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A Process for Developing Transit Agency Comprehensive Training Plans

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A PROCESS FOR DEVELOPING TRANSIT

AGENCY COMPREHENSIVE TRAINING PLANS

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FINAL REPORT

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16. Abstract

This report addresses a project whose goals were to create, use, and disseminate information on a process for developing transit agency comprehensive training plans (i.e., plans that contain the training needs for all positions in an organization). The report considers the following:

- The importance of agency training plans and the need for an appropriate process to produce one.
- Information on the project that was undertaken to design and use an appropriate transit agency training plan process.
- The design, components of, and rationale for the training plan process selected for this project.
- Application of the selected training plan process to three Pacific Northwest transit agencies and the results this produced.
- The utility of the selected training plan process for transit agencies.
- The attempt to disseminate information on the training plan process to transit managers throughout the United States.

The findings suggest that this training plan process is a highly useful tool for designing, implementing, and managing a transit agency's comprehensive training program.

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EXECUTIVE SUMMARY

This report addresses a project whose goals were to create, use, and disseminate information on a process for developing transit agency comprehensive training plans (i.e., plans that contain the training needs for all positions in an organization). The report considers the following:

- The importance of agency training plans and the need for an appropriate process to produce one.

- Information on the project that was undertaken to design and use an appropriate transit agency training plan process.

- The design, components of, and rationale for the training plan process selected for this project.

- Application of the selected training plan process to three Pacific Northwest transit agencies and the results this produced.

- The utility of the selected training plan process for transit agencies.

- The attempt to disseminate information on the training plan process to transit managers throughout the United States.

The findings suggest that this training plan process is a highly useful tool for designing, implementing, and managing a transit agency's comprehensive training program. Field tested at three different transit agencies (Salem Transit, Seattle Metro and Rogue Valley Transportation District), the plan development process relies on a set of graphic aids for the identification of job specialties, personnel development stages leading to these specialties and needed training to ensure appropriate organizational staffing in terms of trained personnel. Each field test entailed development of a training plan for the organization employing a participatory process with agency management personnel. The resultant plans are being utilized by these agencies in the scheduling and implementation of training programs. Interviews with agency managers indicate that the experience with the plans has been productive and effective.

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I. INTRODUCTION

This report details the procedures followed and the results obtained for the project titled "A Process for Developing Transit Agency Comprehensive Training Plans". It represents completion of this project by the Portland State University Transit Research and Management Development Center with the aid of a Section 11 grant it received from the Urban Mass Transportation Administration, Office of Technical Assistance, University Research and Training Program.

The design of this report reflects an effort to make the project's results immediately usable by other transit agencies throughout the United States. The sections of this report are:

- Project Focus and Goals

- Project Structure

- Phase 1: Initial Research

- Phase 2: Application of the Training Plan Process to Transit Agencies

- Phase 3: Dissemination of Information on the Process to the Transit Industry

- Conclusion.

Transit Managers should be able to use this information to create a comprehensive training plan for their agencies.

Daniel E. O'Toole was the Principal Investigator on this project. James Marshall provided valuable assistance to the project, particularly in its early stages. Others who contributed signficantly to the successful conclusion of this project include:

- Gordon Aoyagi, General Manager, Salem Area Transit (Oregon), Sherman Flogstad, General Manager, Rogue Valley Transportation District (Oregon), and Monty Lish, Manager of the Safety and Training Division, Seattle METRO (Washington), whose support and willingness to experiment made this project a reality.

- Transit managers in Salem Area Transit, Rogue Valley Transportation District, and Seattle METRO who, along with Mr. Aoyagi, Mr. Flogstad, and Mr. Lish, squeezed time from busy work schedules in order to participate in the project.

- The staff at the Portland State University Transit Research and Management Development Center, most notably Larry Mason and Denise Penner for their respective contributions of computer graphics and logistics support.

II. PROJECT FOCUS AND GOALS

A. Project Focus

The transit industry clearly recognizes the contribution training can make to the operation of a transit agency (1). Among the potential benefits of training are:

- Improved performance from employees;

- Greater employee productivity and effectiveness;

- Increased employee motivation;

- Improved employee self-images leading to lower absenteeism; and

- Manpower development through employee advancement (2).

Training benefits often extend beyond those who receive the training. For instance, more skillful managers yield productivity gains for the agency through improved work methods and more highly motivated employees. Many agencies find that training is an important component of their attempt to respond to fiscal stress. However, achievement of these potential benefits from training is not automatic. Careful planning and management of all training are required. The training efforts must be targeted to meet the specific needs of various employees in the organization. The overall training program must be managed so that the employees receive the appropriate training in an effective and timely manner.

A comprehensive training plan which systematically identifies and assesses all of a transit agency's training needs and facilitates management of its training effort is a vehicle for accomplishing the planning and management that are necessary for a successful training program. Such a plan is especially important in an era of increasingly scarce resources because it helps maximize the productivity of funds so invested. However, development of such a training plan can be difficult, particularly in large, complex transit agencies. Among the factors which may impede

1. For instance, see Byron Lewis, "Improved Training for Transit Personnel, " Transit Journal 3, no. 1 (January 1977): 97-100.
2. Robert C. Lieb, "Managing the Transit Industry's Human Resources," Transit Journal 4, no. 3 (Summer 1978): 27-40 contains a discussion of training benefits for transit agencies.

formulation of a comprehensive training plan are lack of clarity or consensus within the transity agency on:

- The agency's organizational units, specific positions within these units, and how the units relate to each other;

- How the training function relates to the agency's goals; and

- Specific training needs, especially those dealing with interdependencies between organizational units.

In addition, time demands required to plan training programs can result in a transit agency continually postponing its development.

A process for developing a training plan which effectively overcomes these potential problems would considerably enhance the probability of such a plan's development, thus promoting more effective management of a transit agency's training efforts. The creation and dissemination of such a process is the focus of this project.

B. Project Goals

This project sought to:

- Create, use, and refine a process managers can use to develop, implement, and manage a comprehensive training plan for their transit agencies.

- Disseminate information on the process to managers throughout the transit industry.

The remainder of this report contains the steps undertaken to achieve these goals, the results they produced, and the implications of this project for the development of training plans for other transit agencies.

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III. PROJECT STRUCTURE

The project structure consisted of the following three phases:

- Initial Research: The gathering of information pertinent to the conduct of the project and the design of the training plan process to be followed.

- Application of the Training Plan Process to Transit Agencies: Use of the process to help initiate the development of comprehensive training plans by transit managers in selected agencies.

- Dissemination of Information on the Process to the Transit Industry: Selection and use of the most feasible and effective communication modes to inform managers in other transit agencies about the process.

Figure 1 is an overview of the major components of each of the above three phases. It provides a guide to the project (see FIGURE 1 on the next page).

Each phase of this project was distinct, and the latter phase(s) drew upon the results of the previous one(s). These factors have influenced the design of this report. The methodology and results of each phase are reported before examining the subsequent phase.

Phase 1: Initial Research

Components

Develop a data base on this region's transit agencies that is pertinent to this project.

Examine souces for existing and advocated transit training processes and topics and develop lists of possible training topics for various levels of transit managers.

Design the training plan process to be followed.

Identify the product to be produced by the training plan process.

Phase 2: Application of the Training Plan Process to Transit Agencies

Components

Obtain the participation of appropriate transit agencies in the project.

Apply the training plan process to the participating transit agencies.

Explanin the process for completing, implementing, and managing the training plan to participating transit managers.

Check the results produced by applying the training plan process with the participating transit managers.

Phase 3: Dissemination of Information on the Process to the Transit Industry

Components

Determine the most feasible and effective modes of disseminating information on the process.

Prepare, test and use disseminating modes.

FIGURE 1. OVERVIEW OF PROJECT STRUCTURE

IV. PHASE 1: INITIAL RESEARCH

A. Description and Overview

Phase 1 consisted of gathering information pertinent to the conduct of the project and designing the training plan process to be followed. Figure 1 depicts the components of this phase. This section of the report details the components of Phase 1 and the results they produced.

B. Methodology

Data Base Development: Phase 1 involved developing a foundation of information upon which to conduct this project. A major element of this foundation was the creation of a data base on this region's transit agencies that is pertinent to the project. Among the information desired on each transit agency was the size of the operation, if it had done a training needs assessment, whether it possessed a training plan for its employees, and if it owned a videotape player. The answers to these questions would help shape the direction of the project. For instance, the frequency of ownership of a videotape player among this region's transit agencies would influence the feasibility of disseminating information on this process via videotape. This data gathering activity was also an opportunity to acquaint this region's transit agencies with the Portland State University Center for Transit Research and Management Development, its role, and current and planned activities.

Development of the data base required several steps. First came the determination of the target region for this project. The transit agencies in the states of Idaho, Oregon, and Washington became the focus of this project. Access to the investigators and project costs were among the principal reasons for selecting this region. The next step involved generation of a list of all transit agencies in this area. Appendix A contains this list. It includes the name and address of the General Manager (and in some cases the Training Officer) for each of the forty-one transit agencies in this region. Creation of a packet that included information on the Portland State University Center for Transit Research and Management Development and a questionnaire that would yield the needed data followed. Appendix B contains a copy of this packet. Copies of the packet were then forwarded to all transit agencies on the list. The data base would result from the collection of the questionnaires and the analysis of the results.

Examination of Sources: Another major category of information necessary for this project concerned training in the transit industry. Answers to the following two questions were needed.

- Are there any processes for developing a training plan in use or advocated in the transit industry?

- What are the training topics recommended for various positions in the transit industry?

The first question involved a search for any existing processes so that this project can avoid "reinventing the wheel" if a suitable approach is already available. The answer to the second question would afford an understanding of current views in the transit industry on appropriate training for various positions. It would also help develop a list of possible training topics for each of three levels of transit management (first line supervisor, middle manager, and top manager). These lists would be used during Phase 2 of this project to help participating transit managers indicate the specific management skills needed for the effective performance of the management positions in their agencies.

The search for answers to the above two questions entailed an examination of various sources, including journals in the transit area and in-service transit training programs. Among the journals covered during this search were:

- ITE Journal (Institute of Transportation Engineers), January 1977 through June 1983.

- Journal of Transport Economics and Policy, 1967 through May, 1983.

- Passenger Transport, July 1982 through June 1983.

- Transit Journal, 1975 through 1978 and 1981.

- Transport, Nov./Dec. 1977 through March/April 1983.

- Transportation, 1975 through 1982.

- Transportation Journal, Fall 1975 through Spring 1982.

- Transportation Quarterly, 1979 through April 1983.

- Transportation Research Forum, Proceedings, 1973 through 1982.

- Transportation Research News, 1974 through 1982.

- Transportation Research Record, 1976 through 1982.

- Transportation USA, 1974 through 1978 and Fall 1980.

The review of in-service transit training programs included an examination of pertinent information from the Urban Mass Transportation Administration, the Southern California Rapid Transit District, Seattle METRO, and Tri-Met (Portland, Oregon). Design of the Training Plan Process: A major task during Phase 1 was completion of the design of the training plan process that would be applied in Phase 2 to the participating transit agencies. The experience of both the Principal Investigator and James Marshall facilitated this task. We had recently created and successfully used a process to help the Portland (Oregon) Fire Bureau develop its comprehensive in-service training plan. The process we developed and used with this organization and the results produced by the participants are documented elsewhere (3).

During Phase 1 the process used for the Portland Fire Bureau was tested for its applicability to transit agencies. The Seventh Annual Washington State Transportation Conference at Pasco, Washington (September 14-16, 1983), offered an excellent opportunity to examine this issue. At this conference the Principal Investigator gave a presentation titled "Developing An Organizational Training Plan". The components of this presentation were:

- Acquaint the audience with the Portland State University Center for Transit Research and Management Development and this project.

- Present and explain the process used to develop the Portland (Oregon) Fire Bureau's comprehensive in-service training plan.

- Solicit the views of the members of the audience on the applicability of the process to transit agencies, potential pitfalls, and possible benefits.

The information gained from this session and from other contacts with transit managers during Phase 1 would be incorporated into the design of the process to be applied in Phase 2 to participating transit agencies.

Identification of the Product: The final component of Phase 1 concerned specifying the product to be produced by applying the training plan process to participating transit agencies. What

3. See James Marshall, Daniel E. O'Toole, and Francis Sargant, "A Visual Approach to Training Plan Development," Public Administration Review 43, no. 2 (March/April 1983): 166-175 and Francis Sargant, James Marshall, and Daniel E. O'Toole, "In-Service Instruction Program Covers All Levels of Training," Fire Engineering 136, no. 3 (March 1983): 20-21.

would each transit agency receive as a result of its participation in this project? Some of the principal concerns here were that participation of a transit agency in the process should:

- Avoid a burdensome time commitment from participating transit managers.

- Produce a product that it can use.

- Provide a clear understanding of the process by the participating transit managers so that they could use it and the product they produce as a result of their participation in this project to complete their comprehensive training plan and then effectively implement and manage it.

C.   Results of the Initial Research

Data Base Development: We received completed questionnaires from twenty-five of the forty-one transit agencies in this region (a 61 percent return rate).   The data collected from this effort indicated that:

- This region contains primarily small transit operations (less than 50 buses), several medium-sized operations (between 50 and 100 buses), and only a few large agencies (over 100 buses).

- Two of the responding agencies (both small) had done a training needs assessment.

- Twelve agencies have training plans.   However, only one covers all employees.   Six plans cover   only operators, while three deal with only operators and mechanics.

- Eight agencies either own a videotape player or have access to one.

This data suggests that few of this region's transit agencies have performed a training needs assessment or have a training plan that covers all employees.   The identification of training needs for transit managers is particularly rare.   Only two plans cover management.   The information also shows that a videotape may not be the most effective way to disseminate information to this region's transit agencies.Examination of Sources: The review of transit-related journals and in-service training programs produced no evidence of any processes for developing a training plan in use or advocated in the transit industry.

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This finding and the information we obtained regarding the existence of training needs assessments and training plans in Pacific Northwest transit agencies suggest two things. First, few transit agencies appear to be able to give sufficient attetion to the tasks of carefully planning and managing a training program that includes all members of the organization. Second, the lack of a process for developing a training plan that accomplishes these tasks may be at least partially responsible for this condition. Such a process would be a new and valuable tool for transit managers.

The examination of sources did reveal a large number of training topics that are recommended for various positions in the transit industry, including managers. This body of recommended training topics reflects a broad view of what is appropriate training for various positions by going beyond the technical requirements of each job. It enabled us to devise a list of possible training topics for each of three levels of transit management (first line supervisor, middle manager, and top manager). Appendix C contains a copy of all three lists. We intended to use these lists during Phase 2 of this project to help participating transit managers select the specific management skills needed for the effective peformance of the positions in their agencies.

Design of the Training Plan Process: The transit managers who attended the session on "Developing An Organizational Training Plan" at the Seventh Annual Washington State Transportation Conference and others who informally reviewed it felt that the process used to help the Portland Fire Bureau develop its training plan was highly applicable to transit agencies. They did not identify any pitfalls that would seriously limit its utility. A number of them were enthusiastic about the potential benefits that could result from its use.

This information convinced us to design the process for developing a transit agency training plan that was similar to the one used with the Portland Fire Bureau. The basis for this design involved a collaborative arrangement between the Principal Investigator and the participants from the transit agency in which the former used the process to facilitate the transit agency participants' creation of the final product. This division of labor would help the transit agency participants view the final product as their creation. It would increase their commitment to the results and foster a successful implementation of them.

The overall structure of the process for creating the final product emphasizes:

- A participative approach. Typically, a group of transit managers would work together to produce the results.

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- Breaking down a complex task (i.e., creation of a comprehensive training plan) into more discrete and manageable units. The final product is the result of a two step process that is described below.

- The use of graphics (charts) to clarify each task and facilitate its completion.

A description of the specific elements of this process follows.

The process that would be applied to the participating transit agencies consisted of the following two steps:

1) Development of an organizational "picture"--the Master Career Path Chart.
2) Use of In-Service Training Matrices to identify specific training needs.

In step 1 the Principal Investigator would help the participating managers from a transit agency devise a large chart that depicted a picture of the organization's structure. As illustrated in the diagram below, this picture consisted of all the agency's depatments or activities (e.g., Operations, Maintenance) placed vertically on the chart and the career path for each department or activity (i.e., the positions in each department or activity) arranged in hierarchical order (e.g., line, first line supervisor, middle manager, top manager) extending horizontally from the name of the department or activity. We have labelled this picture a Master Career Path Chart.

Career Path for each Department/Activity
including title for each Position on the path

The Master Career Path Chart

The construction of the Master Career Path Chart would begin with an identification of all the transit agency's departments or major activities by the participants followed by placing their list vertically on a large piece of chart paper. Next would come the specification of a career path for each department or activity which listed each position by title and in the appropriate hierarchical order on the path. Each career path would then be placed on the large chart paper so that it would extend horizontally from the department or activity name beginning with the title on the path that was at the bottom of that hierarchy. The Master Career Path Chart would be finished when the participants agreed it was correct. The agency's existing organization chart could prove useful in developing this picture.

The Master Career Path Chart contains many positive attributes. Its graphic component reflects the belief that people relate more easily to a visual representation of their agency than to a narrative description, and that their participation can be readily included in the process of developing such a representation. Both factors would foster participants' efforts to produce a usable final product. The final version of the Master Career Path Chart would give the participants access to the agency's complexity. This picture becomes a frame of reference for the participants' creation of the final product. As we will see in step 2, it provides a basis for proceeding to the identification of training topics.

Step 2 would involve using the Master Career Path Chart to help complete the desired final product. This chart would constitute a "checklist" for determining what was needed for a completed comprehensive training plan. It would also be the basis for creation of a graphic device that would facilitate participants' specification of training needs. This graphic device is called the In-Service Training Matrix.

A completed comprehensive training plan would consist of the Master Career Path Chart and one In-Service Training Matrix for each department (or activity) and its corresponding career path on the Master Career Path Chart. Development of these In-Service Training Matrices would begin with the Principal Investigator using the Master Career Path Chart to devise an unfilled matrix for each department or activity on this chart. Each unfilled matrix would be depicted on a piece of large chart paper and would contain:

- The career path for a particular department or activity from the Master Career Path Chart across the top of the page as the horizontal axis; and

- A vertical axis, at the top of which included the name of the department or activity that corresponded to the

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career path on the horizontal axis. All the departments or activities on the Master Career Path Chart would be listed below this name in the order they appear on this chart. The category "Management Skills" would be placed at the bottom of the vertical axis in order to allow for identification of management skills needed for each position on the career path.

The diagram below illustrates the design of an unfilled In-Service Training Matrix.

The unfilled matrices are the mechanisms for obtaining and directing the participants' involvement in identifying the specific training that should be included in the final product. The Principal Investigator would have the participants work as a group to fill each matrix with appropriate training topics. The topics selected by the participants for the various "cells" of each matrix would constitute the training needed for each position on the career path of every department or activity in the organization. The lists of possible management development topics for three levels of management developed during Phase 1 of this project (see Appendix C) would be used to assist the participants with selecting the necessary management training topics for each position in the agency. As in the case of the Master Career Path Chart, an In-Service Training Matrix would not be finished until the participants agreed it was correct.

Department or Activity	Career Path for that particular Department/Activity
Names of departments or activities on the Master Career Path Chart	
Management skills	
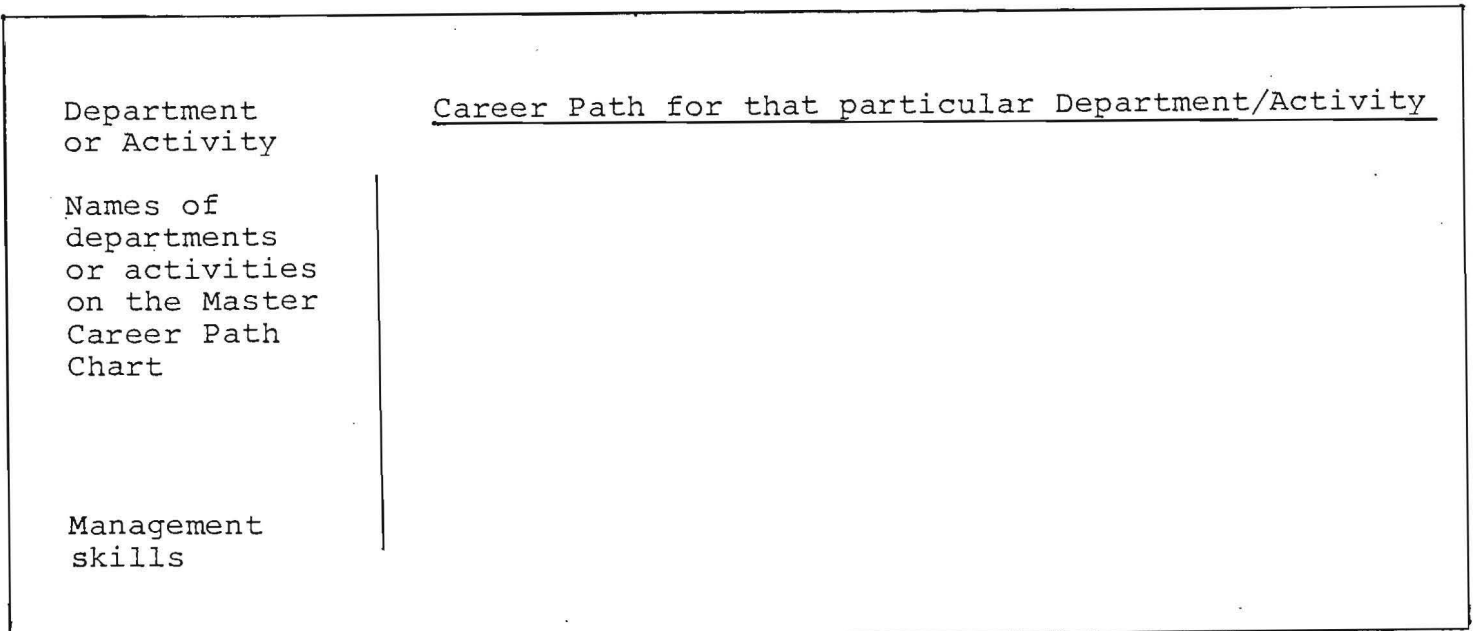
Completion of the In-Service Training Matrices would provide a training plan for a transit agency that identified all the training topics needed for each position in the organization. This final product connects training areas/topics to positions in the organization and takes into account the progression through positions and interrelationships among them. The Master Career Path Chart would help link the training for each area to the overall organization. The process used to develop this plan would enable the participating transit managers to be the creators of the final product.

Identification of the Product: Among the factors that determined what product would be produced by applying the training plan process to transit agencies was our experience with facilitating creation of the Portland Fire Bureau's comprehensive in-service training plan. It indicated that:

- Participants understood the design of the process for creating the plan soon after they began to work with the unfilled matrices; and

- While the time commitment needed from participants to complete a training plan using this process was much less than the traditional process (i.e., doing it via a committee), it might still be a significant deterrent to obtaining the participation of various transit agencies in this project.

This experience suggested that a complete training plan might not be the optimal product. It led to the selection of a product for this project that would contain the following components:

- A finished Master Career Path Chart;

- An unfilled matrix for each department or activity on the Master Career Path Chart; and

- An identification of the management training topics needed for each position in the agency.

This final product would avoid a burdensome time commitment from participating transit managers. Its completion would require an estimated maximum of twelve hours of group work. Creation of this product would furnish a sufficient basis for testing the applicability and utility of the training plan process for transit agencies. The specification of management training topics that it would contain would fill a gap identified by our initial survey of this region's transit managers (i.e., few training plans covered management). Hence, it would be something that participating transit agencies could use. Finally, the product, accompanied by some instructions from the

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Principal Investigator, would enable the participating transit managers to understand the process so that they could finish, implement, and manage a comprehensive training plan.

V. PHASE 2: APPLICATION OF THE TRAINING PLAN PROCESS TO TRANSIT AGENCIES

A. Description and Overview

Phase 2 involved the application of the training plan process developed in Phase 1 to help initiate the creation of comprehensive training plans by managers in selected training agencies. Figure 1 displays the components of Phase 2. This section of the report discusses these components and presents the results they produced.

B. Methodology

Obtain the Participation of Appropriate Transit Agencies: Phase 2 began with the task of identifying and obtaining the participation of appropriate transit agencies from this region in our project. Two key variables that became criteria for identifying appropriate transit agencies were the size of the transit agency operation and its geographical location. We wanted our selected transit agencies to be representative of the range in size of operation among this region's transit agencies. We also wanted our sample to reflect the various geographical areas in this region (i.e., avoid having all the participating agencies from the same state). The candidate agencies identified through the use of these criteria would be contacted in order to discern their interest and willingness to participate in the project (the final selection criterion).

Application of the Training Plan Process to Participating Transit Agencies: Selection of appropriate transit agencies to participate in this project would be followed by application of the process developed during Phase 1 to each selected agency. This application would consist of the Principal Investigator meeting with transit managers at their agencies in order to help them move through the following three steps:

- Creation of a finished Master Career Path Chart;

- Development of an unfilled matrix for each department or activity that appears on the Master Career Path Chart; and

- Identification of the management training topics needed for each position in the transit agency.

This process would provide the participating transit agency with a product created by some of its members and targeted to its own particular needs. It would enable the participants to overcome obstacles that often frustrate attempts to develop a training plan, such as "how to proceed" with the task. It would also

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facilitate the careful planning and management that is necessary for an effective comprehensive training program.

Explanation of the Process for Completing, Implementing, and Managing the Training Plan: At the conclusion of the application of the training plan process to each participating transit agency the Principal Investigator would review the following with the participants:

- How to finish the In-Service Training Matrices;

- How to implement the final product; and

- How to manage the plan.

This procedure would ensure that each participating transit agency would have the information it needs to complete and appropriately use its comprehensive training plan.

Check the Results: Application of the training plan process would produce two rough draft copies of the final product. One copy would be left at the transit agency. The Principal Investigator would use the other copy and the resources of the Portland State University Center for Transit Research and Management Development to create a second draft of the final product. Copies of this draft would be forwarded to the participants of the transit agency for review. A final draft of the product would incorporate any changes that needed to be made on the second draft. Copies of the final draft would then be forwarded to each participating agency.

C.   Results of Phase 2

Obtain the Participation of Appropriate Transit Agencies: We used the criteria of size of operation, geographical location, and interest in this project to select the following three transit agencies to participate in Phase 2:

- Rogue Valley Transportation District, Medford, Oregon: A small transit operation (less than fifty buses) located in southern Oregon.

- Salem Area Transit, Salem, Oregon: A medium sized transit operation (between fifty and 100 buses) located in northern Oregon.

- Seattle METRO, Seattle, Washington: The largest transit operation in this region.

Application of the Training Plan Process to Participating Transit Agencies: Application of the training plan process to each of the three selected transit agencies began with a review of the

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agency's organization chart by the Principal Investigator prior to the first meeting. This review helped familiarize him with each agency and provided a tool he could refer to in order to help the participants work on the Master Career Path Chart. In both the Rogue Valley Transportation District and Salem Area Transit application of the process followed the procedure developed during Phase 1 of this project. The process followed with Seattle METRO differed somewhat from this procedure. This difference is discussed in the review of the application of the process to Seattle METRO below.

Creation of the final product for the Rogue Valley Transportation District required a one-day meeting between the Principal Investigator and this agency's General Manager and Marketing Director (May 14, 1984). During the morning the Principal Investigator helped the participants develop their agency's Master Career Path Chart. Figure 2 is a copy of this agency's Master Career Path Chart. This chart enabled the Principal Investigator to create an unfilled matrix for each agency department (a total of four matrices). The participants used these unfilled matrices and the lists of possible management development topics for the three levels of management (see Appendix C) during the afternoon to identify the specific management training topics needed for each position in the agency. Figures 3 through 6 contain the matrices and the management training topics for the Rogue Valley Transportation District. A subsequent review of the second draft of these documents by the two participants indicated that the documents were accurate.

The meeting at the Rogue Valley Transportation District headquarters included information provided by the Principal Investigator regarding how the participants could use this product to complete, implement, and manage a comprehensive training plan. Completion of the plan would be accomplished when the participants had filled in the remaining spaces of all the matrices with appropriate training topics. Implementation of the plan would involve such activities as:

- An identification of the proper sequence and frequency for all training topics;

- A review of the adequacy of existing training programs for the proposed training topics;

- A prioritization of the training topics that are not now covered by existing training programs; and

- Using this prioritization, the development of appropriate programs for topics that are not now covered.

The participants received a copy of the "Topic Information Form" (Appendix D) to help them consider some of the factors mentioned above. Finally, the Master Career Path Chart and In-Service Training Matrices provided a basis for creating a master calendar and scheduling process for managing the plan. The graphic aspect of the chart and matrices would also facilitate making any eventual necessary changes in the plan.

Development of the final product for Salem Area Transit involved a one day meeting on June 4, 1984, and a subsequent half-day meeting on June 12, 1984. The Principal Investigator met both times with the agency's General Manager and three other managers at their central office. Creation of the agency's Master Career Path Chart occupied the first half of the initial meeting. This chart is represented by Figure 7. It yielded five unfilled matrices. The participants spent the remainder of the time working with these unfilled matrices and the lists of possible management development topics for the three levels of management (see Appendix C) in order to specify the management training topics needed for each position in this transit agency. Figures 8 through 12 contain the matrices and the management training topics for Salem Area Transit. A later review of the second draft of these documents by the four participants indicated that no changes in the second draft were necessary. The participating managers at Salem Area Transit received the same information and material as their Rogue Valley Transportation District counterparts regarding use of their product to complete, implement, and manage a comprehensive training plan.

The Principal Investigator made two visits to Seattle METRO headquarters for this project (May 11 and June 8, 1984). The first visit was spent with the Seattle METRO Manager of Safety and Training and its Supervisor of Training. This meeting included a review and discussion of the training plan process developed during Phase 1 and creation of a rough draft of a Master Career Path Chart for Seattle METRO. A few other managers at Seattle METRO participated briefly in developing this rough draft.

The second meeting included the Manager of Safety and Training and his secretary in addition to the Principal Investigator and focused on the following two areas:

- Creation of a finished Master Career Path Chart (Figure 13 depicts the final version of this chart); and

- Structuring a process to obtain input from Seattle METRO managers on specifying the management training topics needed for each position in this transit agency.

Rogue Valley Transportation District

Master Career Path Chart

Operations	Operator	Dispatcher	Operations Manager
Vehicle Maintenance	Equipment Service Worker / Mechanic	Maintenance Supervisor	Maintenance Manager
Marketing/ Planning	Planning Help / Marketing Help		Marketing Director
Administrative Services	Clerk		Administrative Services Supervisor
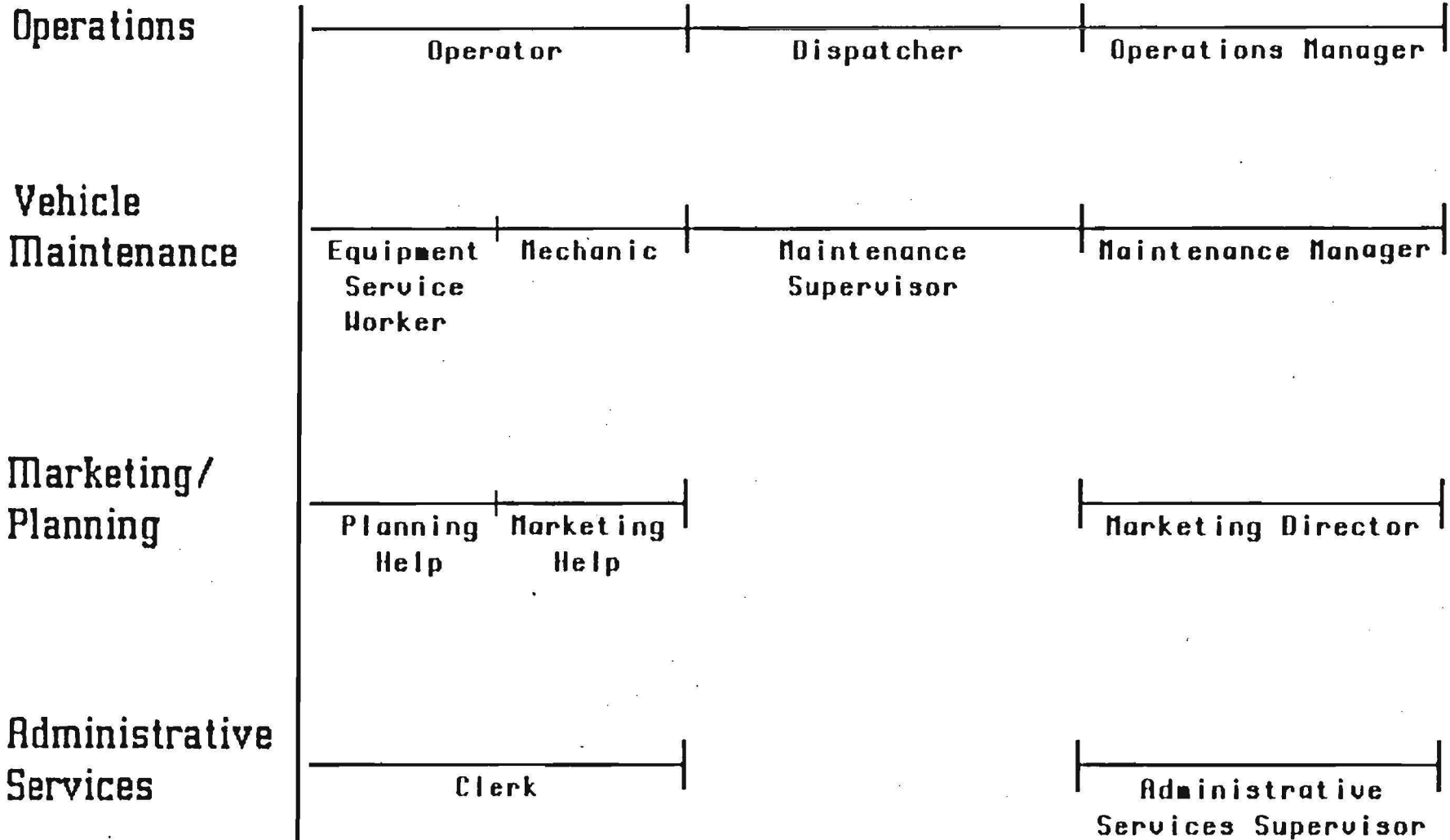
FIGURE 2

ROGUE VALLEY TRANSPORTATION DISTRICT
MASTER CAREER PATH CHART.

Rogue Valley Transportation District

Operations

Operator	Dispatcher	Operations Manager

Operations

Vehicle
Maintenance

Marketing/
Planning

Administrative
Services

Management
Skills

MANAGEMENT LEVEL 1

- Introduction to Supervision
- Human Relations
- Handling Grievances
- Personnel Evaluation
- Problem Solving
- Understanding & Managing Human Behavior
- Labor Relations
- Absenteeism
- Training for Subordinates
- Policy Enforcement

MANAGEMENT LEVEL 1

MANAGEMENT LEVEL 2

- Computer Skills
- Scheduling
- Effective Meetings
- Goal Setting
- Time Management
- Administering Labor Contract
- Security
- Budgeting
- Job Design
- Discipline
- Stress Management
- Dealing with Strikes
- Affirmative Action

- Performance Standards and Evaluation
- Styles of Management
- Organizing and Implementing
- Policy Implementation
- Work Planning and Control, including PERT
- Communications, including Memos and Reports
- Training Plan Development
- Delegation and Control
- Analytical Skills, including Data Collection and Use

- Bus Accident Investigation

FIGURE 3

ROGUE VALLEY TRANSPORTATION DISTRICT
OPERATIONS MANAGEMENT SKILLS

Vehicle Maintenance

Operations

Vehicle Maintenance

Marketing/ Planning

Administrative Services

Management Skills

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Equipment Service Worker	Mechanic	Maintenance Supervisor	Maintenance Manager

MANAGEMENT LEVEL 1

• Work Planning and Control
• Time Management

MANAGEMENT LEVEL 1
MANAGEMENT LEVEL 2

• Productivity

FIGURE 4

ROGUE VALLEY TRANSPORTATION DISTRICT
VEHICLE MAINTENANCE MANAGEMENT SKILLS

Rogue Valley Transportation District

Marketing/Planning

Operations

Vehicle
Maintenance

Marketing/
Planning

Administrative
Services

Management
Skills

Planning Help	Marketing Help	Marketing Director
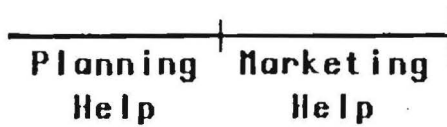
MANAGEMENT LEVEL 1
MANAGEMENT LEVEL 2

- Productivity
- Management Information Systems
- Use of Consultants and Contractors
- Dealing with the Media
- Marketing
- Working with Government Agencies
- Long and Short-Range Planning

- Presentation Techniques
- Network Analysis and Flow Charts
- Computers and Organization
- Transit Fares and Pricing
- Forecasting
- Community Relations and Support

FIGURE 5

ROGUE VALLEY TRANSPORTATION DISTRICT
MARKETING/PLANNING MANAGEMENT SKILLS

Rogue Valley Transportation District

Administrative Services

Operations

Vehicle
Maintenance

Marketing/
Planning

Administrative
Services

Management
Skills

Clerk

Administrative
Services Supervisor

MANAGEMENT LEVEL 1
MANAGEMENT LEVEL 2

- Financial Management
  and Budgeting
- Personal Finances and
  Retirement
- Productivity
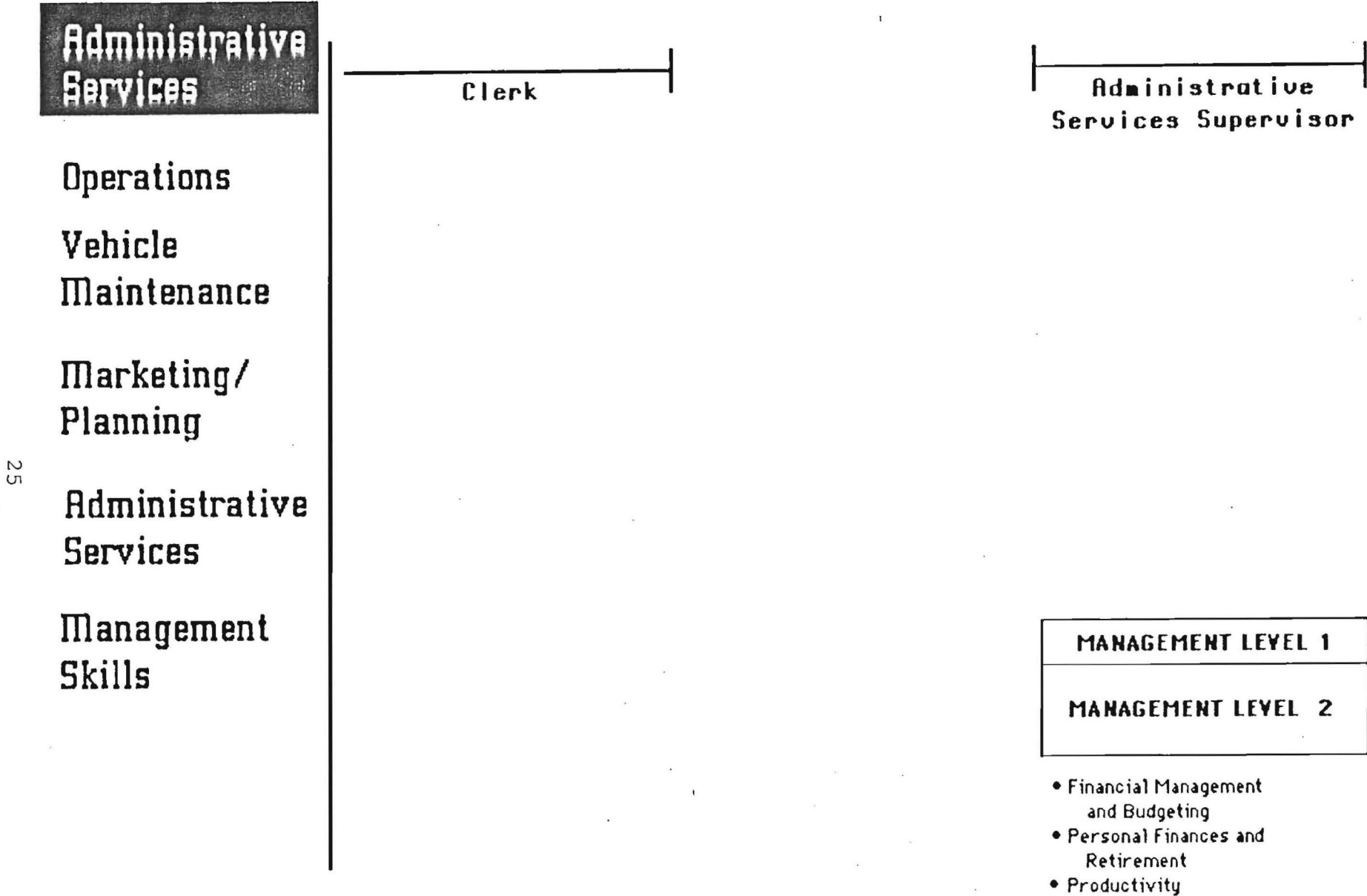
FIGURE 6

ROGUE VALLEY TRANSPORTATION DISTRICT
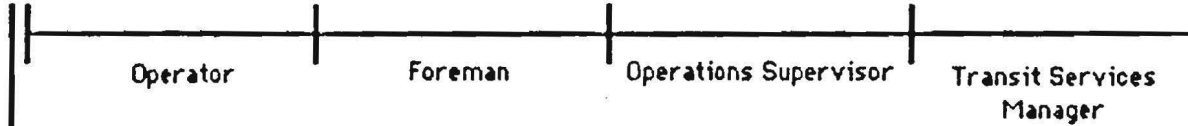ADMINISTRATIVE SERVICES MANAGEMENT SKILLS

The second area reflected a decision by the Seattle METRO Manager of Safety and Training to acquire this input. This variation on the training plan process developed during Phase 1 involved use of the Master Career Path Chart and the lists of possible management development topics for three levels of management (see Appendix C) to construct a questionnaire that would ask the respondent to indicate which management topics are necessary for each position in Seattle METRO. Our meeting considered how to complete this task, including design issues of this questionnaire. The plan called for the Safety and Training Division to develop this questionnaire and disseminate it to Seattle METRO managers. The results will be incorporated into the "Management Skills" category of the various unfilled matrices that derive from the Seattle METRO Master Career Path Chart. This variation on the training plan process reflects its ability to facilitate a highly participative process for developing a training plan.

The results of the final two components of Phase 2 (explanation of the process for completing, implementing and managing the training plan and the check for results) for both the Rogue Valley Transportation District and Salem Area Transit have already been discussed. These concerns were also covered with the participants from Seattle METRO. However, the check for results here only covered the Master Career Path Chart, since Seattle METRO has not yet completed its specification of management development topics. Seattle METRO officials regard completion of this job as a long-term task, which exceeds the time commitment for completion of our project.

A few months after the series of meetings with the participating transit agencies, the Principal Investigator contacted the General Managers of each agency to find out their views on the utility of the training plan process and the use they had made of the final product it had helped produce. All three indicated that the process is highly useful for identifying and sequencing training needs. Each manager has also used the final product. For instance, Sherman Flogstad, Gneral Manger of the Rogue Valley Transportation District, finds it particularly helpful for training new staff. Seattle METRO has used its final product to help it conduct a training needs assessment for the position of Lead Mechanic. It is using the experience as the basis for implementing a training needs assessment for all its first level supervision positions.

Salem Area Transit
Master Career Path Chart
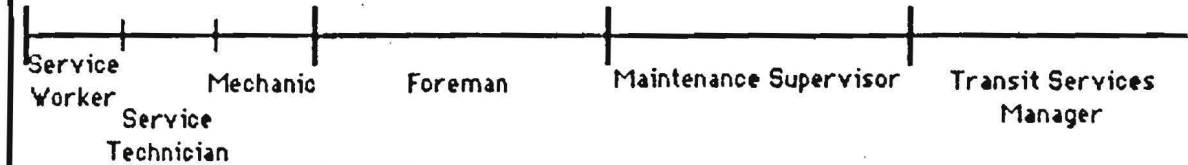
Operations

| Operator | Foreman | Operations Supervisor | Transit Services Manager |

Maintenance

Service Worker Service Technician Mechanic | Foreman | Maintenance Supervisor | Transit Services Manager

Planning / Marketing

Information Specialist | Manager

Finance & Administration

Secretary; Accounting Clerk; Stores Clerk | Supplies and Services Specialist | Business Manager

General Administration

Secretary Staff Assistant | Personnel Officer | General Manager

FIGURE 7

SALEM AREA TRANSIT
MASTER CAREER PATH CHART

Salem Area Transit

Operator	Foreman	Operations Supervisor	Transit Services Manager

Operations

Operations
Maintenance
Planning / Marketing
Finance & Administration
General Administration
Management Skills

Management Level 1

- Administering the labor contract
- Employee selection
- Training for subordinates
- Work scheduling, assignment and monitoring
- Performance standards and evaluation
- Employee discipline
- Legal responsibilities of the supervisor
- Communication
- Human relations
- Problem investigation and analysis
- Safety administration
- Productivity

- Customer and public relations
- Security

Management Level 1

Management Level 2

- Budget administration
- Delegation and control
- Conducting effective meetings
- Leadership skills
- Management uses of the computer
- Labor relations
- Project planning and implementation

- Customer and public relations
- Security

Management Level 1
Management Level 2

Management Level 3

- Budget formulation, control and administration
- Risk management
- Labor relations: Legal framework, including 13c
- Labor relations: Contract administration and negotiations
- Management skills and effectiveness
- Use of consultants and contractors
- UMTA regulations and requirements
- Public administration
- Media and press relations
- Human resources development
- Community relations
- Security

- Customer and public relations
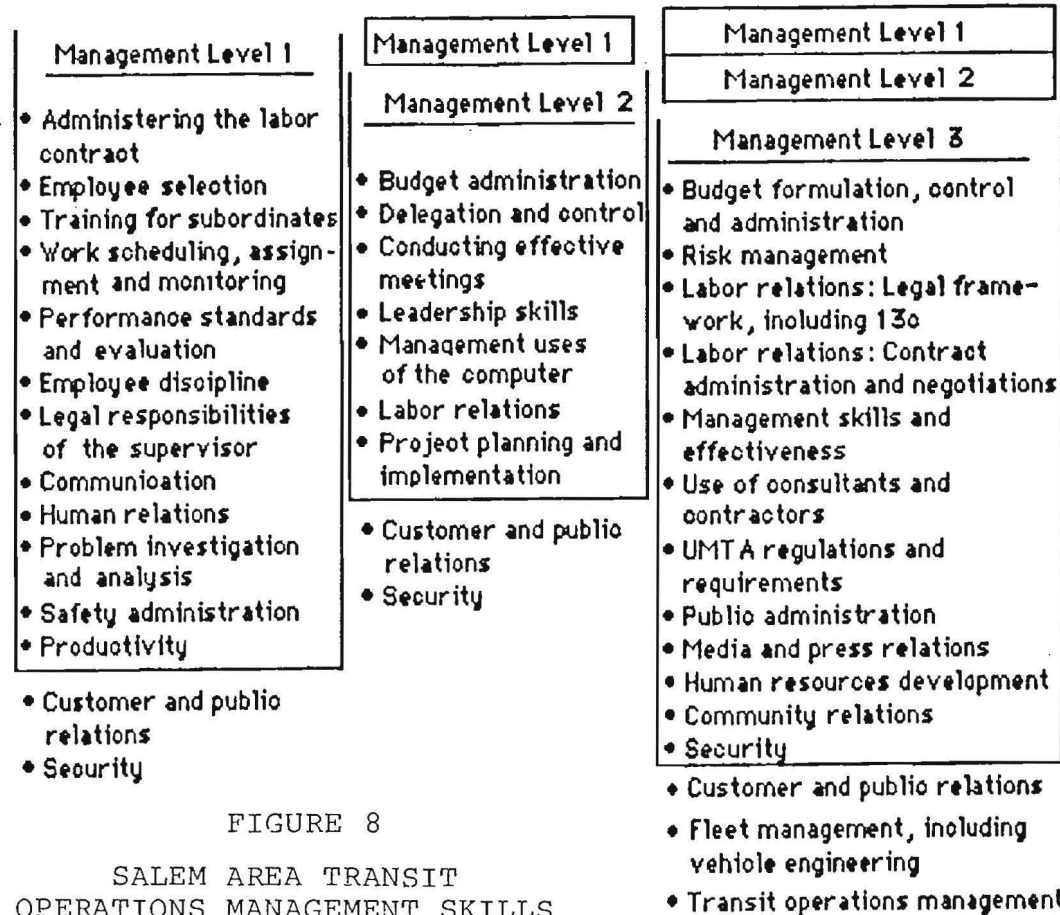- Fleet management, including vehicle engineering
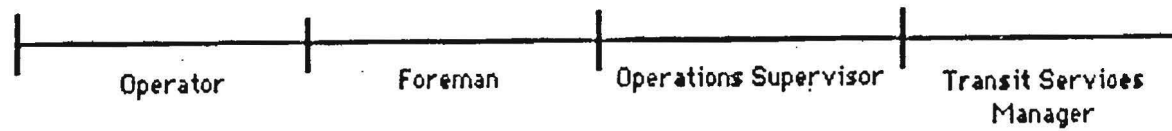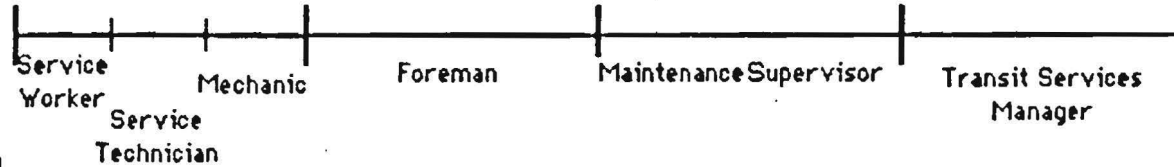- Transit operations management

FIGURE 8

SALEM AREA TRANSIT
OPERATIONS MANAGEMENT SKILLS

Salem Area Transit

Maintenance

Operations

Maintenance

Planning /
Marketing

Finance &
Administration

General
Administration

Management
Skills

Service Worker	Service Technician	Mechanic	Foreman	Maintenance Supervisor	Transit Services Manager

Management Level 1	Management Level 1	Management Level 1
	Management Level 2	Management Level 2
		Management Level 3

- Customer and public relations
- Fleet management, including vehicle engineering
- Transit operations management

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FIGURE 9

SALEM AREA TRANSIT

MAINTENANCE MANAGEMENT SKILLS

Salem Area Transit

Information Specialist

Manager

Operations

Maintenance

**Planning /
Marketing**

**Finance &
Administration**

**General
Administration**

**Management
Skills**

| Management Level 1 |
| Management Level 2 |
| Management Level 3 |

- Transit fares and pricing
- Service and route planning
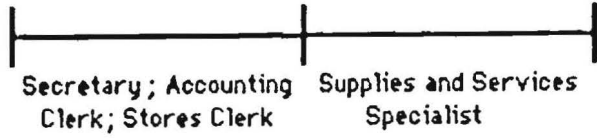- Effective marketing

30

FIGURE 10

SALEM AREA TRANSIT

PLANNING/MARKETING MANAGEMENT SKILLS

Finance & Administration

Operations

Maintenance

Planning /
Marketing

Finance &
Administration

General
Administration

Management
Skills

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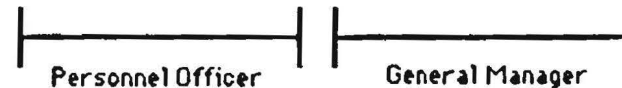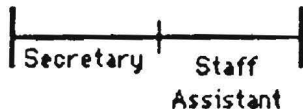| Secretary; Accounting Clerk; Stores Clerk | Supplies and Services Specialist | | Business Manager |

| Management Level 1 |

| Management Level 1 |
| Management Level 2 |
| Management Level 3 |

- Accounting and financial records management
- Procurement and materials management
- Management information systems
- Employee benefits planning
- Labor negotiations planning

FIGURE 11

SALEM AREA TRANSIT
FINANCE AND ADMINISTRATION MANAGEMENT SKILLS

General Administration

| Secretary | Staff Assistant | | Personnel Officer | General Manager |

Operations

Maintenance

Planning /
Marketing

Finance &
Administration

General
Administration

Management
Skills

Management Level 1	Management Level 1
Management Level 2	Management Level 2
Management Level 3	Management Level 3

- Employee benefits management
- Personnel systems management
- Personnel policy development and implementation
- Labor law
- Labor negotiations planning

Management Level 4

- Financial management
- Strategic planning
- Decision making
- Transit Board relations and effectiveness
- General administration
- Managing change

FIGURE 12

SALEM AREA TRANSIT
GENERAL ADMINISTRATION MANAGEMENT SKILLS

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Master Career Path Chart

Base Operations

| Operator | Dispatcher | | Chief | Base Supervisor |

Service Control

Schedule Maker — Service Supervisor — Senior Schedule Maker — Chief — Supervisor of
Coordinator

Vehicle Maintenance

Equipment Service Worker — Mechanic — Lead (Equipment Services; Mechanic) — Chief — Supervisor of

Power

Unskilled — Trades — Crew Chief — Chief of — Supervisor of

Facilities

Unskilled — Trades — Crew Chief — Chief of — Supervisor of

Safety

Officer — Chief — Supervisor of

Training

Maintenance Trainer — Senior Operations Trainer — Chief — Supervisor of
Operations Instructor

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FIGURE 13
SEATTLE METRO
OPERATIONS MASTER CAREER PATH CHART

VI. PHASE 3: DISSEMINATION OF INFORMATION ON THE PROCESS TO THE TRANSIT INDUSTRY

A. Description and Overview

Phase 3 centered on the selection and use of the most feasible and effective communication modes to inform managers in other transit agencies about the training plan process developed and applied in this project. Figure 1 contains Phase 3 components. A consideration of these components and the results they produced follows.

B. Methodology

Determination of the Most Feasible and Effective Modes: Dissemination of information on this process and its use with selected transit agencies reflects an effort by the Portland State University Center for Transit Research and Management Development to make this technology available to the transit industry. Hence, the first step taken during Phase 3 would involve an investigation of various means of communicating this technology to transit managers in order to identify the most feasible and effective ones.

This investigation would begin with an identification of the possible communicating modes. An effort to gather data in order to assess the identified communicating modes on the basis of the following criteria would be the next step:

- The ability of the communicating mode to effectively convey the process to transit managers so that they can understand and use the approach;

- The cost incurred by the Portland State University Center for Transit Research and Management Development to use the communicating mode; and

- Transit agency access to the communicating mode (i.e., whether cost considerations and/or access to appropriate equipment limit access).

Among the devices used to gather this data would be the questionnaire sent to this region's transit managers during Phase 1 (for possible use of a videotape), informal talks with various transit managers contacted during this project, and observation of the use of communicating modes within the transit industry. The data provided by this investigation would help decide which communicating mode(s) to use.

Preparation, Testing, and Use of Selected Mode(s): The final component of Phase 3 would consist of preparing, testing, and

using the communication mode(s) found to be feasible and effective. Completion of this component would include the following for each selected communication mode:

- Preparation of an initial draft package.

- Review and testing of the initial draft package. Where possible, transit managers would be included among the reviewers.

- Completion of the final draft package. During this step any needed changes identified by the review would be made in the initial draft package.

- Use of the final draft package by the Portland State University Center for Transit Research and Management Development.

This procedure would promote the effective development of the communication mode(s) selected to disseminate information to the transit industry on the training plan process developed during this project and its applicability to transit agencies.

C. Results

Determination of the Most Feasible and Effective Modes: Our investigation of various methods of communicating the training plan process to the transit industry included a consideration of the following communication modes:

- Videotape;

- Workshop/conference;

- Use of this final report by the Urban Mass Transportation Administration as a Technical Report that would be widely distributed throughout this field; and

- Publication of an article that describes the training plan process and its applicability to transit agencies in a recognized transit-related journal.

The data this investigation generated indicated that:

- The production and use of a videotape did not appear to be cost-effective; and

- None of the communicating modes reviewed was the optimal method for disseminating information.

Our initial interest in the possible production and use of a videotape to disseminate information on this project led us to

obtain an estimate on the cost of professional services related to its production and to use the questionnaire survey of this region's transit agencies to discern their access to a videotape. The "conservative" estimate on the cost of professional services was $6,484 (Appendix E contains a copy of this estimate). The results of the survey showed that less than one-third of the transit agencies that responded (eight out of twenty-five) had access to a videotape player (Appendix B contains a copy of this questionnaire). This degree of access to this region's transit agencies did not seem to warrant the cost of producing a videotape.

The other communication modes we reviewed had limitations. For instance, the access of transit managers to a workshop on the training plan process would be limited by such considerations as geography, timing, and the travel budget; we would have little control over whether the final report would become an UMTA Technical Report; and the transit journal's readers would determine which transit managers would see the article on the training plan process. However, each of these three modes offered a potentially effective and economical means of disseminating information to a segment of the transit industry. The Technical Report and the article would reach many transit managers throughout the United States who could not attend the workshop. These factors convinced us to use all of the communicating modes, except the videotape.

Preparation, Testing, and Use of the Selected Modes: The workshop was the first communicating mode used to disseminate information on the training plan process. It was developed as a one-day session with the goal of having the participants understand the training plan process and its application so that they could use it to develop a training plan for their agencies. Preparation and testing for this workshop included the following steps:

- Creation of an initial design and agenda for the workshop;

- Review of the initial design and agenda by staff of the Portland State University Center for Transit Research and Management Development;

- Development of the workshop's final design and agenda;

- Making arrangements for the workshop with the aid of the Oregon and Washington State Departments of Transportation; and

- Notifying transit managers throughout a large segment of this industry about the workshop (Appendix F contains a copy of the notice developed for this purpose).

The workshop was held in a conference room at the Washington State Department of Transportation headquarters in Olympia, Washington, on June 18, 1984. The Principal Investigator first explained the design of the training plan process and its application to the four attending transit managers. Next came a review by the Principal Investigator of the results of the application of the training plan process to the three participating transit agencies. The final phase of the workshop involved the Principal Investigator helping the attending transit managers develop an initial Master Career Path Chart for their agencies and consider using this chart to specify training topics for management positions. A check with the participants at the end of the session indicated that the workshop had achieved its goal. At least one of the participants, Mr. William P. Bernier of Monterey-Salinas Transit (California), has subsequently used the information presented in this workshop to help develop a training plan for his agency (see Appendix G for a copy of Mr. Bernier's letter).

Completion of this Final Report represents a major element of the preparation of a second communicating mode. It could be distributed by the Urban Mass Transportation Administration as a Technical Report to transit managers throughout the United States. We have forwarded copies of an initial draft of this report to several transit managers, including those who participated in Phase 2 of this project, for their comments on its ability to communicate the training plan process and its applicability to other transit managers. The changes identified by this review have been incorporated into this Final Report. However, the decision to disseminate this document as a Technical Report rests with the Urban Mass Transportation Administration.

An article that succinctly describes our training plan process, its application to the three transit agencies, and the utility of this approach for other transit agencies has been prepared. Like the Final Report, copies of an initial draft of the article were sent to some transit managers for their assessment of its ability to communicate the training plan process and its applicability to other transit managers. The final draft of the article includes necessary changes identified by this review. It was forwarded to the editor of a noted transit-related journal for possible inclusion in one of its future issues. We hope for a 1985 publication date for this article. It could then be used on a continuing basis by the Portland State University Center for Transit Research and Management Development to communicate with transit managers about the training plan process and its applicability to their agencies.

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VII. CONCLUSION

A. Description and Overview

The final section of this report contains conclusions on the following two issues:

- The utility of the training plan process for transit agencies; and

- The relationship of this project to the mission of the Portland State University Center for Transit Research and Management Development.

B. The Utility of the Training Plan Process

The results of this project indicate that the training plan development process possesses the following important properties:

- High applicability to transit agencies throughout the United States. There were no significant problems in using this process at any of the three sites. This tool proved to be flexible and adaptable. It worked well regardless of the size of the agency operation or the type of organization (e.g., a free standing organization vs. a transit operation within a large agency). In addition, no special factors were present in the three selected transit agencies that would facilitate use of the training plan process there more so than at other transit agencies.

- Ability to facilitate a participative approach toward plan creation. It enables transit managers to create their plan (rather than have one developed by a consultant). The Seattle METRO example shows it can be used to foster widespread participation in the process. Such involvement increases the commitment of the participants to training as well as to the final product. This outcome helps implementation and management of the plan.

- High congruence with the needs and working environment of many transit managers. It fits the typical work setting of many transit managers (e.g., hectic, varied, and fragmented) by requiring considerably less time than the traditional method (committee report) to create the plan. The tool is both inexpensive and effective. The facilitator and the participants' time are the only cost items. It makes the process of plan creation more manageable. The use of graphics and breaking the

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process into specific, clearly defined, and feasible steps gives the participants a clear agenda and specific details to address.

- Ability to produce a training plan that appropriately targets training resources by:

  - including the training needs of all positions in every department/activity of the agency;

  - developing a progression of training topics to match the progression of positions in the career path of each department or activity of the agency.

  - clarifying the similar and different training needs of various positions in the same department/activity (e.g., Operator and Dispatcher) and of the same level of position in different functional areas (e.g., first level supervisor in Operations and first level supervisor in Maintenance);

  - identifying training needs in departments/ activities that derive from the interdependence between them (e.g., what Operators need to know about Maintenance);

  - linking training topics to the organization and the overall training effort; and

  - providing the plan in a form that is understood quickly by everyone and readily implemented, managed and (when necessary) changed.

These properties make the training plan process a highly useful tool for transit agencies.

C.   This Project and the Mission of the Portland State University Center for Transit Research and Management Development

This project directly relates to a core component of the mission of the Portland State University Center for Transit Research and Management Development: The provision of training and management development opportunities to transit managers. Creation and dissemination of a process for developing comprehensive training plans provides transit managers with a useful tool for maximizing their training resources. The identification of the specific training needs of their agencies enable transit managers to relate those needs to the training resources of the Portland State University Center for Transit Research and Management

Development.   Hence, the training plan process developed by this project enhances the ability of the Portland State University's Transit Center to respond to the specific training and management development needs of transit agencies.

List of this Region's Transit Agencies

IDAHO

1. Boise Urban Stages
   P.O. Box 9016
   Boise 83707
   208-336-1019
   G.M.: Len Engel
   Training: Don Manhalder

2. Panhandle Area Transit
   1844 N. Government Way
   Coeur d' Alene 83814
   208-664-9769
   G.M.: C. Richard Hinrichs
   Training: same

3. Community and Rural Trans-
       portation, Inc. (CART)
   P.O. Box 1253
   Idaho Falls 83401
   208-524-0090
   G.M.: Herb Norr
   Training: ---

4. Ketchum Area Rapid Transit
       (KART)
   P.O. Box 567
   Ketchum 83340
   208-726-7140
   G.M.: Bill O'Neal
   Training: ---

5. Pocatello Urban Transit
   City of Pocatello, Transit
       Division
   902 E. Sherman
   Pocatello 83201
   208-232-0111
   G.M.: Ron Binggeli
   Training: Dave Hunt

6. Southeast Idaho Transportation
       (SIT)
   Southeast Idaho Council of Gov-
       ernments
   224 S. Arthur
   Pocatello 83201
   208-232-7275
   G.M.: Allan Lesser
   Training: ---

7. TRANS IV
   College of Southern Idaho
   P.O. Box 1238
   Twin Falls 83301
   208-734-9950
   G.M.: Charles Chambers
   Training: Doug Eslinger

1. Albany Transit System
   127 Broadalbin St. S.W.
   Albany 97321
   503-967-4371
   G.M.: Mike Corso
   Training: Debbie Fank

2. TBR Company
   1095 Duane St.
   Astoria 97103
   503-325-3521
   G.M.: Trygve Duoss
   Training: same

3. Bend Dial-a-Ride
   1036 N.E. 5th.
   Bend 97701
   503-389-7433
   G.M.: Joyce Embrie
   Training: Gary Davis

4. Curry County Public Transit
   P.O. Box 1444
   Brookings 97415
   503-469-6822
   G.M.: Elmer Hitchcock
   Training: ---

5. Corvallis Transit Authority
   P.O. Box 1083
   Corvallis 97339
   503-757-6941
   G.M.: Brian Fodness
   Training: ---

6. Lane Transit District
   P.O. Box 2710
   Eugene 97402
   503-687-5555
   G.M.: Phyllis Loobey
   Training: Gary Deverell

7. Basin Transit Service
   127 S. 11th. St.
   Klamath Falls 97601
   503-884-6287
   G.M.: Jerry Ehlers
   Training: Jerry Brazille

8. Rogue Valley Transportation District
   3200 Crater Lake Ave.
   Medford 97501
   503-779-2877
   G.M.: Sherman Flogstad
   Training: Roland Fowlkes

9. Newport Area Transit System
   Urban Renewal Center, Room 5
   169 S.W. Coast Hwy.
   Newport 97365
   503-265-7783
   G.M.: Bill Youngreen
   Training: same

10. Tri-County Metropolitan Transit District
    of Oregon (Tri-Met)
    4012 S.E. 17th. Ave.
    Portland 97202
    503-238-4918
    G.M.: James Cowen
    Training: Lyle Lafollette

11. Pumpqua Pumpkin Ride
    900 S.E. Douglas Ave.
    Roseburg 97470
    503-672-7701
    G.M.: Pete Donahue
    Training: Debra Mobley

12. Salem Area Mass Transit District
    216 High St. N.E.
    Salem 97301
    503-588-6005
    G.M.: Gordon Aoyagi
    Training: same

13. Woodburn Transit System
    270 Montgomery St.
    Woodburn 97071
    503-981-7111 ext. 66
    G.M.: Steve Fosdick
    Training: same

1. Bellingham City Transit
2200 Nevada St.
Bellingham 98226
206-676-6843
G.M.: Edward Griemsmann
Training: Richard Walsh

2. Bremerton Municipal Transit
234 S. Wycoff Ave.
Bremerton 98312
206-377-3945
G.M.: Jim Mentor
Training: George Murken

3. Twin Transit
534 N. Market Blvd.
Chehalis 98532
206-748-4873
G.M.: James Carroll
Training: same

4. Everett Transit System
3200 Cedar Ave.
Everett 98201
206-259-8898
G.M.: Mary Riordan
Training: committee

5. Grays Harbor Transportation
   Authority
3000 Bay Ave.
Hoquiam 98550
206-532-2770
G.M.: David Rostedt
Training: Doug Ross

6. Community Transit
4208 198th. St. Suite 201
Lynnwood 98036
206-776-7609
G.M.: Vic Sood
Training: Mike Wines

7. Community Urban Bus Service
P.O. Box 128
Longview 98632
206-577-3399
G.M.: J. Walter Barham
Training: Jim Verhei

8. Intercity Transit
P.O. Box 659
Olympia 98507
206-753-8107
G.M.: James Slakey
Training: Dan Snow

9. Clallam Transportation System
2417 W. 19th.
Port Angeles 98362
206-452-4511
G.M.: William MacCully
Training: Paul Nagner

10. Kitsap Transit
614 Division
Port Orchard 98366
206-876-6026
G.M.: Richard Hayes
Training: Bud Cole

11. Jefferson Transit Authority
P.O. Box 908
Port Townsend 98368
206-385-4779
G.M.: Peter Badame
Training: Steve Iden

12. Prosser Rural Transportation Program
1109 Meade Ave.
Prosser 99350
509-786-1707
G.M.: Helen Davis
Training: same

13. Pullman Transit
Rt. 1 Box 540
Pullman 99163
509-332-6535
G.M.: Rod Torthornton
Training: same

14. Pacific Transit System
212 N. 2nd. St.
Raymond 98577
206-875-6541 ext. 450
G.M.: Daniel DiGuilio
Training: Dick Reiners

15. Seattle Metro
    821 2nd. Ave.
    Seattle 98104
    206-447-6561
    G.M.: Ronald Tober
    Training: Monte Lish

16. Spokane Transit (START)
    North 9 Post St. Suite 300
    Spokane 99201
    509-458-2570
    G.M.: Jerry Haight
    Training: Samuel Garris

17. Pierce Transit
    P.O. Box 5738
    Tacoma 98405
    206-593-4525
    G.M.: Donald Monroe
    Training: Louie Lemoine

18. Ben Franklin Transit
    P.O. Box 2447
    Tri Cities 99302
    509-545-5048
    G.M.: John Olson
    Training: Robert Knight


19. C-Tran
    1104 Main St.
    Vancouver 98660
    206-696-4494
    G.M.: Les White
    Training: Mark Wells

20. Valley Transit
    8 West Poplar
    Walla Walla 99362
    509-525-9140
    G.M.: Jim Zier
    Training: Ron Wallace

21. Yakima Transit
    2301 Fruitvale Blvd.
    Yakima 98902
    509-575-6175
    G.M.: Bill Schultz
    Training: Ken Kohagen

Packet Containing Information
on the PSU Transit Center and
the Data Base Questionnaire

PSU
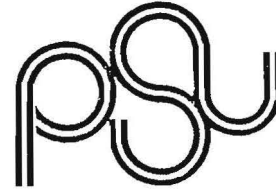
PORTLAND
STATE
UNIVERSITY
p.o. box 751
portland. oregon
97207
503·229-4042

School of
Urban and
Public Affairs

center for
urban studies

center for
transit research
and management
development

September 1, 1983

The Portland State University Transit Research and Management
Development Center is now up and running, and we want to take
this opportunity to formally introduce ourselves to you. The
Center is one of eight funded by the Urban Mass Transportation
Administration's University Research and Training Program in
order to enhance the University's role as a research and
training resource for the transit industry. Our Center's
focus is on transit operations in Idaho, Oregon, and Washington.

Given the economic realities of the 80's our Center does not
have a large amount of money to work with, but we plan to use
what we do have wisely in order to provide services that are
useful to the transit operations in our region. Our activities
are twofold: 1) research in key areas of the transit industry
that will lead to useful information for transit organizations;
and 2) management development activities (including development
of approaches to employee training), training activities
sponsored by the Center, and technical assistance.

In the short time the Center has been in existence we have
sponsored or co-sponsored the following training and management
development workshops:

- Labor Relations in the Transit Industry

- Administrative Planning for Service Innovations in
  the Transit Industry

- Urban Transportation: A Private/Public Venture

- Time Transfer: A Conference and Management Training
  Course (coming in October)

We plan to continue sponsoring or co-sponsoring such activities in order to disseminate useful information within our region.

To help us serve you better, please take a few minutes to review and respond to the enclosed questionnaire. We have provided a stamped addressed envelope to make it easy to return it to us. Thank you for your help. (Also enclosed is a copy of our mailing list. We hope you find it useful.)

If there is a way that we might be of direct assistance to your operation, please give us a call or drop us a note and we will do our best to respond effectively. Our Center was created to serve you and we welcome the opportunity to do so.

Sincerely,

Kenneth J. Dueker
Co-Director
Center for Transit Research
  and Management Development

KJD:dp

enclosures

QUESTIONNAIRE

Name of Operation:_____

Name of person completing questionnaire:_____

1. Did we make any mistakes in the information about your organization on the mailing list?

   ____no ____yes, please correct: _____

2. We'd like to know the size of your operation, in two ways:

   number of buses_____   number of employees_____

3. What unions, if any, does your operation have contracts with?

   _____

   _____

   _____

4. What trade or professional organizations, if any, does your organization belong to?

   _____

   _____

   _____

5. What publications, if any, does your organization subscribe to?

   _____

   _____

   _____

6. We're interested in the potential use of videotapes to disseminate information. Does your operation have a videotape player?

   ____no ____yes, type: _____

7. Has your organization done a training need assessment?

   ____no ____yes, covering these kinds of employees: _____

8. Does your operation have a training plan for its employees?

   ____no ____yes, covering these kinds of employees: _____

9. One of the roles of our Center is to link up transit organizations in our region that can learn from one another, so: What facet of transit operation do you feel your organization does best?

   _____

10. We'd also like to identify problems facing transit operations in our region, so: What facet of transit operation do you feel your organization has the most problems with?

   _____

List of Possible Management Development
Topics for each of the following:

1) First Line Supervisors
2) Middle Managers
3) Top Managers/Executives

MANAGEMENT DEVELOPMENT TOPICS FOR SUPERVISORS

1. Orientation and Introduction to Supervision
2. Positive Discipline
3. Communication--including memos, reports, and giving directions
4. Human Relations
5. Handling Grievances
6. Computers
7. Bus Accident Investigation
8. Personnel Evaluation
9. Training for Subordinates
10. Motivation
11. Productivity
12. Job Design and Re-Design
13. Delegation and Control
14. Problem Solving Skills
15. Stress Management
16. Time Management
17. Managing Conflict
18. Understanding and Managing Human Behavior
19. Labor Relations
20. Planning
21. Absenteeism
22. Continuing Employee Problems
23. Performance Standards and Evaluation
24. Effective Meetings
25. Team Building and Management
26. The Supervisor as a Leader
27. Personal Finances/Retirement
28. Work Planning and Control-- including PERT
29. Coaching and Counseling
30. Goal Setting
31. Assertiveness for Supervisors
32. Decision-Making
33. Effective Meetings
34. Analytical Skills for Supervisors--including data collection and use; Quality Circles
35. Administering the Labor Contract
36. Legal Responsibilities of the Supervisor
37. Affirmative Action
38. How to Conduct on-the-Job Training
39. Dealing with Strikes

MANAGEMENT DEVELOPMENT TOPICS FOR <u>MIDDLE MANAGERS</u>

1. Orientation and Introduction to Middle Management

2. Absenteeism

3. Scheduling

4. Presentation Techniques

5. Computers

6. Labor Relations

7. Security

8. Budgeting

9. Marketing

10. Personnel Evaluation

11. Training for Subordinates

12. Productivity

13. Job Design

14. Delegation and Control

15. Problem Solving Skills and Decision Making

16. Contract Negotiation and Management

17. Communication---including memos and reports

18. Stress Management

19. Time Management

20. Understanding and Managing Human Behavior

21. Planning

22. Project Management

23. Performance Standards and Evaluation

24. Team Building and Management

25. Personal Finances and Retirement

26. Motivation

27. Organizing and Implementing

28. Management Information Systems

29. Network Analysis and Flow Charts

30. Effective Meetings

31. Use of Consultants and Contractors

32. Styles of Management

33. Goal Setting

34. Managing in an Era of Scarce Resources

35. Training Plan Development

36. The Manager as a Leader

37. Affirmative Action

38. Discipline

39. Management Control Techniques--- including statistical data

40. Dealing with Strikes

MANAGEMENT DEVELOPMENT TOPICS FOR <u>TOP MANAGERS/EXECUTIVES</u>

1. Orientation and Introduction to Top Management and the Role of the Transit Executive

2. Dealing with the Media

3. Strategic Planning

4. Computers and Organization

5. Labor Relations and Negotiations

6. Security

7. Transit Board Relations and Effectiveness

8. Transit Fares and Pricing

9. Financial Management and Budgeting

10. Marketing

11. Program Evaluation

12. Communication---including presentation techniques

13. Stress Management

14. Time Management

15. Organization Design and Development

16. Decision Making

17. Leadership

18. Problem Solving

19. Personal Finances and Retirement

20. Working with Political Bodies

21. Decision Support Systems

22. Change Management

23. Selection, Training, Evaluation of Managers and Supervisors

24. Discipline Policies

25. Contemporary Organizations and Management

26. Effective Meetings

27. Community Relations and Support

28. Use of Consultants and Contractors--- including policies on this

29. Styles of Management

30. Organizational Power and Influence

31. Organizational Diagnosis

32. Goal Setting and Policy Making

33. Human Resource Development

34. Management of Organization's Environment

35. Management in an Era of Scarce Resources

36. Management of Change

37. Organizational Representation and Liaison

38. Policy Implementation

39. Productivity

40. Affirmative Action Policy

41. Dealing with Strikes

TOPIC INFORMATION FORM

TOPIC NAME: MEDIA:

AUDIENCE (RANK OR   FREQUENCY GIVEN:
OTHER CATEGORY):

RESOURCE PERSON(S):   DATE OF CURRENT LESSON
                                     PLAN OR MATERIALS:

TOPIC INFORMATION FORM

TOPIC NAME: MEDIA:

AUDIENCE (RANK OR   FREQUENCY GIVEN:
OTHER CATEGORY):

RESOURCE PERSON(S):   DATE OF CURRENT LESSON
                                     PLAN OR MATERIALS:

D-1

Estimate for Videotaping
A Presentation   30 December 1982

META**MEDIA**   0324 S.W. Abernethy, Portland, OR 97201, 503/227-5146

Mr. Jim Marshall
9809 N. Edison
Portland, Or. 97203

Dear Mr. Marshall:

Enclosed is the estimate for videotaping your pre-

sentations.

Look forward to working with you.

Sincerely,

F.A. Hutchison

enclosure

ESTIMATE FOR JIM MARSHALL
1 - 60-minute presentation   on 3/4" cassette
1 - 30-minute presentation

I.	Script consultation	$ 384.
II.	"Prep" - pre-light/rehearse talent	660.
III.	Production Crew	2,100.
IV.	Post-production crew	720.
V.	Equipment	
	A. Production	1,560.
	B. Post-production	600.
VI.	Videotape stock	220.
VII.	Miscellaneous (includes LD phone calls catering lunch/coffee for crew, mileage and supplies)	240.
	TOTAL:	**$ 6,484.**

NOTE: 1)   This estimate does not include the cost of dubbing the master 3/4" cassettes to 1/2" cassettes.

2)   This estimate makes the assumption both presentations (60,30 minute) can be done in one 12-hour day. If for some reason it's decided that a rehearsal day is needed, or for some unforseen reason an additional production day is necessary, increase the estimate by $3,800.

3)   This estimate assumes the auditorium or presentation facility is being provided at no cost.

F.A. Hutchison

DEVELOPING A TRANSIT AGENCY TRAINING PLAN

Two One-Day Workshops

Sponsored by:

ρϑυ

PORTLAND STATE UNIVERSITY

June 18, 1984

Olympia, Washington

June 25, 1984

Salem, Oregon

WORKSHOP OBJECTIVES

Designed for personnel officers and middle managers of transit agencies, the workshop will address model training plans developed as a product of research performed at Portland State University. It will emphasize the importance of training plan development and techniques for more effectively implementing them in transit agencies.

WORKSHOP STAFF

The instructor is:

> Daniel O'Toole
> Associate Professor
> Public Administration
> Portland State University
> Portland, Oregon

The workshop is coordinated by Dr. Sheldon M. Edner, Assistant Director, Center for Urban Studies, Portland State University, (503) 229-4042, and is sponsored by Portland State University through the UMTA-sponsored Center for Transit Research and Management Development program.

PROGRAM FEES

The registration fee for each workshop is $90.00, materials and luncheon included.

ACCOMMODATIONS

SALEM -   The session will be held in the Capitol Building, Room 257.
           Accommodations will be available at the Rodeway Inn, (503)
           370-7888. Please make reservations directly with the hotel.

OLYMPIA - The session will be held in the Transportation Building, Room
          3F21. Accommodations will be available at the Vance Tyee Motel,
          (206) 352-0511. Please make reservations directly with the hotel.

PRELIMINARY AGENDA

8:30 am   Registration and coffee

9:00   *Introduction*:

           Introductions, welcome and overview of the workshop.

9:30   *A Comprehensive Training Plan*:

           A tool for managing the organization's training efforts.

10:00   *A Visual Approach To Training Plan Development*:

           Examination of a process managers can use to create a comprehensive training plan and the results of recent transit agency experience with this approach.

12:00 pm   Luncheon

1:30   *Developing Your Training Plan*:

           Initial application of the visual approach to the workshop participants' agencies. Please bring a copy of your agency's organization chart to the workshop.

2:45   *Using The Final Product*:

           How to implement, manage, and monitor use of a comprehensive training plan.

3:45   Workshop wrap-up.

Monterey-Salinas Transit

Letter from Mr. William Bernier,
Monterey-Salinas Transit, Monterey, CA

January 28, 1985

Daniel E. O'Toole
Center for Transit Research and Management Development
Portland State University
PO Box 751
Portland OR 97207

Dear Mr. O'Toole:

I was a member of the workshop in Olympia on June 18, 1984, which discussed the creation of a training plan. I want to thank you for that workshop and the material presented.

As a result, I have worked on a training plan based on that material and I am sending you the Development Topics that will be used at our Agency. I hope they may be of use to you in future presentations.

Thank you.

Sincerely,

William P. Bernier

WPB:bhc
encl: Development Topics

IX. REFERENCES

1. For instance, see Byron Lewis, "Improved Training for Transit Personnel," Transit Journal, Vol. 3, No. 1 (January 1977), pp. 97-100.

2. Robert C. Lieb, "Managing the Transit Industry's Human Resources," Transit Journal, Vol. 4, No. 3 (Summer 1978), pp. 27-40 for a discussion of the benefits of training for transit agencies.

3. See James Marshall, Daniel E. O'Toole, and Francis Sargant, "A Visual Approach to Training Plan Development," Public Administration Review, Vol. 43, No. 2 (March/April 1983), pp. 166-175 and Francis Sargant, James Marshall, and Daniel E. O'Toole, "In-Service Instruction Program Covers All Levels of Training," Fire Engineering, Vol. 136, No. 3 (March 1983), pp. 20-21.