

ALAMEDA-CONTRA COSTA TRANSIT DISTRICT



STAFF REPORT

MEETING DATE: 3/8/2023

Staff Report No. 23-149

TO: AC Transit Board of Directors
FROM: Michael A. Hursh, General Manager/Chief Executive Officer
SUBJECT: Progress in Training Partnership

ACTION ITEM

AGENDA PLANNING REQUEST:

RECOMMENDED ACTION(S):

Consider receiving an update on the AC Transit and ATU Local 192 Labor Management Training Partnership and approve a three-year sole source contract with Balance.point Strategic Services.

Staff Contact:
Salvador Llamas, Chief Operating Officer

STRATEGIC IMPORTANCE:

Goal - High-Performing Workforce
Initiative - Employee Recruitment, Training and Retention

Implementing workforce and career ladder programs are critical to develop and to attract a quality workforce in an evolving marketplace, competing for bus operators and mechanics.

BUDGETARY/FISCAL IMPACT:

The proposed contract cost is \$175,000 per year and is included in the FY 2022-23 Operations Budget.

BACKGROUND/RATIONALE:

AC Transit and ATU Local 192 formed a Labor and Management Training Partnership Leadership Team named Progress In Action (PIA), to oversee two new programs established in the 2016 collective bargaining agreement: Coach Operator Mentor Training Program and Mechanic Helper Training Program. The intent of these programs is to focus on improving employee retention and well-being, create career ladders for difficult-to-fill positions, reduce workplace stress, and improve customer service and employee satisfaction. PIA retained the services of Balance.point Strategic Services (BPSS), a neutral third-party firm and subject matter expert to facilitate the start-up of these new training programs.

Since partnering with BPSS, AC Transit has been creating, designing, developing, and implementing innovative, transformative leading-edge programs unique in the public transit industry. As a result, AC Transit is evolving into the premier transportation agency capable of hiring members from the very communities it serves by creating life-transforming and sustaining career pathways. The following highlights District-critical programs as

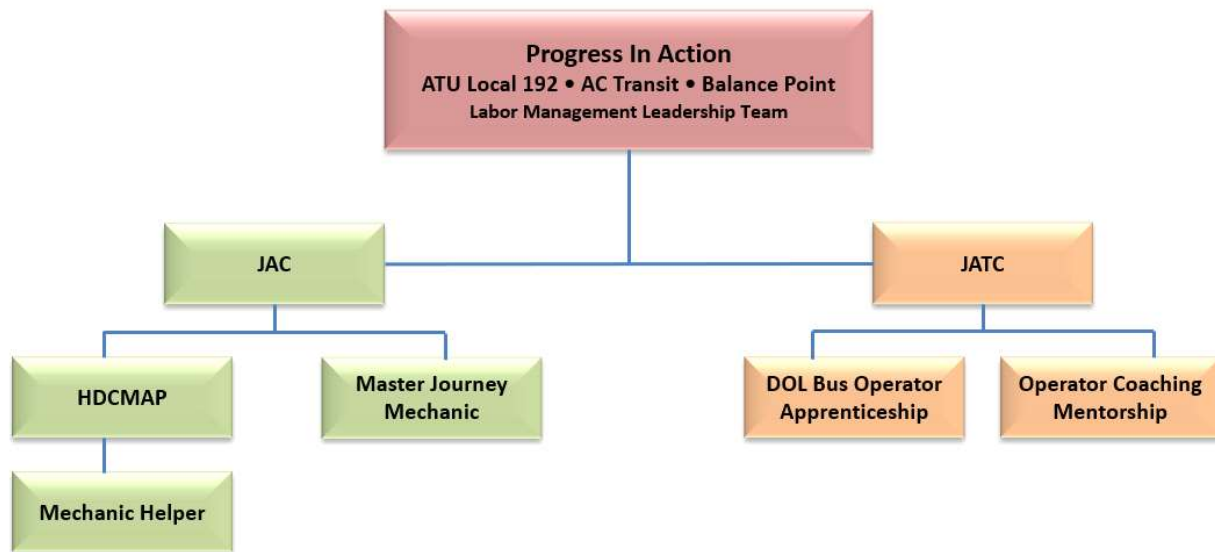
the result of the PIA labor management leadership team:

- United States Department of Labor (USDOL), Office of Apprenticeship, Bus Coach Operator and the Operator Coaching Mentorship Program (Operator Mentor Program)
- State of California, Department of Industrial Relations, Division of Apprenticeship Standards, Heavy Duty Coach Maintenance Mechanic Apprenticeship Program (HDCMAP)
- Maintenance Career Ladder Training Program and the Mechanic Helper Program (Mechanic Helper Program)
- Master Journey Level Mechanic

Additionally, PIA-supported committees connected to the aforementioned programs include:

- Joint Apprenticeship Training Committee (JATC) consisting of PIA member representatives in District and ATU Local 192 leaders and connects to US DOL and Operator Mentor Program.
- Joint Apprenticeship Committee (JAC) consisting of PIA members, District managers, and ATU Local 192 mechanics and connects to HDCMAP, Mechanic Helper Program, and Master Journey Level Mechanic.

Pictured below is the organizational chart which illustrates the hierarchy for PIA. Executives from ATU Local 192, AC Transit, and BPSS form the labor management leadership team that oversees the workforce development programs and serve as executive advisors to the Joint Apprenticeship Transportation Committee (JATC) and Joint Apprenticeship Committee (JAC).



BPSS Sole Source Contract

Staff is recommending a sole source award to BPSS because of their unique, privileged, and historical insight of the relationship between District staff and collective bargaining units. Given the volume and complexity of the

aforementioned programs, PIA meets regularly, often monthly. Each meeting requires Balance.point Strategic Services for facilitation and guidance as the neutral, third-party advisor to the PIA. The importance of a neutral, third-party advisor/participant is for four primary reasons:

- 1) ATU Local 192 elections result in changing union leadership;
- 2) District managers also change positions;
- 3) Developing programs require consistency as the result of these personnel changes (described in #1 and #2); and
- 4) A neutral, third-party advisor provides unbiased directional and operational guidance enabling current PIA members to debate openly about a program's merit, efficacy, and progress.

Also, as the principal and founding partner of the PIA, retaining BPSS as a neutral, third-party advisor is vital to the continuance and efficacy of its second-tier committees in the JAC and JATC, and its respective programs. Moderating between PIA and its committees ensures that expectations are managed, and communication and support are available when program, developmental or implementation challenges arise.

Furthermore, BPSS is a partner of and direct connection to California Transit Works! (CTW). Formed in 2017, CTW is a California consortium of transit agencies, transit unions, and colleges focused on transit workforce development. CTW's labor management partnerships, thanks in large to BPSS, are impressive, working with the District and ATU Local 192, Valley Transportation Authority and ATU Local 265, Golden Gate Transit and ATU 1575, Sacramento Regional Transit and ATU 256, San Joaquin Regional Transit District and ATU 256, and Riverside Transit Agency and ATU 1277. Each location also has its labor management partnerships and similar employee-based programs.

CTW also leads the "*ICT (Innovative Clean Transit) 2040: Are We Ready?*" initiative, facilitating zero-emission readiness webinars as transit, education, and labor from across the country meet to discuss the workforce (development) of the future. CTW provides the PIA along with its JATC and JAC committees opportunities to participate directly in webinars intended for developmental support and educational materials.

Equally significant, BPSS works in concert with the Workforce and Economic Development (WED) Department of the California Labor Federation. WED secures funding through Employment Training Panel (State of California) grants that reimburse staff time for program development specific to zero-emission, career ladder programs, and for training classes taught in support of those programs. Since 2018, the District received funding totaling nearly \$300,000 supporting previously described programs herein including the pilot launch of the Operator Mentor program.

BPSS - Three-Year Contract

Thus, retaining *Balance.point Strategic Services* for the next three years is necessary to ensure the following continue to evolve and/or are fully implemented and self-sustaining:

- 1) Labor Management Leadership committees: BPSS will continue to serve as a neutral, third-party

advisor to the PIA, its second-tier committees (JAC and JATC), and its respective workforce and career ladder programs.

- 2) Operator Mentor Program: BPSS will serve as the Subject Matter Expert (SME) to work in concert with PIA, JATC and Mentor Coordinator to provide the following:
 - a. create marketing campaigns to recruit new mentors to keep pace with a growing program;
 - b. develop on-the-job training programs to upskill new mentors;
 - c. enhance performance analytics to assess the efficacy of the program's retention and accident reduction facets; and,
 - d. ensure program continuity if, in early 2024, union membership elections affect the current PIA membership team.

- 3) US DOL Data: BPSS will serve as SME to:
 - a. ensure that bus operator mentor and bus operator mentee data is maintained and sustained correctly in the federal learning management database system (known as the Registered Apprenticeship Partners Information Database System, or RAPIDS); and,
 - b. to guide the Mentor Coordinator or delegated support staff to ensure operational functionality with the RAPIDS.

- 4) Mechanic Helper Program: BPSS to serve as SME to:
 - a. coordinate workgroups with and for PIA, JAC and Apprentice Mentor to re-assess and re-design the program for maximizing applications and participation;
 - b. expand recruitment policies; and,
 - c. design career pathways into the program for external candidates.

- 5) Master Journey Level Mechanic: BPSS to serve as SME to:
 - a. coordinate with PIA, JAC and Apprentice Mentor to ensure current collective bargaining agreement entailments are the foundation of program development;
 - b. coordinate with CTW to assist JAC in program development;
 - c. develop applicable job specifications and recruitment testing processes;
 - d. implement program and support training processes required for implementation; and,
 - e. evaluate program effectiveness as related to shop floor maintenance support.

ADVANTAGES/DISADVANTAGES:

The advantage to approving a three-year sole source contract with Balance.point Strategic Services will ensure PIA continues to receive the necessary subject matter expertise to implement and sustain all workforce and career ladder programs.

ALTERNATIVES ANALYSIS:

No alternative analysis was conducted by staff for this Agenda item.

PRIOR RELEVANT BOARD ACTION/POLICIES:

Board Policy 465 - Procurement Policy

ATTACHMENTS:

None

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