-house. VTA and ATU 265 maximized the effects of their new initiative by concurrently establishing an additional career ladder training for bus operators, improving operators' effectiveness through the inclusion of on the job training and access to experienced mentors.

Though labor and management worked together at every stage of getting this training partnership off the ground, establishing the working relationship necessary to facilitating the new program was not without its own set of challenges. The first challenge was transforming the labor-management relationship on training from one of confrontation to one of cooperation. Labor and management also had trouble focusing on jointly identified common ground. To overcome these challenges, all parties strove to keep the end goal in sight, identifying and focusing on issues for which labor and management priorities overlapped. The importance of the new training initiative helped keep everyone on track: today, labor and management have a positive working relationship on training issues.



**The biggest success was seeing and hearing that the workers feel empowered. They feel much happier. They feel like they're much more knowledgeable. They have a career.**

Russell Anderson  
Maintenance Training Supervisor

Later in the year, the first round of training began, facilitating career ladder advancement for ten service workers. All ten trainees completed the program successfully and each received promotions. Training included learning advanced technical skills but also invaluable "soft skills training" that helped workers transition into new positions. Incorporating training on soft skills is important because it helps new employees with the transition by creating a support system and informing them of the chain of command for seeking help, increasing their likelihood of success and reducing adjustment time in their new positions. Trainees also reported the benefits from having mentors who helped them with on the job training and the adjustment to their new positions.

Russell Anderson, VTA maintenance training supervisor, praises the training's success because it produced "ten of the most highly skilled workers in the service industry, who will go on to become some of the finest journeyman technicians at VTA." Establishing a career ladder system, explains Ed Dolores, the business representative for ATU 265, "lifted people's morale knowing that there was a career ladder, that they weren't stuck on a fuel island the rest of their lives."

# Alameda-Contra Costa Transit District & International Brotherhood of Electrical Workers Local 1245

Partnership is nothing new at the Alameda-Contra Costa Transit District (AC Transit), where labor and management have been working together on training issues for twenty years. In 2007, when AC Transit proposed merging two positions, farebox technician and communications technician, into a single electronic technician classification, labor and management saw a new joint training partnership as the natural solution to providing necessary worker training in the new classification and creating an effective labor-management process to guide and oversee the training.

<b>Location</b>	<b>Northern California</b>
<b>Employees</b>	<b>2,196</b>
<b>Trips in 2008</b>	<b>41.9 million</b>

AC Transit first recognized the value of a training partnership in 1989 when a Joint Apprenticeship Committee (JAC) was launched with Amalgamated Transit Union (ATU) Local 192. This longstanding joint labor-management endeavor laid the groundwork for the new partnership between AC Transit and the International Brotherhood of Electrical Workers (IBEW) Local 1245.

Early in the development process, employees voiced concerns about changes in pay rates and seniority resulting from the creation of the new classification. Labor and management worked together to resolve these concerns, resulting in the workers receiving higher pay and keeping their seniority levels in the new position. Sheila Lawton from IBEW states that the partnership development process was successful because the union went into it "knowing that we would have an equal say in how the process would work. The creation of a JAC seemed to be the thing that most people could buy into", testifying to the strength of the labor-management relationship at Alameda-Contra Costa.

**Because of that experience we've been able to foresee some of the pitfalls and avoid them. That's through open and honest dialogue. That's just the best way to do things.**  
Henry Bustillo  
Maintenance Training Administrator  
AC Transit

Another testament to the strength of this training partnership is that it integrates an apprenticeship component, which is registered with the US Department of Labor and the state of California. Apprenticeship systems afford workers the opportunity to get paid while they learn and the ability to build a career. AC Transit benefits from a dynamic, skilled and efficient workforce.

The new partnership is governed by its own Joint Apprenticeship Committee (JAC), comprised of two labor and two management representatives, who consult and operate as a separate entity from the JAC governing the longstanding ATU Local 192 partnership. The JAC meets regularly to assess training needs and priorities, and is assisted in the training development process by an apprenticeship consultant and apprenticeship coordinator. The partnership has come a long way in a short amount of time to overcome reservations the workers had about the partnership and establish a high quality training system.



- ### Top Training Priorities
- ✓ Automatic Passenger Counters
  - ✓ Traffic Priority Systems-Headsign
  - ✓ Orbital Overview and AMDT
  - ✓ WiFi, LAN and WAN-GPS
  - ✓ Radio and Interface Box-AVA-PA
  - ✓ Software Diagnostics & System
  - ✓ Camera Systems
  - ✓ Farebox

# Keystone Transit Career Ladder Partnership

Persistence, trust and courage to change the status-quo are at the core of the Keystone Transit Career Ladder Partnership, the state of Pennsylvania's Labor Management transit training program. The Amalgamated Transit Union (ATU), Transport Workers Union (TWU), and 30 transit agencies from across the state participate in the partnership. Thousands of public transit mechanics have attended the subsidized training that is defined by partnership's labor-management Work Groups. The partnership has prevailed through changes in agency administration, union leadership and numerous contract negotiations.



In 2001, top-level leadership from Southeastern Pennsylvania Transportation Authority (SEPTA) and the TWU Local 234 broke ground to form a new partnership in Philadelphia. At the time, SEPTA faced critical shortages of first class and specialist mechanics caused by an increase in retirements in conjunction with a shortage of skilled applicants. These workforce challenges brought to the forefront the importance of investing in the training capacity necessary to adequately educate employees in-house.

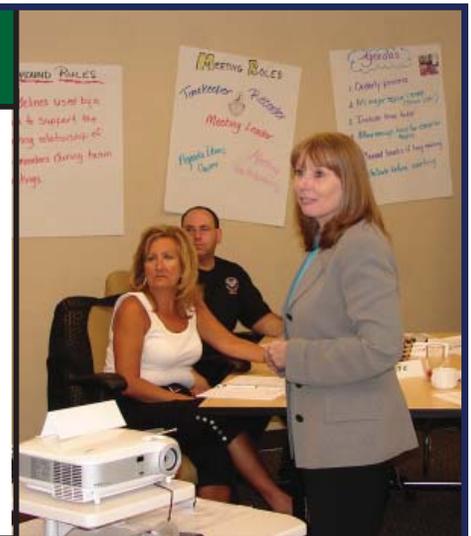
The formation of a new statewide program was a logical next step to compliment and support the training program in Philadelphia. Together, Pennsylvania's public transit agencies would be able to address the industry's influx of new technology, as well as the training needs of incumbent workers and creation (or in some cases, enhancement) of career ladder programs. Moreover, a statewide partnership enabled access to funding resources in the state capitol. After a round of consultations with TWU, ATU and SEPTA, the Pennsylvania AFL-CIO and Transportation Learning Center secured funding through the Pennsylvania Department of Labor and Industry to form the labor-management training partnership at transit agencies across the state. To date, funding levels have reached as high as \$1.3 million per year, leveraging core funding to access additional thousands from local sources.

The unions and employers began the training design process with an agreement that the training partnership needed to operate independently from other labor-management conflicts. This commitment insulated the program from work stoppages during two contract negotiations, allowing training to continue even during these fractious times, whereas historically, strained relations between SEPTA and TWU Local 234 contributed to problems with training capacity and shortages of skilled workers. Previous positions and old fights had to be set aside to make room for the data-driven joint decision-making required for the new partnership to succeed.

As Keystone-funded training at SEPTA continued to expand, with the help of the statewide ATU Conference board and the Pennsylvania Public Transit Association, it also started to take off at smaller properties across the state, with the benefits of the program spreading by word of mouth between properties. Prior to Keystone, little if any maintenance training was available to these smaller properties outside of Philadelphia. By June 2003, Keystone had offered training to 125 workers from more than 20 Pennsylvania transit systems, in courses ranging from basic and advanced electrical systems to bus and van brakes, to preventative maintenance and air conditioning.

## Features of the Partnership

- ✓ Assess training priorities based on skills gap analysis
- ✓ Develop curriculum through joint labor-management workgroups
- ✓ Training aides
- ✓ Train the trainer programs
- ✓ Remedial Evaluation and basic education to prepare workers for career ladder training
- ✓ Serves as the pilot organization for Keystone Development Partnership, a multi-sector labor-management training partnership



Charlie Shilk, Director of Maintenance at the Johnsonburg Area Transportation Authority, hailed Keystone training as a “God-sent program to the smaller Class 4 and Class 5 properties across the Commonwealth. The mechanics who have attended classes come back to the Authority with their ‘batteries charged’ and ready to go. [They] bring back a wealth of knowledge garnered from the training session they attended”.

Prior to the partnership, SEPTA classes often suffered from empty seats, and trainees’ failure rate was near 50 percent. Through the joint process, TWU and SEPTA recruited more trainees for promotions and supported the classroom instruction with a more formalized mentor program that increased the success rate to over 90 percent. After a single year, Keystone had trained 125 percent of its target, and SEPTA instructors were travelling across the state to share Philadelphia’s training capacity with smaller properties, which largely lacked internal training capacity. Today, empty seats in classes are a rarity.



Another major early breakthrough at SEPTA occurred in the area of elevator and escalator maintenance, where new training covering safety, programmable logical controls, and other new technologies were put into place. SEPTA and TWU credit the partnership for solving the problem of developing the curriculum and identifying third party instructors for the elevator escalator program.

Recently, the SEPTA-TWU partnership in Philadelphia supported a collective bargaining agreement to form a Joint Apprenticeship Council, which oversees Joint Apprenticeship Committees for bus, rail vehicle, facilities, and elevator escalator training programs.

The overwhelming success of the program eventually made headway in Pittsburgh as well, where the Port Authority had particularly contentious relations with ATU Local 85. Collective bargaining conflicts heated up in late 2008, but the policy steering committee and joint labor-management working groups functioning under Keystone still met regularly during other labor-management strife, keeping training opportunities active despite the conflict. Trust is central to the success of the local Pittsburgh partnership, as emphasized by Local 85’s Keystone Training Coordinator, Dave Gerber: “Bill Amick (Port Authority Training Coordinator) and I have built a relationship of trust. Neither of us is on guard all the time about what we say. We’ve been able to extend our relationship of trust out to the working groups.”

As time went on, it became clear that Keystone would develop into a long-term, self-sustaining statewide initiative. In the interest of establishing an internally-sustainable operations system, the Pennsylvania AFL-CIO established the Keystone Development Partnership (KDP), a 501(C) 3 non-profit corporation which today not only oversees the Keystone Transit Career Ladder Partnership, but has provided program management for the Logistics and Transportation Industry Partnership and manages an Advanced Manufacturing Industry Partnership. In 2006, the Pennsylvania Department of Labor and Industry funded KDP to replicate the Transit Career Ladder Partnership for the utilities industry that includes the electric, gas, and water sectors. As program manager for the two key industries, public transit and utilities, KDP is able to leverage resources. One such success occurred in Pittsburgh when the Port Authority provided air brake training for their employees and filled the empty seats with Duquesne Light fleet maintenance mechanics.

Regardless of the industry they serve, these statewide labor-management training partnerships create economies of scale that enable industry stakeholders to address their workforce challenges and create opportunities to access additional funding. Once employers have identified common training needs, each partnership can run multiple classes across the state. The Pittsburgh and Philadelphia transit partnerships have collaborated with private industry to offer classes and further reduce training costs.

# Other Successful Labor-Management Training Partnerships

## Utah Transit Authority & Amalgamated Transit Union Local 382

Utah's Intermountain Transit Career Ladder Partnership is a joint labor-management initiative, created with assistance from the Transportation Learning Center. The Intermountain Partnership links together the Salt Lake City-based Utah Transit Authority (UTA), Amalgamated Transit Union Local 382 (which spans most of Utah) and smaller properties throughout the state. Utah Transit Authority (UTA) and ATU Local 382's partnership is yet another testament to the strength and versatility of collaborative training arrangements. Both labor and management continue to benefit not only from a structured apprenticeship program, but also from the positive working relationship that maintaining a training partnership necessitates.



UTA, ATU, and their partners created their Joint Apprenticeship Training Committee (JATC) in 1998 for bus maintenance technicians. Within only two months, the apprenticeship program was sufficiently well-established to be registered with the US Department of Labor. The JATC meets monthly to collaboratively address and resolve issues as they arise. To date, over 115 apprentices have graduated from the program. Workers participating in apprenticeship benefit from classroom and on-the-job training designed to meet their individual needs.

Labor and management members of the Intermountain partnership report increased levels of trust, honesty and civility as outcomes of the close working relationships they have established through the partnership. Working together on creating and implementing the apprenticeship program laid the foundation needed to establish a broader, positive labor-management relationship at UTA and its sister agencies throughout the state.

The Intermountain Transit Career Ladder Partnership, the entity created as a home for the Utah partnership, operates as a nonprofit organization governed by a Board of Directors made of equal numbers of labor and management representatives. A major goal of Intermountain Transit is to develop training opportunities for smaller transit properties throughout the state. Using a nonprofit to run the partnership is effective in advancing this goal because it pools the resources from the participating agencies to assess workforce skills, identify new skills needing training, and develop and deliver new curriculum.

Joint work groups meet regularly to analyze and evaluate training needs. There are currently work groups operating in the fields of bus maintenance, light rail/commuter rail maintenance and facilities maintenance. Over 1400 training opportunities have been provided by the UTA-ATU partnership, resulting in over 21,000 training hours for operators as well as bus and rail mechanics.

Mass transit, a thriving industry in Utah, now succeeds even better due to its coordinated system of workforce training. Utah ranks tenth in the nation in its reliance on mass transit, with its transit industry employing nearly 3000 workers.

## **Tri-County Metro (TriMet) & Amalgamated Transit Union Local 757**

The labor-management partnership in Portland, Oregon developed a joint apprenticeship program for bus mechanics in 1982. Since then, the apprenticeship program has grown to include seven maintenance crafts including heavy duty bus, plant maintenance and rail vehicle mechanics and fare equipment, overhead, signal and traction-substation technicians. All entry-level service workers can bid into an apprenticeship program based on clear qualifications (age, mechanical aptitude test scores, Commercial Drivers License) and seniority. The joint labor-management apprenticeship committee defines both classroom hours and on the job learning needs to achieve full competence in each specific craft. The joint apprenticeship committee has also negotiated an articulation agreement with Mount Hood Community College so that apprentices earn college credit for technical classes related to learning their craft. At the end of a typical three year apprenticeship workers have earned more than the required technical credit hours for an Associate's Degree and only needs to supplement these with general requirement classes.

## **Washington Metropolitan Area Transportation Authority (WMATA) & Amalgamated Transit Union Local 689**

Transit elevators and escalators face unique challenges not commonly encountered by traditional building vertical transportation systems, including exposure to weather elements, vandalism, misuse, and a high volume of users, which creates a heightened need for preventive elevator and escalator maintenance in transit environments. Major metropolitan areas, such as Washington, DC and New York City, average 500,000 users daily for 20-24 hours of the day, seven days a week. To respond effectively to these maintenance challenges and to ensure safe, reliable elevators and escalators for its customers, WMATA entered into an agreement with ATU Local 689 and the District of Columbia Department of Employment Services Apprenticeship Council in 2003 to establish a joint apprenticeship program to train transit elevator and escalator maintenance technicians. Now in its sixth year of operation, the program provides students with the unique skills necessary to repair and maintain the vertical transportation systems WMATA customers rely on. The partnership's apprenticeship program provides participants with a strong set of electrical and mechanical technical skills that are applicable not only to vertical transportation maintenance, but which are directly transferable to other areas of transit, including the bus and rail occupations.

## **New York City Transit & Transport Workers Union Local 100**

In New York City, Transport Workers Union (TWU) Local 100 and New York City Transit (NYCT) have been working together for over seven years to bring employees the skills they need to effectively maintain and operate the largest transit system in the United States. In 2002, they negotiated a new training apparatus, the TWU 100/ NYCT Training and Upgrading Fund (TUF).

Governed by an equal number of trustees from management and labor, the TUF is an expansive joint training initiative which also includes working relationships with the City University of New York (CUNY) and several other outside education providers. The TUF has issued over 12,000 certificates of completion since 2004 and provided more than 38,000 training opportunities to transit employees since its inception in 2002.

TUF offers a wide array of programs including technical training in electronics, apprenticeship and pre-apprenticeship programs in a number of fields, and classes in computer and language skills. Moreover, TUF supports employees' career ladder mobility through GED funding, civil service exam test preparation support, and college certificates in transit through its relationship with CUNY.

Local 100 members have found the training opportunities offered by to be TUF invaluable. NYCT has seen enormous benefits as well. As the New York transit system modernizes, TUF is helping to ensure that workers keep pace with new technologies constantly emerging in the transit industry. By helping employees become – and stay – highly skilled, TUF helps NYCT provide the highest possible quality of service to its customers and maximize the value of its capital investments and new equipment.

# Partnership Successes

In February 2002, the Keystone Transit Career Ladder Partnership enrolled several third-class bus mechanics and helpers represented by TWU Local 234 in upgrade training at the Southeastern Pennsylvania Transportation Authority in Philadelphia.

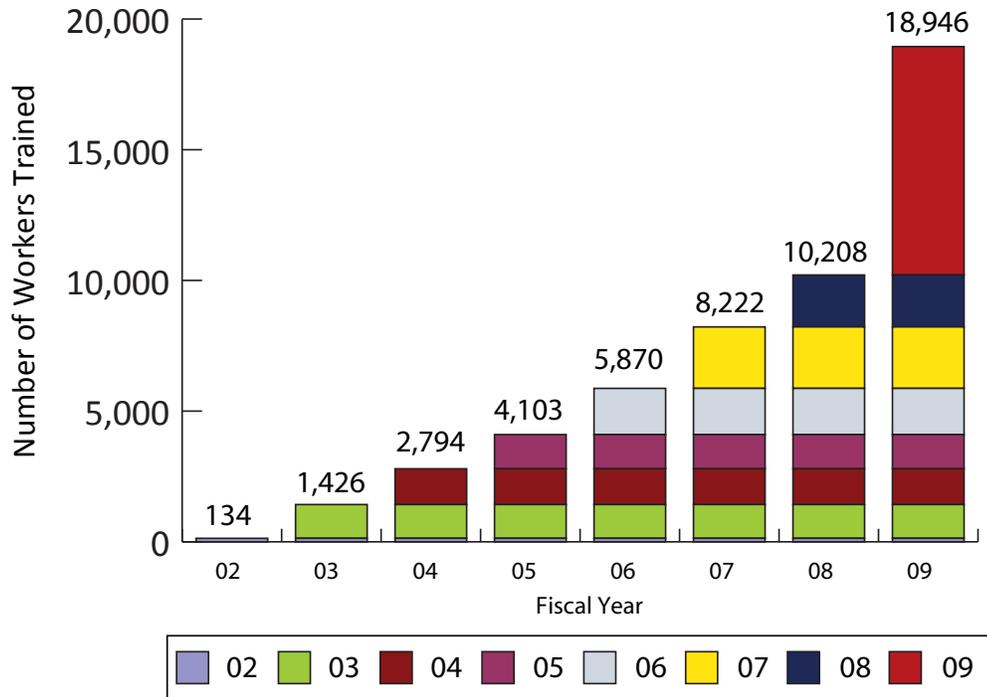
That initial five-week class represented the beginning of training under the Center's transit training partnership program. Funds for the training came from the Pennsylvania Department of Labor and Industry; a policy committee of equal numbers of labor and management representatives decided on how to use the funds.

More than seven years later, the Transit Technology Career Ladder Partnership Training Program (the name Congress bestowed on the effort) has provided 18,496 training opportunities for transit workers across the country.

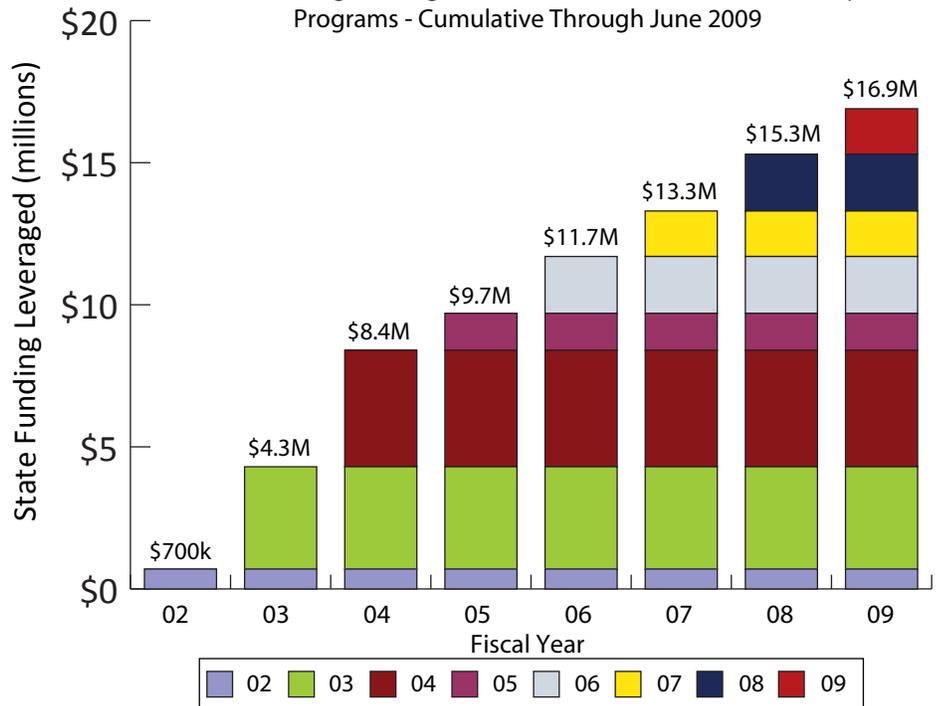
As was the case with that initial class in Philadelphia, funds for the training came largely from non-transit sources. In many cases, state departments of labor provided funds. Some funding came from the US Department of Labor. In all, the Center has leveraged \$16.9 million through June 30, 2009.

In that same time frame, the Center received \$3.9 million from the US Department of Transportation. For every dollar of federal transit money received, the Center has leveraged \$4.33 million.

Training Leveraged by Center Programs - Cumulative Number of Workers Trained Through June 2009



State Funding Leverage for Transit Career Ladder Partnership Programs - Cumulative Through June 2009



# How Labor-Management Training Partnerships Work

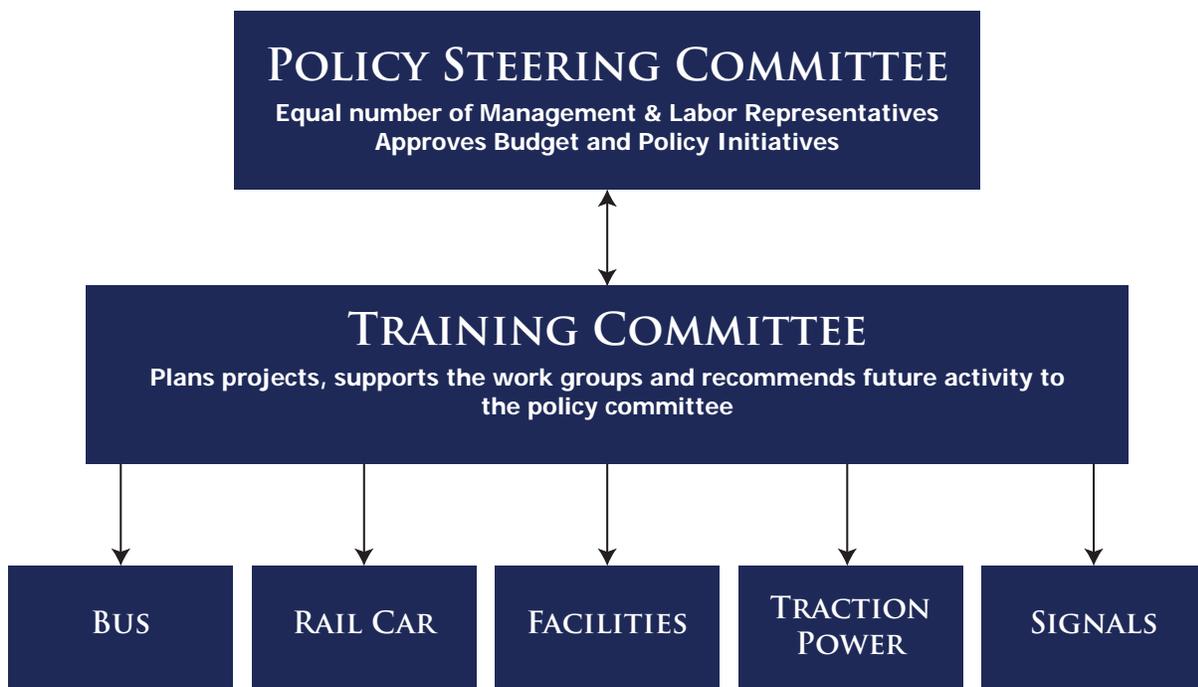
The Transportation Learning Center provides support for a partnership structure led by a Policy Committee of top leadership of the union and transit agency management. In larger organizations the structure includes a joint Training Committee of shop floor leaders capable of using consensus methods and data-based decision-making, as well as the ability to measure the effects of training based on improvements in key areas of performance. Functioning Work Groups of management and labor Subject Matter Experts from major maintenance classifications are formed to identify and document the job tasks that are being performed in each job.

The Work Groups first develop a job and task analysis for each of the targeted classifications. Utilizing the tasks identified in the job analysis, a survey is developed that lists the tasks related to the desired skill level. Employees rank their ability to perform each task using the scale below:

- N/A - Unaware of this type of work
- 1 - Aware of this type of work
- 2 - Able to perform this type of work with supervision
- 3 - Able to perform this type of work independently
- 4 - Able to instruct others in this type of work

This survey method provides a mechanism for comparing current employee knowledge, skills and abilities to those required for optimum performance. The Training Committee leads the effort to promote and implement the training needs survey to the workforce in targeted classifications. The Policy Steering Committee approves the design, promotion and implementation process for the training needs survey. The Center facilitates the implementation process.

Once the survey implementation process has been completed, the results are analyzed and a draft report is issued for discussion in the appropriate Work Group. The Work Groups review the data and discuss the implications for training. The resulting training plan developed by the Labor-Management Transit Training Partnership identifies training priorities, training instructional strategies, methods of evaluating training results, cost of delivery, as well as options for providing training by existing training staff and developing subject-matter experts as trainers.



# The Process

## Industry Developed Standards

The Center has facilitated the development of industry-recognized training standards for both bus and rail through the work of joint labor-management committees of subject matter experts.

Current standards include the following:

### Bus Occupations:

- Brakes
- Diesel Engines
- Electronic Diesel Engine Diagnostics
- Transmission and Driveline
- Compressed Natural Gas
- Suspension and Steering
- Heating, Ventilation and Air Conditioning
- Preventative Maintenance

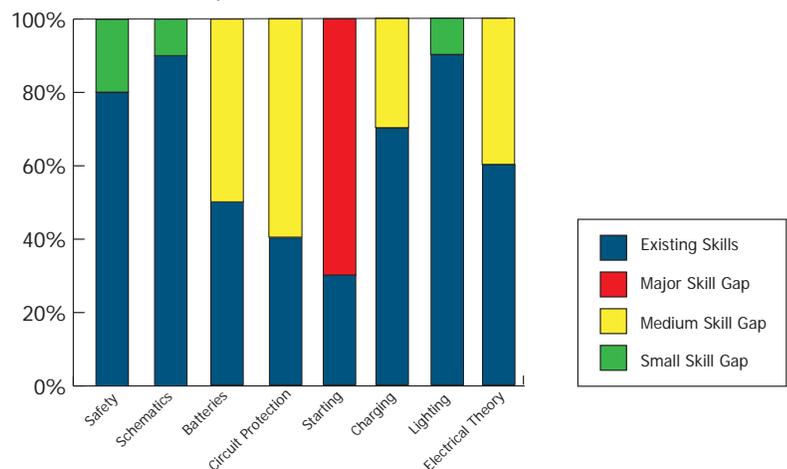
### Rail maintenance occupations:

- Elevator/escalator technician
- Rail vehicle mechanic
- Signals maintainer
- Traction power technician

## Skill Gap Analysis

The Center helps transit systems and their unions establish a participative process for comparing current skill levels to the recommended levels in each subject area. With guarantees of confidentiality, workers are surveyed to determine their actual skill levels against the national targets. Mapping current skill levels against national standards produces a Skill Gap Analysis (see diagram). Expert joint workgroups can use the Skill Gap Analysis to prioritize local training efforts.

Chart One: Skill Gap Analysis Identifies Training Priorities  
Example: Bus Electronics



## Courseware Validation to a National Standard

The training standards have been coupled with the development of a courseware validation process funded through TCRP to create a system in which individual transit agencies can compare their current courseware to the national standard.

This self-evaluation process is facilitated by the Center. When completed an agency knows in what areas their courseware is strongest and in what areas there are deficiencies which can be addressed either through creating new courseware, supplementing current courseware or by taking advantage of the courseware sharing network which the Center is developing.

## Courseware Sharing Strengthens the Transit Industry

Once courseware is validated against the National Standard it can be shared amongst all other participating transit agencies. This process saves participating agencies both time and money while ensuring strong training materials for their employees - which both empowers the employee and creates a more reliable transit system.

If implemented nationally the models presented in this publication could be the key to a unified transit industry that delivers consistently strong training across the nation.



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