

Training Session #1

Staff Recruitment and Retention

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October 23, 2023
WI/MN Joint Public Transit Conference
La Crosse, WI





Raise Your Hand

If you wanted to be an
“Influencer” when you
grew up



If you have an Instagram-worthy space at your property

So, What's My Point?

- The world – and the workforce – is changing.
- New strategies are needed to attract and retain workers.

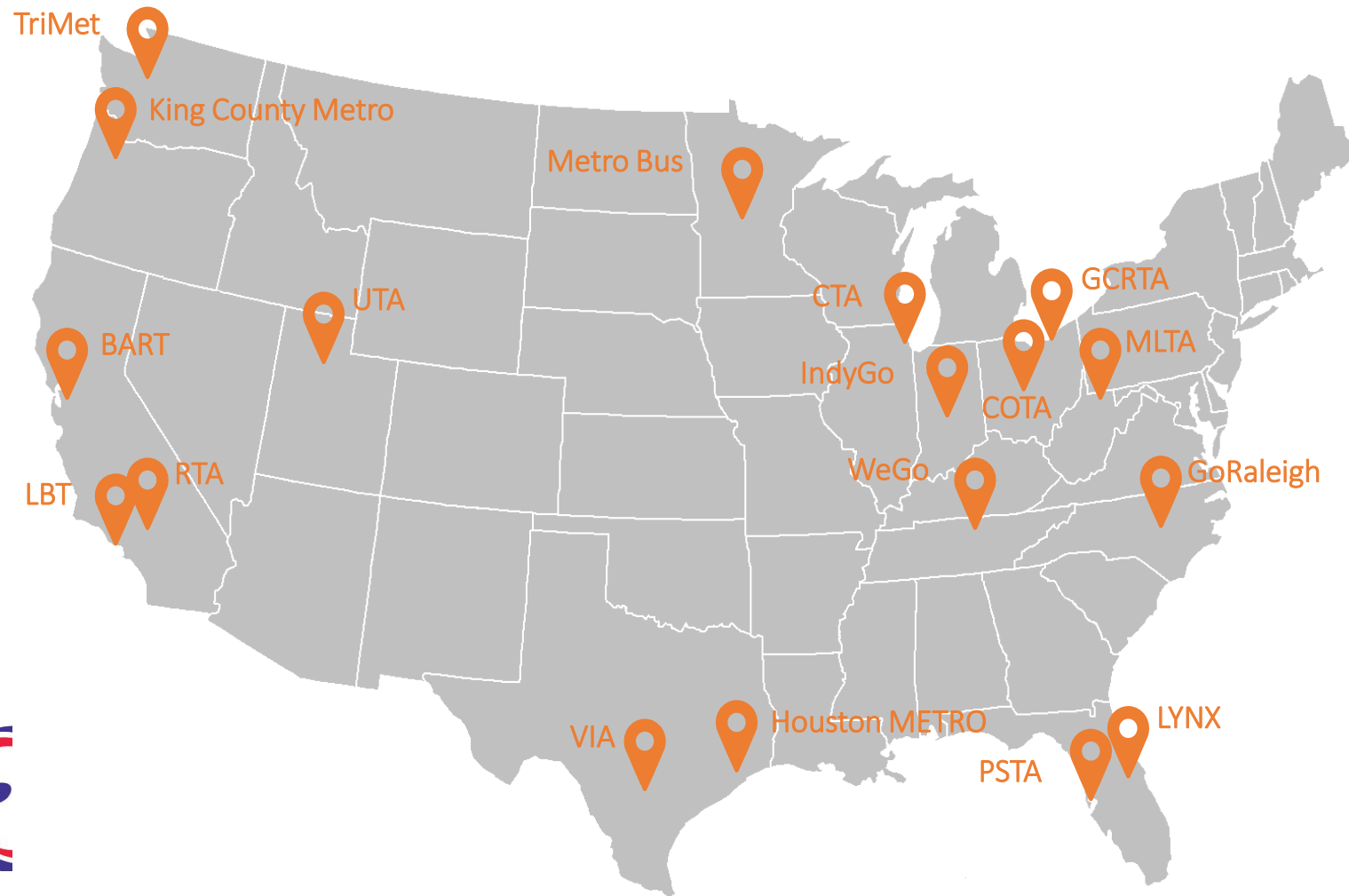
Our Goals for Today

- Share stories and strategies for recruiting, hiring, and retaining workers.
- Leave knowing how to use APTA's workforce development resources and apply takeaways at your organization.

APTA's Transit Workforce Shortage Study

- The study aimed to better understand the transit industry workforce shortage's **causes** and provide best practices for **recruiting, hiring, and retaining** transit operations workers.
- The focus was on helping agencies learn from each other.

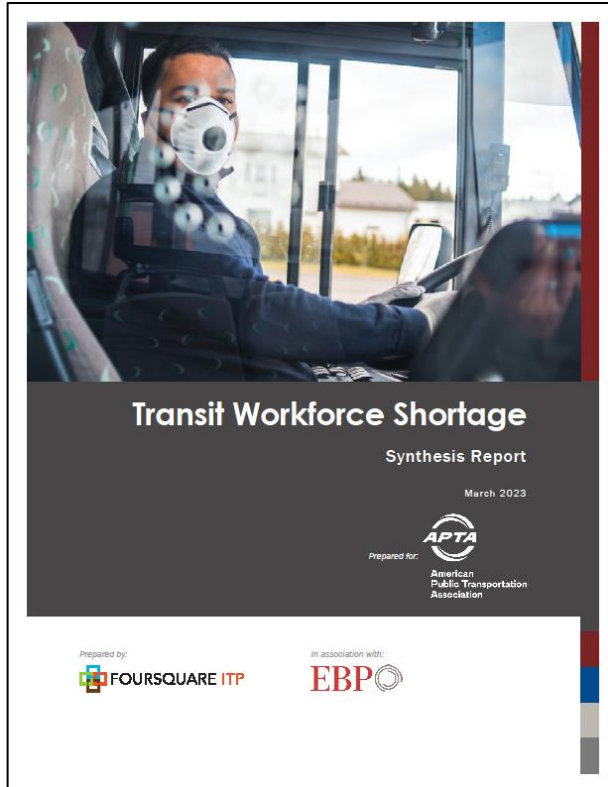
Transit Workforce Shortage Study



- Survey responses from **190 agencies** and over **1,300 transit workers**
- Interviews with staff of agencies across the country
- Interim Report, Synthesis Report, and Toolkit

Transit Workforce Shortage Report

Phase 1 | 190 responding agencies



96%

Experiencing
shortage



Causes:

Retirements

Competition

Job Characteristics

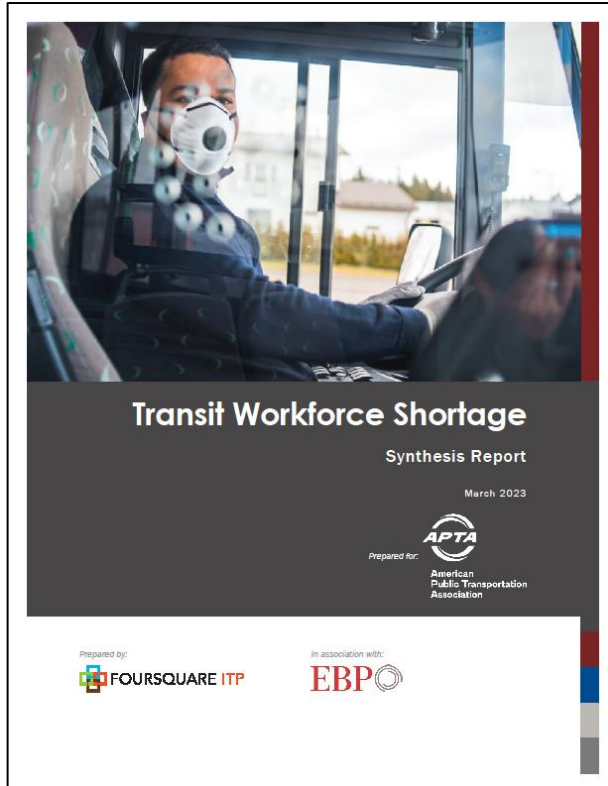
Hiring Time

Transit Workforce Shortage Report

Phase 2 | **1300+ workers responded**

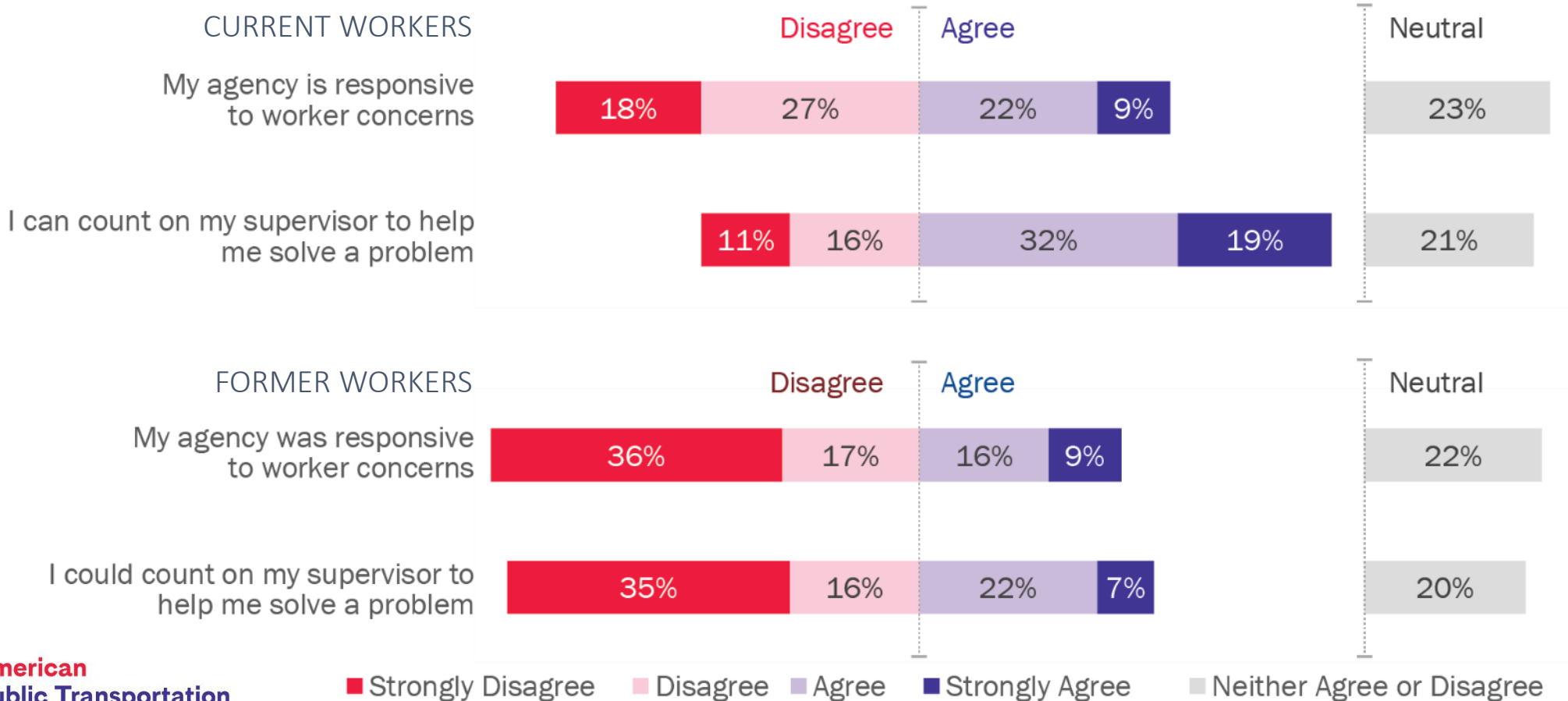
Causes:

- Compensation and work schedule
- Feel unsupported by agency staff and management



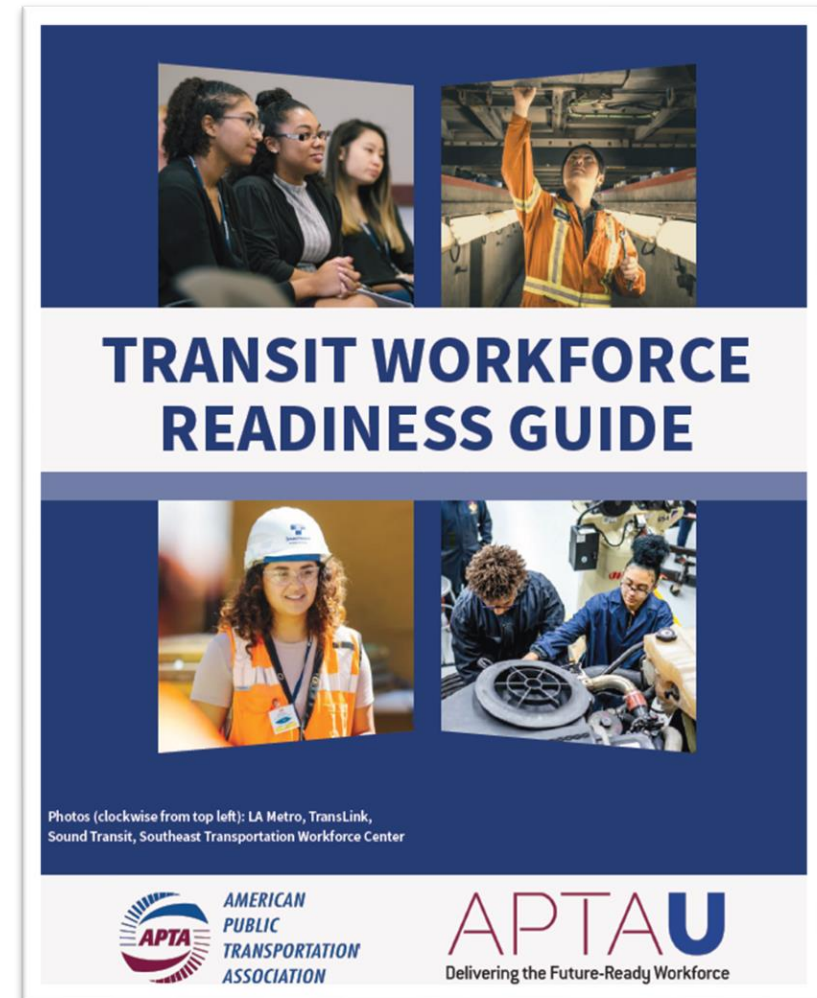
Note: 2x as many departures in first 2 years

Satisfaction with Management Support



Transit Workforce Readiness Guide

- Launched in 2021
- Available on [APTAU](#)
- Interviews, case studies, sample materials, links



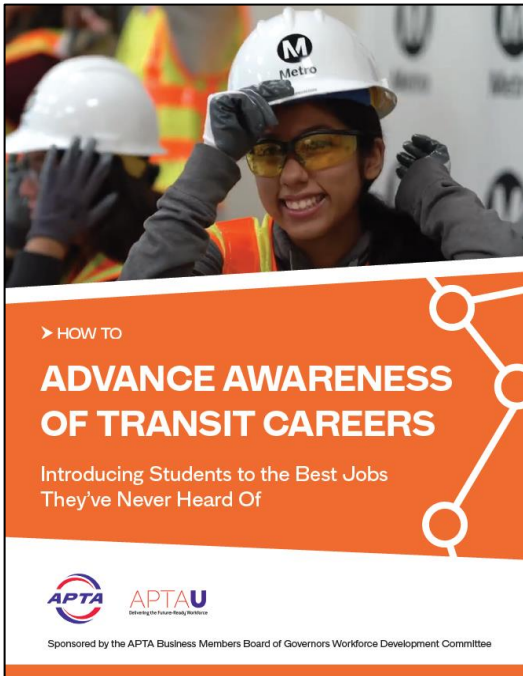
NEW Workforce Development Mini-Guides



- Funded by APTA's Business Members
- 20 pages each
- New interviews, case studies, links, strategies
- Launched in April 2023



Advance Awareness of Transit Careers



Featured Transit Agencies

- King County Metro
- MTA NYC Transit
- LA Metro

Suggested Actions/Activities:

1. Regular facility tours to increase awareness – *“Influencer” lens*
2. Speak to youth and tailor your message to what they care about most
3. Share a list of **every occupation at your agency** at community events, ribbon cuttings, on social media, etc.*

Advance Awareness of Transit Careers

Massachusetts Bay Transportation Authority/Massachusetts DOT		
Massachusetts Department of Transportation (MassDOT) Occupations		
Accounting	Control Center Director Crime and Statistics Analyst Emergency Manager Fire Life Safety Officer Fire Protection Systems Investigator Police Officer Safety Oversight Coordinator Security Officer Transportation Safety Analyst Workplace Safety Specialist	Facilities/Maintenance Facilities Manager Heating Plant Fireperson Highway Maintenance Foreman Highway Repairer HVAC Refrigeration Mechanic Janitor Laborer Maintenance Supervisor Parking Services Director Plumber Structural Manager Warehouse Supervisor
Business	Communication Dispatcher Customer Service Representative Hearing Officers Road Test Examiners	Health Nurse Occupational Health Officer Human Resources Benefits Employee Relations and Programs Human Resources Generalist Performance Reviewer Personnel Officer Staffing
Automotive	Electrical/Electronics Electrician Electronic Technician Inspector Line Repairer Signal Communications Controller Tower Person Traffic Control Equipment Utility Analyst Wire Person	Information Technology Computer Technician Data Analyst/Processing Database Manager Information Officer Safety Data Analyst Webmaster Word Processing Operator
Construction	Engineering Analyst/Engineer Architect Bridge Maintenance Foreman Bridges and Culverts Officer Cartographer Civil Engineer Contract Documents Manager Design and Construction Highway Repairer Inspector Mechanical Engineer Safety Compliance Officer Safety Specialist/Director Structural Manager Urban Designer	Legal Civil Rights Investigator Claim Examiner Compliance Officer Contract Documents Manager Labor Relations Representative Lawyer Legislative Liaison Municipal Affairs Liaison Paralegal Specialist Policy Writer and Analyst Title Review Officer
Real Estate	Environmental Energy Conservation Monitor Environmental Analyst Environmental Engineer Landscape Architect Tree Surgeon	Marketing Customer Communications Event Planner Graphic Designer Marketing Director Photographer
Science		Metals Blacksmith Iron Worker Machinist Metal Work Rail Asset Manager Rail Repairer Sheet Metal Worker Track Laborer Welder
Transportation Operations & Equipment Maintenance		Real Estate Property Management Specialist Real Estate and Asset Manager Science Chemist Laboratory Supervisor Materials Tester Training/Education Archivist/Librarian Records Analyst Research Analyst Training and Development Instructor Transportation Operations & Equipment Maintenance Bus Operator Dispatcher Ferry Operator Heavy Equipment Operator Inspector Motor Person Operations Control Center Director Paratransit Coordinator Train Operator Trolley Motor Person Truck and Tractor Driver

- Accounting
- Automotive
- Business
- Construction
- Criminal Justice
- Customer Service
- Diversity/Equity/Inclusion
- Electrical/Electronics
- Engineering
- Environmental
- Facilities/Maintenance
- Health
- Human Resources
- Information Technology
- Legal
- Marketing/Communications
- Metals
- Real Estate
- Safety/Security
- Science
- Training/Education
- Transportation Operations & Equipment Maintenance

Recruit & Hire Transit Workers



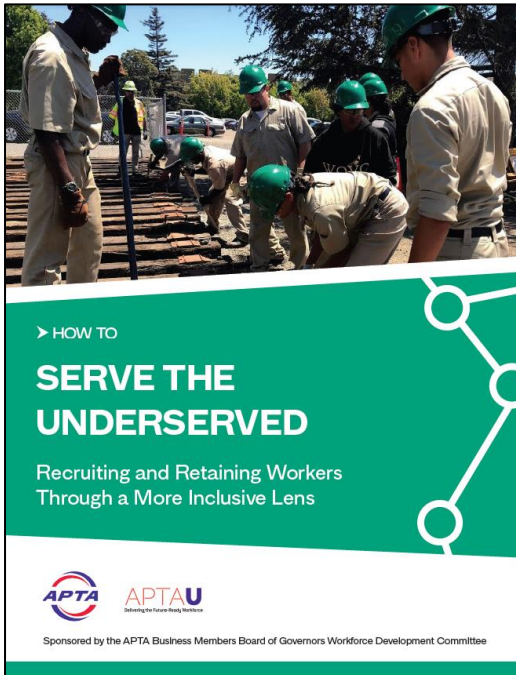
Featured Transit Agencies

- DART (Dallas)
- Pierce Transit
- MBTA
- BART
- New Jersey Transit
- LA Metro
- TriMet
- PSTA
- CTA
- JTA

Suggested Actions/Activities:

1. Promote transit as a high-tech, community-building, equity-creating, carbon-reducing industry that makes people's lives better
2. Ensure job applications are user-friendly (view through lens of the underserved)
3. Train hiring managers to hire for soft skills – they can teach the transit-specific skills

Serve the Underserved



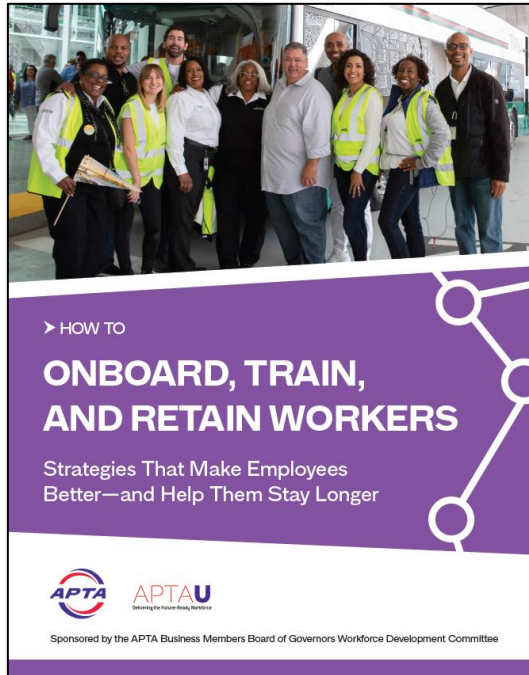
Featured Transit Agencies

- Bay Area Rapid Transit
- King County Metro
- LA Metro
- JTA

Suggested Actions/Activities:

1. Reach out to HBCUs
2. Consider wrap around services (mental health, housing assistance, etc.)
3. Add lifestyle classes to your training budget (financial literacy, etc.)
4. Ensure new employees have a buddy or mentor for the first 2 years

Onboard, Train & Retain Workers



Featured Transit Agencies

- Monterey-Salinas Transit
- King County Metro
- New Jersey Transit
- Metro Transit (Twin Cities)
- HART
- CTA

Suggested Actions/Activities:

1. Make training a budget priority
2. Make employee engagement a personal priority (lunch, etc.)
3. Make career pathways visible and promote from within

Transit Workforce Shortage Toolkit

Purpose: Provide guidance on assessing and advancing workforce management activities.

Step One: Assess current processes and base metrics around recruitment, hiring, and retention

LEAD RECRUITMENT/EMPLOYMENT PROCESS WORKSHEET FOR AGENCIES		
scouting	Agency Answer	Notes (potential issues, barriers within process)
PROCESS COMPONENTS	Advertising: How do potential applicants hear about a job? List all of the places your agency advertises job postings. These can include print, online, and in-person advertising activities.	
	Partnerships and Referrals: Is there anyone or any organization who helps identify potential applicants? List any partnerships your agency uses to recruit applicants.	
	Applications: What does the employment application look like? How do potential employees submit applications? Describe the length, format, and content of an employment application.	
	Requirements: What are the minimum requirements for operation workers? How are they explained to applicants? List the requirements for employment and how or when they are communicated to applicants.	
METRICS	How many potential applicants see or engage with a job posting and/or engage at a recruitment event?	
	How many potential applicants begin an application?	
	How many potential applicants begin an application but do not complete an application?	
	How many applicants complete an application?	
	How many applicants are invited to an interview, accept the interview, and attend the interview?	
ing	Agency Answer	Notes (potential issues, barriers within process)
PROCESS COMPONENTS	Applicant Screening: What are the steps taken to review applications? How long does the process take, and who is involved? List the steps and parties involved in the application review process.	
	Testing Requirements: What testing requirements exist for employment? How long does it take for an applicant to complete testing requirements? List the specific tests (drug, physical, background, etc.). Note where or how these tests are administered and how long it takes to return results.	
	Offers of Employment: How are applicants offered employment? What is the overall timeline from when a typical applicant applies to when they are offered employment to when they begin work and earn their first paycheck? List all the relevant steps to extend an offer of employment and complete the hiring process.	
	Training and Onboarding: What training and onboarding are offered to new employees? How long is each component of the training and onboarding program? How long is the time between the acceptance of employment to the start of training and onboarding? Explain the components of the training and onboarding process, where these activities occur, and how	
	at work from assaults, from contracting COVID-19, from exposure to the elements, etc.? If an incident occurs, how is the employee supported by management and/or peers? Describe the policies, procedures, and/or physical designs in place to protect employees.	

Transit Workforce Shortage Toolkit

Step Two: Self-assess using problem statements and recommended strategies

- Recruiting
- Hiring
- Training & Onboarding
- Working Conditions/Policies
- Agency Culture & Morale

	Problem Statement	If you're having this problem, see these strategies below
RECRUITING	We don't know how many people apply for a job, interview, complete background checks/other tests, are offered a position, and/or ultimately accept.	R1
	My agency doesn't get enough applicants.	R3 , R4 , H2
	My agency can't keep up with the volume of recruiting work that we have (posting and advertising positions, reviewing and responding to applications, etc.).	R2 , H1
	We have trouble getting potential applicants to complete and submit applications.	R5
HIRING	My agency has difficulty conducting enough interviews for operations positions.	H1 , H2
	Many of our applicants disengage before we can make an offer of employment.	H2 , H3 , H4
	We lose qualified applicants because of difficulties completing and passing various types of tests and checks.	H4 , T1 , T4
	A high proportion of workers who are offered positions don't accept or don't show up for training.	H3 , T1 , W3 , W6
EXISTING WORKFORCE	Many workers who accept offers of employment don't complete training.	T3
	Many new workers quit within the first year of beginning their regular duties.	T2 , T5 , W6
	My agency would like to improve worker schedules, but we're not sure how to go about it or what changes would be most effective.	W1
	My agency is having trouble hiring and retaining operators because of worker dissatisfaction regarding schedule.	W2
	Junior operators are leaving because they are dissatisfied with their work schedules.	W2 , W4
	Workers at my agency feel they are exposed to an unacceptable level of hazard on the job.	W5
	My agency is losing workers to other employers.	W6
	Low employee morale is affecting worker retention and absenteeism.	C1 , C2

Transit Workforce Shortage Toolkit

Step Three: Conduct Capability Maturity Assessment

1. Initial
2. Repeatable
3. Defined
4. Managed
5. Optimizing

CAPABILITY MATURITY ASSESSMENT		STRATEGY MATURITY STAGE				
		1 INITIAL	2 REPEATABLE	3 DEFINED	4 MANAGED	5 OPTIMIZING
CHARACTERISTICS		The work process is poorly controlled and reactive, relying on individual efforts on individual bases—the highest risk of failure and greatest quality variability.	The work process is documented well enough that repeating the process the same way on a project basis is possible even for someone who has never done it before. Furthermore, work can be planned in advance and monitored at a rudimentary level.	The organization's work process is well-defined and adopted in a standard way. Individual projects tailor their processes to the standard. Projects can verify and validate work integrity, and organizations can integrate the work of related projects.	The organization quantitatively tracks process activities using standard metrics, such as hours worked, activity clearance, or percent complete. As a result, complex organizational integration and performance management are possible.	The organization engages in process analysis. As a result, management and staff have sufficient visibility into relationships between processes and outcomes so they may collaborate for continuous improvement.
	WORKFORCE MANAGEMENT EXAMPLE	Tom has been working in human resources at The Transit Agency for twenty years. He handles the recruitment process with one or two assistants and knows all of the forms and procedures in his head. Unfortunately, it's not unusual for long lags in hiring, and everyone is worried about what happens when he retires.	Joan joined the Recruiting Division six months ago. Their predecessor left behind a digital checklist, so Joan successfully handled multiple application reviews and hiring actions from start to finish when her colleague was on extended leave. When the Operations and Planning team leads discussed their staff needs for the next year, Joan and her colleagues could not say if they could clear the number of applications needed to hire that many people.	The Transit Agency's team leads developed a standard process for determining workforce needs. The process involves each technical team estimating the number of people they need and human resources estimating their ability to clear applications and hiring actions. Progress is discussed during regular meetings, but with limited organizational visibility into the system's effectiveness.	The Transit Agency uses software to actively forecast and track workforce needs and recruitment/hiring progress. Management is able to see if each team's estimated needs are realized and whether human resources is making appropriate progress. Organizational visibility into the workforce management system's effectiveness is strong, and corrective actions occur when issues arise.	The Transit Agency's management analysts regularly review the organization's performance towards its workforce management needs. Together with team leads, they assess where efforts are ineffective and where capacity upgrades would yield better results. Analysts meet with team leads quarterly to discuss progress, external trends, and plans for the future.

Capability maturity was originally developed by researchers at Carnegie Mellon University as the Capability Maturity Model (CMM). Now known as the Capability Maturity Model Integration (CMMI), it has been used for organizational performance improvement across many industries including aerospace engineering, government, and any other organization that relies on processes to conduct its work. For further information, see [Quality.Sabb.2006_Assessment_in_the_National_Aerospace_and_Space_Administrations](#).

Foursquare ITP

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Toolkit Example


Problem Statement	Strategies	Capability Maturity
<p><i>“A high proportion of workers who are offered positions don’t accept or don’t show up for training.”</i></p>	<p>H3: Audit and streamline hiring process.</p>	<p>4 (managed) – shortened hiring process from Y to X steps</p>
	<p>T1: Implement early training programs.</p>	<p>2 (repeatable) – provide new hire training, opportunity for more</p>
	<p>W3: Expand full-time work.</p>	<p>1 (initial) – requires policy change</p>
	<p>W6: Restructure compensation and benefits to improve retention.</p>	<p>3 (defined) – offering hiring and retention bonuses; just started tracking effectiveness</p>


Toolkit Handouts

SELF-ASSESSMENT

APTA TRANSIT WORKFORCE SHORTAGE TOOLKIT

HIRING									
PROBLEM STATEMENT	IF YOU'RE HAVING THIS PROBLEM, SEE THESE STRATEGIES BELOW								
<p>My agency has difficulty conducting enough interviews for operations positions.</p>	<p>H1: Expand interview capacity.</p> <p>The interview process can often be cumbersome for human resources departments, especially if interviews are long and personnel is limited. During winter shortages, agencies could consider shortening interviews with potential candidates to speed up the process. Shortening interviews allows for the capacity to conduct more interviews and speed up the hiring process. Interview capacity can also be expanded by increasing the number of people who can conduct interviews and make offers. This strategy would alleviate the burden on human resources personnel with limited capacity. Holding open interviews at advertised times or regular intervals could lighten workloads for human resources personnel by eliminating the scheduling process for potential candidates.</p>								
	<p>H2: Hold mass hiring events.</p> <p>In the event of increased demand for a large amount of new personnel, agencies can hold mass hiring events. Events should include portions of the hiring process that can be conducted all at once. These could include applying for a position, participating in an interview, receiving a contingent offer, and taking a drug test throughout the course of one event. It is important to choose convenient locations or latch onto existing events (such as fairs or community events) where the desired population is already in attendance.</p>								
	<p>H3: Audit and streamline the hiring process.</p> <p>Agencies can look internally at their hiring process to identify delays and chokepoints in the process. The hiring process can be reevaluated by asking questions such as: How long does it take to complete the hiring process on average? What are the specific steps an applicant must take? How are the process and their progress communicated to the candidate? What or where are the chokepoints in the process? Answering these questions can guide agencies to create a streamlined hiring process that can shorten the time needed to hire new personnel and create more flexibility. It can also help capture prospective employees who accept other positions in the time that it takes for the transit agency to review their application.</p>								
<p>Many of our applicants disengage before we can make an offer of employment.</p> <p>Additional strategy: H2</p>									
<p style="font-size: x-small;">APTA TRANSIT WORKFORCE SHORTAGE TOOLKIT</p> <table border="1"> <thead> <tr> <th>PROBLEM STATEMENT</th> <th>IF YOU'RE HAVING THIS PROBLEM, SEE THESE STRATEGIES BELOW</th> </tr> </thead> <tbody> <tr> <td> <p>We lose qualified applicants because of difficulties completing and passing various types of tests and checks.</p> </td> <td> <p>T1: Implement early training programs.</p> <p>To avoid high attrition rates from new hires who do not show up on their first day of work and to capture potential new hires who would otherwise lack necessary certifications, agencies can implement changes in their training programs that prioritize retention. For example, one of the strategies agencies could implement includes "early start" training programs in which new hires complete the administrative components of onboarding, familiarize themselves with the agency's culture and operations, and begin to receive a paycheck and benefits right away. 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In the interest of fairness, agencies pursuing a change policy should offer existing employees who are already working part-time the option to convert to full-time before extending any full-time offers to prospective hires.</p> <p>W6: Restructure compensation and benefits to improve retention.</p> <p>Agencies today have to compete with both transportation and non-transportation industries as the economy has rebounded from the COVID-19 pandemic, and there are record-low unemployment numbers. Carefully structured compensation increases can be an effective tool to improve retention throughout agencies. Although pay is an important factor in the retention of workers, agencies should also consider enhancing their benefits packages to attract new employees. Non-wage benefits that would make a big difference include on-site childcare and continuing education reimbursement programs, making starting and staying at an agency easier.</p> <p>In terms of pay, agencies could also consider other incentives for retention, such as hiring bonuses and/or retention bonuses. Another strategy that has proven to be successful at retention is making training pay equal to new operator pay, with a raise after the first few months on the road. 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apta.com/shortage



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Instructions

1. Select a group discussion leader
2. Identify a writer & spokesperson
3. Prepare and deliver a report out

What's Next?

1. Download the resources I've shared with you today.
2. Begin your self-assessment.
3. If you're an APTA member, invite my team to speak to your leadership team (in-person or virtually).

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