



Transit Workforce Shortage

Toolkit

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Prepared for:

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Association

Prepared by:



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THE TOOLKIT

How to Use This Toolkit

This toolkit guides agencies through a workforce shortage assessment and basic steps in developing strategies to enhance workforce management processes and improve outcomes. It repackages the lessons learned from transit agency staff and operations workers throughout North America into a set of questions and problem statements: agencies can focus their efforts on improving their workforce management by identifying which issues they have and linking them to strategies peers have identified as successful approaches to resolving them.

The toolkit begins with a worksheet prompt for agencies to understand their current processes and basic metrics surrounding recruitment, hiring, and retention. After understanding the overall process and procedures in place, agencies can move on to a self-assessment. The self-assessment connects issues with recruitment, hiring, and managing the existing workforce to strategies identified through the **APTA Workforce Shortage Study**. Each strategy category includes a set of suggested performance indicators that agencies can use to pursue solutions.

While completing the self-assessment and exploring strategies, agencies can consider the maturity of their processes with the capability maturity assessment matrix. This matrix helps agencies understand the quality of their processes to ensure they are efficient and self-sustaining even as other organizational changes occur.

UNDERSTANDING YOUR PROCESS AND YOUR NUMBERS

Agencies must first understand the state of their hiring pipeline and attrition numbers before they begin identifying inefficiencies, bottlenecks, and barriers in the recruitment, hiring, and retention process. Agencies should start by completing the worksheet in **Table 1** to outline their recruitment, hiring, and retention processes. This worksheet aims to identify recruitment, hiring, and retention components that could impact workforce headcounts. As you respond to each series of prompts, note any potential problems you identify along the way. This exercise in and of itself may help reveal gaps, barriers, and bottlenecks in your process and help you complete the self-assessment in the next section.

After each section in the worksheet are some key metrics to collect and report. If your agency is unable to collect some of these data points, you may first wish to focus on establishing approaches to gather information about the effectiveness of your practices or processes. In addition to the summary metrics in the worksheet below, more performance indicators are listed under each strategy section later in this toolkit. Agencies should select metrics that describe issues they are or may be having, reveal characteristics about their challenges they may not have been aware of, and measure progress towards resolving them.

TABLE 1: RECRUITMENT-HIRING-RETENTION PROCESS WORKSHEET FOR AGENCIES

Recruiting		Agency Answer	Notes (potential issues, barriers within process)
PROCESS COMPONENTS	Advertising: How do potential applicants hear about a job? List all of the places your agency advertises job postings. These can include print, online, and in-person advertising activities.		
	Partnerships and Referrals: Is there anyone or any organization who helps identify potential applicants? List any partnerships your agency uses to recruit applicants.		
	Application: What does the employment application look like? How do potential employees submit applications? Describe the length, format, and content of an employment application.		
	Requirements: What are the minimum requirements for operation workers? How are they explained to applicants? List the requirements for employment and how or when they are communicated to applicants.		
METRICS	How many potential applicants see or engage with a job posting and/or engage at a recruitment event?		
	How many potential applicants begin an application?		
	How many potential applicants begin an application but do not complete an application?		
	How many applicants complete an application?		
	How many applicants are invited to an interview, accept the interview, and attend the interview?		
Hiring		Agency Answer	Notes (potential issues, barriers within process)
PROCESS COMPONENTS	Applicant Screening: What are the steps taken to review applications? How long does the process take, and who is involved? List the steps and parties involved in the application review process.		
	Testing Requirements: What testing requirements exist for employment? How long does it take for an applicant to complete testing requirements? List the specific tests (drug, physical, background, etc.). Note where or how these tests are administered and how long it takes to return results.		

Hiring (Cont.)		Agency Answer	Notes (potential issues, barriers within process)
PROCESS COMPONENTS	Offers of Employment: How are applicants offered employment? What is the overall timeline from when a typical applicant applies to when they are offered employment to when they begin work and earn their first paycheck? List all the relevant steps to extend an offer of employment and complete the hiring process.		
	Training and Onboarding: What training and onboarding are offered to new employees? How long is each component of the training and onboarding program? How long is the time between the acceptance of employment to the start of training and onboarding? Explain the components of the training and onboarding process, where these activities occur, and how long they last.		
METRICS	How many applicants interviewed are extended offers of employment?		
	How many applicants accept offers of employment?		
	How many applicants who accept offers fail background checks or other tests?		
	How many applicants accept offers and pass background checks but drop out before the first day?		
Existing Workforce (Retention)		Agency Answer	Notes (potential issues, barriers within process)
PROCESS COMPONENTS	Compensation: What is the compensation structure like for workers? How often and when do raises occur? What are raises based on (merit, tenure, responsibility)? How is overtime work structured? Are there differences between part-time and full-time employee compensation? Describe the overall compensation structure offered to employees of different types, at different levels and over time.		
	Advancement: How are employees able to advance in their careers at the agency? Can they move upward within their own departments or laterally to other departments? How are career advancement opportunities communicated to the workforce? Describe the criteria for career advancement.		
	Benefits: What benefits are offered to employees? Is there a wait time between beginning employment and accessing benefits? How are benefits communicated to employees? How many employees use the various benefits (if known)? List all benefits, including health, family care, paid time off, educational support, employee assistance programs, etc.		

Existing Workforce (Retention) (Cont.)		Agency Answer	Notes (potential issues, barriers within process)
PROCESS COMPONENTS	On-going Training: What types of training are offered to employees after the initial training and onboarding period? How often is it offered? Is training paid, unpaid, and/or subsidized? What formats are training offered (virtual, in-person, hybrid, learn on your own, through other institutions)? List required and optional training for employees.		
	Communication: How are policies and procedures, changes in service (detours or normal service changes), or other decisions communicated to employees? On a daily basis, how do employees communicate with their supervisors/managers? During critical incidents, what are the communication procedures? Describe how workers communicate with leadership and their direct supervisors in normal circumstances and during incidents.		
	Worker Schedules: How are worker shifts determined? What factors influence how and when an employee selects their work schedule? What types of shifts do workers have to select from? Are there minimum requirements for shift selection (e.g., an employee must work one weekend per month)? List the rules for selecting shifts by an employee and describe the types of shifts they have to select from.		
	Safety and Worker Protection: How are employees protected at work from assaults, contracting COVID-19, exposure to the elements, etc.? If an incident occurs, how is the employee supported by management and/or peers? Describe the policies, procedures, and/or physical designs in place to protect employees.		
METRICS	How many employees left in the last year? In the year prior to that?		
	How many employees complete training but do not finish their first year?		
	What are the reasons employees leave (e.g., retirement, health/well-being, better pay, family care responsibilities, etc.)? How many leave for each of those reasons?		
	When employees leave, where do they go (e.g., another job in the transportation industry, a job outside the transportation industry, to pursue education, leave the workforce, etc.)?		

SELF-ASSESSMENT

After establishing an understanding of your current processes, use the self-assessment questionnaire (**Table 2**) to identify strategies to improve your workforce management practices. The table is divided into three categories, each including several problem statements. If a problem statement resonates with your agency's issues, review the strategies identified in the third column: the letter and number combinations refer to specific strategies below.

TABLE 2: AGENCY SELF-ASSESSMENT

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

CAPABILITY MATURITY ASSESSMENT

While this toolkit is focused on helping agencies identify process gaps for recruiting, hiring, training, and retaining workers, some agencies may also wish to understand the quality of their processes to ensure they are efficient and self-sustaining even as other organizational changes occur. These agencies may find the concept of capability maturity useful.¹ In conjunction with strategic choices about workforce management processes, agencies should also consider how well their processes are functioning. This will make performance management not just possible but continuously better over time. **Table 3** defines five levels of capability maturity and provides examples of workforce management in the transit agency context. If desired, return to the worksheet (**Table 1**) and add your agency’s capability maturity level for each process component.

Table 3: Capability Maturity Characteristics

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

¹ Capability maturity was originally developed by researchers at Carnegie Mellon University as the Capability Maturity Model (CMM). Now known as the Capability Maturity Model Integration (CMMI), it has been used for organizational performance improvement across many industries including aerospace engineering, government, and any other organization that relies on processes to conduct its work. This section summarizes core CMMI concepts. For further information, see [Godfrey, Sally \(2008\), presentation to the National Aeronautics and Space Administration](#).

Strategies

Strategies are organized into five topic areas: recruiting, hiring, training and Onboarding, working conditions and policies, and agency culture and morale. These strategies were derived from the research (interviews and surveys) conducted for this study. The Error! Reference source not found. section further describes peer agencies' exemplary programs.

Use the self-assessment to determine which strategies might be useful to your agency—or browse the strategies for ideas. Useful performance indicators are at the conclusion of each strategy topic. These indicators will help your agency understand how it is performing in the topic area.

RECRUITING STRATEGIES

R1 Establish a performance reporting system for recruitment and hiring processes.

Agencies must first understand the state of their hiring pipeline and attrition numbers before they begin identifying inefficiencies, bottlenecks, and barriers in the recruitment, hiring, and retention processes. Agencies should begin by identifying all the components of recruitment, hiring, and retention that could influence workforce headcounts, noting gaps, barriers, and bottlenecks to meeting headcount goals. Agencies with limited visibility into their processes may then focus on selecting metrics that describe issues they are or may be having, reveal characteristics about their challenges that they may not have been aware of, and measure progress towards resolving them.

R2 Increase agency recruiting capacity.

If an agency's advertising and marketing campaigns see success in capturing applicants, human resources teams may encounter backlogs due to increases in applications. One approach to handling backlogs is to hire more human resources personnel to distribute the workload. Instead of hiring human resources personnel at the mid-senior to senior level, agencies can create pathways for interns or temporary workers to move into full-time positions. Another form of increased capacity includes developing data systems to track and analyze recruitment. Data systems can analyze important data such as hiring, attrition, and retention rates so agencies can anticipate future hiring rather than responding to vacancies.

R3 Enhance marketing and agency messaging.

If an agency is not sending the right message to the best potential applicants, it could be missing out on countless candidates that fit the role. At the internal level, agencies should consider whether their branding conveys the positive aspects of working for them. When advertising positions, agencies should emphasize the “value proposition” that they offer, which can include longevity, having a career rather than just a job, and the opportunity to do something positive for one's community.

Recruiting should also target the right people. Key strategies to achieve this include targeted mailers to zip codes of current employees or potential employees with the necessary skillset or similar level positions. Agencies can also reach potential candidates using targeted ads and video content on social media. Agencies can also attend public events with the right candidate pool.

R4 Cultivate, evaluate, and strengthen referral networks.

Agencies can look to the communities they serve for applicants that can develop the skillsets needed for openings through referral networks. These networks are built by identifying local partner networks such as workforce development programs, refugee and immigrant support organizations, and local high schools, community colleges, and technical schools. Existing partnerships can be evaluated and strengthened by measuring success and identifying shortcomings or barriers in the partnership. These barriers can be addressed by building up resources such as training in other languages or record expungements. It is important to note that these relationships with community partners must be fostered in order to maintain community trust.

R5 Promote accessibility in the application process.

To broaden the pool of applications, agencies can promote accessibility by improving online applications while creating assistance programs and procedures to help people fill out applications. Agencies can review, evaluate, and redesign their current website and online applications for mobile use to ensure they are not excluding applicants who may not have access to a personal computer or laptop. Assistance programs and procedures that help people fill out

applications can reduce barriers for applicants who are not tech-savvy and may have trouble filling out an online application independently.

Agencies could also consider making simple changes to their online application process. This can include eliminating redundancies (such as applications requiring a resume and submitting a separate job history), simplifying the application’s language, and ensuring that requests for additional information happen further along in the interview process.

Useful Performance Indicators

Indicator Question	Use
<p>How many outreach events do we attend per month by type, such as career fairs or pop-up recruitment at community events?</p> <p>On average, how many applicants do we get per outreach event by type?</p> <p>How many hiring actions do we have each month?</p> <p>On average, how many hiring actions do we get per outreach event by type?</p>	<p>Tracking the number and type of recruitment activities and their outputs enables an agency to understand the effectiveness of each activity. For example, if career fairs at technical schools tend to yield fewer applications than at neighborhood events, recruiters can either reprioritize their resources or re-examine their approach to technical school recruitment.</p>
<p>How many prospective employees begin an application but do not finish or submit it?</p>	<p>Understanding whether application completion is a factor in recruitment can indicate that the application itself may need revision or additional resources to help applicants complete them.</p>

HIRING STRATEGIES

H1 Expand interview capacity.

The interview process can often be cumbersome for human resources departments, especially if interviews are long and personnel is limited. During worker shortages, agencies could consider shortening interviews with potential candidates to speed up the process. Shortening interviews allows for the capacity to conduct more interviews and speed up the hiring process. Interview capacity can also be expanded by increasing the number of people who can conduct interviews and make offers. This strategy would alleviate the burden on human resources personnel with limited capacity. Holding open interviews at advertised times or regular intervals could also lighten workloads for human resources personnel by eliminating the scheduling process for potential candidates.

H2 Hold mass hiring events.

In the event of increased demand for a large amount of new personnel, agencies can hold mass hiring events. Events should include portions of the hiring process that can be conducted all at once. These could include applying for a position, participating in an interview, receiving a contingent offer, and taking a drug test throughout the course of one event. It is important to choose convenient locations or latch onto existing events (such as fairs or community events) where the desired population is already in attendance.

H3 Audit and streamline the hiring process.

Agencies can look internally at their hiring process to identify delays and chokepoints in the process. The hiring process can be reevaluated by asking questions such as: How long does it take to complete the hiring process on average? What are the specific steps an applicant must take? How are the process and their progress communicated to the candidate? What or where are the chokepoints in the process? Answering these questions can guide agencies to create a streamlined hiring process that can shorten the time needed to hire new personnel and create more flexibility. It can also help capture prospective employees who accept other positions in the time that it takes for the transit agency to review their application.

H4 Evaluate testing requirements.

Testing requirements can often become roadblocks for applicants who fit all the necessary requirements for a job. A common issue with testing requirements is inadequate communication. Agencies should communicate drug testing and background check requirements upfront to avoid turning down applications further along the process. This is especially an issue in states where cannabis consumption is legal, and applicants may be unaware that requirements exist.

Agencies could also evaluate background checks and testing requirements to ensure they meet agency safety needs without being overly stringent. One example of this is shortening the lookback window for driving infractions. Agencies could also begin to accept CDL medical certification from outside authorities or organizations. To minimize the need for CDLs, agencies could also determine if they are required for all vehicles and consider integrating vehicles that do not require a CDL to operate. This could present the opportunity to bifurcate operators and increase the potential pool of applicants and successful hires.

Useful Performance Indicators

Indicator Question	Use
How long does it take for us to decide whether to interview an applicant?	Keeping candidates engaged in the hiring process increases the likelihood that they will reach the interview and accept a role if offered a position. Measuring the duration of attrition at different stages of the hiring process will help agencies determine how to target improvements.
How long does it take for us to contact an applicant once we have decided to interview them?	
How long does it take to schedule an interview once we have contacted an applicant?	
How many applicants who interview are also extended offers of employment?	Tracking the effectiveness of decisions to advance candidates can help agencies understand if they are evaluating candidates well.
How many applicants accept the employment offer we extend?	
How many applicants who accept offers fail background checks?	Understanding attrition at different phases after applicants accept roles will help agencies determine how to keep new hires engaged, implicating training and onboarding strategies described in another section.
How many applicants who accept offers and pass background checks drop out before the first day?	
How many new hires who attend the first day drop out before training begins?	

TRAINING AND ONBOARDING STRATEGIES

T1 Implement early training programs.

To avoid high attrition rates from new hires who do not show up on their first day of work and to capture potential new hires who would otherwise lack necessary certifications, agencies can implement changes in their training programs that prioritize retention. For example, one of the strategies agencies could implement include “early start” training programs in which new hires complete the administrative components of onboarding, familiarize themselves with the agency’s culture and operations, and begin to receive a paycheck and benefits right away. Early training programs could also include training that allows employees to familiarize themselves with routes, mentally preparing them for the job. Also, by implementing early training programs, gaps between the hiring date and the first day are reduced, minimizing the risk of new hires taking a job elsewhere.

T2 Expand on-the-road training.

The first days of a job as a new operator can be very stressful and often lead to early quits. To address this issue, agencies can expand their on-the-road training programs to create environments where new workers feel safe and supported as they begin their roles. On-the-road training with experienced operators in the early days can provide new workers guidance that might not be included in formal training or onboarding activities. Experienced operators can share their strategies to deal with certain circumstances that might be overlooked in the onboarding process.

Agencies can also expand on-the-job training time where an experienced operator accompanies new hires in the first few days of work. This strategy can help new drivers acclimate more quickly, boost morale, and connect new hires to senior operators that can offer guidance and support immediately and be a resource throughout their early years. New

hires can also receive important guidance through mentorship programs where mentors are also compensated for their additional role.

T3 Develop accessible and flexible training.

In response to the COVID-19 pandemic, many agencies nationwide developed online or hybrid training formats. Agencies could consider continuing these formats to promote flexibility for new hires, especially considering how many operators must balance difficult schedules and their personal lives. Training can also be offered at various hours of the day or on different days of the week to increase flexibility for drivers with atypical schedules.

To foster accessibility for all new hires in communities with a large immigrant population, agencies can partner with English as a Second Language (ESL) organizations to offer training for people with limited English proficiency. This strategy can help retain new hires who may have limited English and help them feel confident in their skills and training.

T4 Help applicants acquire CDLs.

If an agency does not see enough applicants with a CDL, it should consider establishing an in-house entry-level driver training (ELDT) program that complies with federal requirements. Alternatively, agencies can partner with an existing ELDT program at a local technical school or workforce development agency. Agencies could also streamline CDL permitting through early training programs that allow applicants to take a permit test course and complete their permit test within a week.

T5 Train for positive work culture.

Low morale amongst transit operators has become a common issue, especially due to the rise in negative social interactions with the public and the feeling of isolation as a result of the COVID-19 pandemic. In response, agencies could consider implementing training to reinforce agency values in new recruits that stress the importance of an agency’s positive work culture. Along with this, agencies can create employee recognition programs structured around core values. Other valuable training includes de-escalation training to help operators handle negative interactions with passengers as well as defensive driving training.

Useful Performance Indicators

Indicator Question	Use
How many new hires begin and finish training?	Understanding how new hires transit the training and onboarding process helps agencies understand whether and how their onboarding processes are succeeding (or failing) to prepare new hires for full-time work.
How many new hires begin but do not finish training?	
How many employees complete training but do not finish their first year?	

WORKING CONDITIONS AND POLICIES STRATEGIES

W1 Increase capacity for better scheduling.

Scheduling has been noted as one of the primary drivers for worker satisfaction. However, scheduling is an especially complicated issue because of how it can affect agency operations at many levels. In response, agencies can create a team or identify an individual that specializes in improving worker schedules and/or identifying policy changes that would help improve worker schedules. A team could include staff from different areas of an agency, including human resources, operations, finance, and union representatives.

Agencies should also consider how scheduling changes affect the entire system’s operations. A systematic approach to understanding scheduling allows the agency to understand workers’ concerns and how to address them. Finally, agencies should develop systems (in particular, software platforms) to ensure that scheduling policies are followed.

W2 Reevaluate worker schedules.

Traditional shifts are sometimes not suitable for agency needs due to the intensity of working as an operator and the irregular work schedule. Agencies could consider making changes to work schedules that promote flexibility and also ensure that workers are not overburdened by scheduling issues that are often overlooked. One option for agencies is to consider offering workers the option to work four ten-hour shifts rather than five eight-hour shifts, providing workers

with more days off. Agencies should establish or rework policies that promote flexibility and be willing to look to peer agencies in search of new policies to pilot.

W3 Expand full-time work.

Some agencies require new employees to begin as part-time employees, which they often find less appealing than full-time positions at other companies or organizations. Agencies could consider hiring new employees who would have been part-time as full-time workers. In the interest of fairness, agencies pursuing a changed policy should offer existing employees who are already working part-time the option to convert to full-time before extending any full-time offers to prospective hires.

W4 Incentivize shift distribution through pay.

Agencies can help distribute work through a variety of incentive pay strategies. A popular strategy throughout many industries is to offer incentive pay to work during less desirable times or days or on certain difficult routes. Although this is an excellent strategy for distributing operators, it is important to note that a shift that is considered desirable can vary between workers.

Seniority is another common factor in selecting worker shifts, leading new hires to work shifts that are least desirable or difficult to cover. In response to this, agencies can offer hiring bonuses for the first months to incentivize working difficult shifts. Agencies can also offer retainment bonuses to keep new hires from leaving.

W5 Protect worker health and safety.

The COVID-19 pandemic and its effects have brought many issues concerning worker health and safety to light. Many potential candidates still fear contracting COVID-19 when it comes to accepting a position as an operator. While agencies cannot eliminate infection risk for any transmittable illness, they can take steps to protect workers, including implementing policies to prevent the spread among staff and training staff members to track illness.

Even before the COVID-19 pandemic, negative interactions between operators and passengers increased nationwide. To protect their workers, agencies could implement strategies to deter harassment and assault. Some agencies have used “inform, not enforce” policies to help prevent escalation. Operators are instructed to inform customers of agency rules and rely on procedures involving their supervisors and police for enforcement.

Other agencies have put more actively supportive practices in place, where workers can contact headquarters or other support teams for assistance during incidents. For example, direct lines of communication between road supervisors can streamline addressing issues rather than communicating through dispatchers. Another agency implemented a “live look-in” practice using bus CCTV, which alerts dispatch or local police and allows them to assess the situation while operators do not have to escalate a situation by calling the police in front of a confrontational passenger. Also, installing physical barriers for drivers can also make operators feel more protected.

De-escalation training can help workers feel they have the tools to prevent passenger conflicts from turning into violent or aggressive interactions.

W6 Restructure compensation and benefits to improve retention.

Agencies today have to compete with both transportation and non-transportation industries as the economy has rebounded from the COVID-19 pandemic, and there are record-low unemployment numbers. Carefully structured compensation increases can be an effective tool to improve retention throughout agencies. Although pay is an important factor in the retention of workers, agencies should also consider enhancing their benefits packages to attract new employees. Non-wage benefits that would make a big difference include on-site childcare and continuing education reimbursement programs, making starting and staying at an agency easier.

In terms of pay, agencies could also consider other incentives for retention, such as hiring bonuses and/or retention bonuses. Another strategy that has proven to be successful at retention is making training pay equal to new operator pay, with a raise after the first few months on the road.

It may be useful to also evaluate the local employment market to understand the competing employers and the wages and benefits of packages of those competing employers.

Useful Performance Indicators

Indicator Question	Use
How many workers separate from the agency? What are their reasons?	Agencies need to gather information about worker satisfaction frequently enough and act on what they learn quickly enough that attrition rates do not rise higher than the agency can hire and train replacements. While the indicators here may suggest quantitative analysis, a qualitative yet current understanding of morale will yield timely results as well.
What concerns do workers express to their supervisors and agency management?	
How often does the agency gather information about worker satisfaction?	
How often does the agency act on information it gathers from worker satisfaction surveys?	

AGENCY CULTURE AND MORALE STRATEGIES

C1 Create clear pathways for growth.

As the existing workforce demands clearer trajectories for job growth, agencies could start thinking about career ladders and how to motivate employees to pursue professional development. Agencies can start to think about career growth for their employees through training academies and opportunities for management. Pathways should also be explored for employees beyond the supervisor roles, but also for other roles in agency leadership or diagonal moves to non-operational departments.

Education assistance programs are another effective tool for recruitment and retention. Agencies could fund pursuing higher education degrees in related disciplines, including transportation planning, civil and structural engineering, finance, and construction management, among others. Reimbursement arrangements and partnerships with local educational institutions are another way to leverage existing pathways for promoting professional development.

C2 Develop programs for engagement, recognition, and acknowledgment.

Transit operations work is stressful and, in many cases, unrewarding due to the treatment many operators receive from the public. In response, agencies can foster a culture that values workers through positive affirmation, routine, and responsive engagement from leadership. Another valuable tool is the ability to provide feedback through frequent surveys. Employee recognition programs allow agencies to reward employees for their work and can also be tied to a company’s identity and core values.

Agencies can also use employee resource groups to create safe spaces for workers from marginalized groups. They serve as support groups for different focus areas (women, military veterans, black employees, etc.), each of which has a sponsor from executive leadership, a small budget, and someone from the agency’s talent management branch as a dedicated support resource. The groups bring in speakers, develop guidance and professional development opportunities for members, and also facilitate up-and-down communication throughout the organization.

Useful Performance Indicators

Indicator Question	Use
How often do employees voluntarily participate in professional development?	Morale is the product of repeated experiences between workers and their managers. Agencies can foster positive morale by encouraging positive interactions between workers and between workers and management. Tracking measures that indicate morale will help agency staff track their current status and take appropriate action if morale begins to slip.
Do employees believe they receive recognition for their work? Do separating employees share this view?	
Do workers have meaningful opportunities to gather and express themselves to agency management?	
Do workers believe that management “has their backs”?	