



Part 7
Case Studies



7.0 Case Studies

OC Transpo “Let’s Talk” and “Peer Support” Programs - Workplace Health

Case Study Snapshot

Two successful and innovative OC Transpo programs, **Let’s Talk** and **Peer Support**, relate to ensuring quality working environments for motor carrier passenger employees. These programs were developed to foster a healthy work environment by allowing employees to deal effectively with both work-related and personal issues that may impact mental well being, enjoyment of their work, and capacity to perform to the best of their abilities.

About OC Transpo

OC Transpo is the 397km City of Ottawa public transit system with a typical weekday ridership of 343,000 passengers. It employs over 2200 employees who provide bus, light rail, and accessible services to a population of 750,000. Its fleet includes 920 buses covering 218 routes; an 8km 3-train LRT system; and 130 dedicated ParaTranspo vehicles. City Council, supported by a Transportation Committee which includes nine members of Council, determines and guides the implementation of transit services.

About the Programs

Transportation systems rely on teamwork, communication, and customer service. Two elements, *quality of interpersonal relationships* and *resolution of work-related conflicts* have been identified by OC Transpo as important positive employee influences, contributing to work satisfaction, reduced absenteeism, better productivity, and employee retention.

For OC Transpo and the City of Ottawa, these lessons were brought to light in the most tragic of ways, a 1999 event that took place in the maintenance garage in which a former employee shot and killed 5 people, including himself.

In the aftermath of the incident, a trauma counselling team was brought in to work with staff, not only to help people deal with grief but to also look very carefully at organizational culture in order to determine the roots of the frustration and anger that led to the tragedy.

The combined team of staff and outside professionals identified a “dictatorial” management style and a strong sense that employees had no role in helping to shape the work environment. A prior (1996) organizational audit had also identified that the organization had traditionally focused on service delivery at the expense of the individual.

It was clear that both internal communication and shared responsibility for problem-solving were deficient, and recommendations for both **Let’s Talk** and **Peer Support** were a direct result of the process. Each of these programs is designed to address a distinct facet of workers’ needs.



Let's Talk

Let's Talk is a process that has been developed to involve people in the organizational decisions that affect them directly. Peer groups – employees who work in one area or similar areas—identify workplace issues and problems that are creating stress or unhappiness, and identify ways to solve those problems, developing solutions jointly with management as appropriate. Often these issues are “pressure points” that have the potential to become grievances.

Though **Let's Talk** is on the surface a venue for issue identification and problem resolution, it is also recognized as way of building a more trusting and mutually-supportive relationship between employees, supervisors and management.

Led by trained “Ambassadors” —personnel at any level and in any part of the organization who have taken specialized facilitator training offered free of charge by OC Transpo, groups of employees meet to:

- Identify and clarify the issue at hand
- Discuss a range of possible solutions
- Offer a group-developed solution to a vote
- Recommend action and put the solution into place

A typical “group” is composed of representatives from both the operator side and management. Six operators are paid to attend meetings that take place twice monthly. Management participants include representatives from the following groups: Supervisors, representatives of the Superintendent, Program Managers, Trainers, and Managers. All participants receive a three-day training program delivered by the City of Ottawa, and OC Transpo is now adding Meeting Effectiveness training sessions as well.

The program has proven to be an effective counter to negativity in the workplace. It provides an opportunity for all employees to learn new skills and to promote a more satisfying and productive work environment. A key to the process is valuing the input of any person at the table, and integrating the values of respect, cultural sensitivity, and democratic principles into the process.

A senior staff person in the Transit Operations Department explained, “The concept is easy to say, but somewhat trickier to do. Trying to get things accomplished in a timely way while respecting the need for people to be involved takes time, but it’s time well spent.”

From the beginning, OC Transpo leadership stood firmly behind **Let's Talk** as it found its footing, involved when asked to be, but purposely encouraging delegation to those most directly affected. Generally, **Let's Talk** sessions steer clear of discussion of collective bargaining issues, primarily because there are other mechanisms and processes in place for this purpose.

As the program has evolved, it has become strongly popular and is seen as a core expression of OC Transpo's organizational values. Program self-sufficiency has been strengthened by an on-going renewal process in which new people are trained and take on the cycling leadership role in the process.

Among key successes of **Let's Talk**, OC Transpo's Code of Conduct stands out as a seminal document that has involved countless hours of input and refinement from participants in the group sessions. Another example: **Let's Talk** is the focal point for working groups that have advanced new Vacation Allocation policies to senior management. These policies are now in place, and reflect a stronger sense of fairness and equality.

Peer Support

Another program developed in the aftermath of the 1999 tragedy, **Peer Support** emerged as an alternative to the more formal Employee Assistance Program.

The **Peer Support** network consists of a team of fellow employees who have completed an internally-provided, free of charge training program that gives them core counselling, problem-solving, decision-making and referral skills. Sometimes Peer Supporters provide specific insights and techniques; at other times it's all about lending a friendly, non-judgmental ear. Peer Supporters offer practical solutions or guidance about what might help, offer advice on how to defuse a stressful situation or provide important information or referral to a professional.

There are currently 36 Peer Supporters who have each received up to 30 hours of initial training in communication, listening, critical incident debriefing, stress management, bereavement, suicide intervention, confidentiality, conflict resolution, anger management, and stress diffusion. Peer Supporters also receive 16 hours a year of additional training in relevant topics.

The screening process is extensive, and a panel reviews applicants in a process which includes interviews. Final decision-making power for approval of new Peer Supporters rests with the Union President and the Director.

Two annual meetings are held in which participants discuss everything from contemporary "hot" issues to training needs. Quality assurance is secured through the intensive screening process and through on-going review. Review mechanisms include a Peer Review Board and an ad hoc group set up to deal with complaints. This group includes three Peer Supporters chosen at random, the Program Coordinator, and a representative of the Director's office.

Peer Support began its "employee-friendly" branding with the development of a program logo designed by a bus operator, and continues today with posters that feature Polaroids of the newest Peer Supporters, hung strategically in all bulletin board locations across the property's physical space.



Project Profile Summary

After a little over five years, **Let's Talk** and **Peer Support** are identified internally by stakeholders as “ours” – and personnel at all levels have enormous respect for these expressions of OC Transpo's commitment to its people. The programs have worked vigorously to maintain a “home grown” feel – and are not seen as having any significant input or connection to senior management.

The future of **Let's Talk** and **Peer Support** will rely heavily on skills development, most importantly the management skills to recognize, implement and sustain effective practices that foster solid working relationships—relationships focused not only on the operational requirements and service delivery, but also on the individual needs of the employees and managers.

Case Study Profile

This initiative has succeeded because the following essential skills and elements of success are present and given high value:

- **Leadership/Championing:** Senior management and Union leadership are committed to an on-going process of culture change. OC Transpo's experience highlighted the need to constantly invest in two things: 1) a commitment to cultural change that creates a more positive work environment; and 2) enabling resources and time to create and maintain positive “change agents” [**Let's Talk** and **Peer Support**] which promote employee interdependence and employee-management collaboration as essential prerequisites to the favourable resolution of workforce team/esprit/morale issues
- **Additional Senior-Level Commitments:**
 - “Buy-in” from all levels of staff and the Labour structure was secured. Staff at all levels prioritize these programs, making it clear to line managers that employee time devoted to projects of this kind is encouraged
 - Program-supportive financial and human resources are provided
 - Specific investments in training and development have been made in order to increase interpersonal skills – helping people work better in terms of problem-solving while understanding the business aspect as well
- **Staffing:** In order to be most successful, programs of this kind must operate without on-going involvement from senior management. Program management involves delegation to mid-level managers and to line staff. At OC Transpo, one-third of one full-time staff person co-ordinates both “**Let's Talk**” and “**Peer Support**”. Human Resources, Training, and Operations departments provide resources to the program and co-ordinate training efforts
- **Training:** Training for these programs was developed internally, drawing from existing resources including EAP training materials

- **Marketing, Communications, and Promotion:** An investment in program visibility was made at the outset. Program launches, internal posters and flyers, and other mechanisms were developed in order to reach drivers/operators who are on the road as well as staff in administration and in the shops. In order to sustain visibility and interest in the program, regular updates and “refreshes” of promotional programs take place regularly
- **Quality Control:** Consistent internal review is built in to both programs

Proven Benefits

The following benefits of the programs have been solidly substantiated:

- Improved employee morale and, by extension, performance
- More effective employee/management communications
- More proprietary involvement in the business of the organization from all levels
- Workforce awareness of organizational health, facilitating early issues intervention
- The knowledge and attributes of front-line employees have been leveraged for common good

Adaptation Prerequisites

The purpose of presenting this Case Study is to provide industry stakeholders with a “blueprint” for effectively creating internal programs to promote employee health and wellbeing. An Action Plan should consider the following demonstrated prerequisites:

- A significant organization commitment to re-examine and rebuild/re-vitalize organizational culture driven by the knowledge that it will promote employee job satisfaction and retention, and overall organizational health
- Buy-in from senior management, organized labour, and line staff
- Company-wide support for the development of programs that will express the new culture
- Clearly defined objectives and goals
- Capital and human resource investment in training, including remuneration for line staff involved in both training and program delivery
- Clearly defined policies, procedures and methodology
- Commitment to on-going investment in the program(s) as organization and human resources needs evolve



Stock Transportation, Kingston - Workforce Planning and Recruitment

Case Study Snapshot

Maximizing recruitment and retention efforts begins—and is driven—by understanding what attracts successful, long-term employees to the position and specifically targeting the key employee market segments in both recruitment campaigns and retention strategies.

Stock Transportation has invested heavily in understanding the essence of the modern school bus driver—demography, psychography, needs and wants, motivators, “hot buttons”—and in doing so, is able to attract and retain candidates in the right quantities and with the appropriate skills.

About Stock

Stock Transportation is Canada’s second largest school bus operator and operates over 3,400 buses in Ontario and Nova Scotia, and covers more than 2000 routes in Ontario, Nova Scotia, New York, Missouri, and Texas.

The Kingston Division consists of 114 student transportation routes in and around the city of Kingston, a largely urban area of just over 110,000 people. There is one full-time driver for each of the routes.

Recruitment History

As with any company in Ontario’s school bus sub-sector, financial pressures at Stock Transportation are severe, but the requirement to ensure that children are safely delivered to and from school remains.

The combination of low wages and schedules that are part-time and seasonal poses challenges to the number of applicants that the sub-sector can draw from.

While organizations like the Motor Carrier Passenger Council and a number of school bus properties in Canada promote the job as the “full-time part-time alternative,” many people see the job of school bus driver as not sustainable.

For many of those who decide to become school bus drivers, changing financial and family situations do not always lend themselves to the position. Stock’s challenge, and indeed that of the entire sub-sector, is to overcome these barriers and sustain recruitment and retention levels so as to continue to be able to provide reliable, high quality service to their clients.

This process begins with constant forecasting, carried on through a formal network of people in the industry. Stock conducts regular “summits” in which internal divisions of the company meet to look at best hiring practices, to continue profiling recruiting targets, and to develop new and innovative ways to build the work force.

In Kingston, annual turnover has increased in last two years, challenging the organization to find new ways to attract - and retain - committed school bus drivers. Analysis of the turnover has shown that many drivers moved away from the company because they were looking for full-time work and benefits. Others were attracted by new industry that has opened up in the Kingston area. It was also noted by a number of

drivers leaving that the job of school bus driver has become more and more demanding and challenging.

Stock Kingston's current work force of 134 drivers includes a mix of "people types," including approximately 25% retirees, 25% parents of young children, and a rising number of "stay-at-home" Dads. The balance of the driver workforce includes those involved in farming and other resource industries.

Understanding the Attractors

Stock believes that it is critical to intimately understand the type of person who can be a competent, happy bus driver. The company has looked carefully at the unique characteristics specific to the people attracted to the job, and have found the following commonalities. school bus drivers:

- Enjoy working with public
- Have an affinity for children and youth
- Have a lifestyle that allows for a combination of modest remuneration and job satisfaction
- Are mature (regardless of age) and responsible
- Are motivated by attractors other than money
- Are attracted by the ability to have the bulk or large parts of their days free to pursue other activities, responsibilities, or employment
- Take pride in their job and see value in it beyond the income

Ultimately, as driving a school bus is a part-time job, those whose financial needs outweigh their need or desire for part-time work will leave for full-time opportunities. Stock recognizes this, and the company works with the knowledge that a large majority of drivers see driving school bus as a transient career, one that lasts until there is a financial or family change that makes the hours and pay no longer ideal.

Stock's understanding of these characteristics has led to a number of practices in both recruitment and in creating employment conditions that match the lifestyles and needs of the operators.

Creating a Value-added Work Environment

Based on the proven attractors, Stock recruits potential operators from a route's immediate community, knowing that the opportunity for people to work with and for their neighbours is an important motivator.

Stock allows its operators to take their buses home at night. This approach is built into budgeting and maintenance schedules at Stock in Kingston. This "benefit" provides at least three important advantages:

- Commuting expenses are virtually eliminated, helping to offset the relatively low wages
- Travel time from home to the operator's first pickup is minimized dramatically because operators don't have to commute from home to the garage and back to their route



- For parents who bring their pre-school aged children on bus runs, there is time to affix child safety seats and make other preparations for the run from “home base”

In addition to the benefit of taking buses home, Stock works very hard to provide other benefits beyond the wage to show respect for drivers and to create a sense of community among them, including things like:

- An operator relations program
- Well-appointed operators’ rooms
- Fresh coffee always
- Recognition through informal awards of tough weather conditions
- Monthly Drivers’ Committee meetings to air concerns with managers
- Student Management and other training programs
- Year-end barbecue
- An active Social Club whose events are partially underwritten by the company

Throughout Stock, contact and communications between staff and drivers is considered a high priority. It is expected that managers have a true open door policy, and be available to listen to what drivers have to say. The essence of Stock’s approach is a principle that says “We absolutely and unequivocally value the employee.” and this philosophy translates into the purposeful creation of an environment with a blend of pay, work circumstances, support and involvement that gives employees an acceptable package.

Sustaining the Workforce

Stock maintains a pool of five drivers who are available at all times. In addition, there is a secondary pool of sixteen additional drivers who are on-call to handle short-notice requirements such as sick-day replacements, and an additional eight drivers in a bank of pre-qualified and trained drivers who can be called upon to assume one of the driving positions, as required.

The reason for such a sizeable pool is a reflection of Stock’s understanding of the day-to-day reality of its drivers. With a high percentage of parents with school-aged children in the work force, it is essential to have drivers available who can pick up shifts in order for Stock to accommodate driver absences due to, for instance, sick children. Where this tolerance of absenteeism might be frowned upon in other industries, it is, once again, one of the ways in which Stock keeps its work force loyal and happy.

In order to stay in touch with the human resources need, a Driver Status Report keeps senior management in touch with the work force by spelling out monthly turnover, analyzed in a year on year context.

The organization is continually in “recruitment mode,” advertising through exterior “sandwich board” signs, working with local School Board and neighbourhood Parent Groups, putting signage up in local stores in the smaller towns outside of the Kingston metropolitan area, and word of mouth. Stock has an internal referral network of drivers, who are recompensed when a qualified lead provided by an individual is hired.

Driver Qualification:

Applicants are screened for character and competence through thorough interview processes that include scenario-building, the viewing of videos, and screening questions that give a sense of the candidate’s natural skill set for dealing with children and adolescents.

All successful candidates must have a valid Ontario driver’s licence, a clean Abstract, and a Ministry of Transportation-approved medical must be passed.

Project Profile Summary

Stock’s success stems from a thorough understanding of its primary supply of resources—who is likely to want to become a school bus driver—and the reasons they are likely to stay. This initiative has succeeded because the following essential skills and elements of success are present and given high value:

- **Leadership/Championing:** Stock sees the recruitment and retention of school bus drivers as a key organizational priority, and invests time and resources in the process
- **Structure, Management:** One senior member of Stock’s Operations Department staff has overall responsibility for developing and executing recruitment and retention strategies
- **Staffing and Resources:** Senior staff spends significant time and resources researching and developing the strongest possible intelligence about drivers’ needs, wants, motivation, and satisfaction. In addition, staff members participate in regional and national forums, sharing intelligence, tools, and techniques available from the broader (national) Stock system
- **Operations:** Flexibility as demonstrated in the Driver pool, and in the allocation of buses for personal transportation by drivers
- **Performance Measurement:** While annual turnover has increased slightly in the past two years, this approach has contributed to an annual turnover rate of less than 5% for more than seven years running. Stock is committed to constant data collection, examination of trends, and sharing of this intelligence across the broader Stock “network” in order to stay proactive

Proven Benefits

The following benefits of the program have been solidly substantiated:

- Development and maintenance of a “deep” driver spare pool ensures continuity of operation
- Tolerance of leave, significant social benefits, and the ability to bring school buses home at night are among the key attractors for school bus drivers in this region



Adaptation Prerequisites

The purpose of presenting this Case Study is to provide industry stakeholders with a “blueprint” for more effective driver recruitment and retention. An **Action Plan** should consider the following demonstrated prerequisites:

- Willingness to re-examine corporate culture, traditions, and rules to accommodate the needs of an emerging work force that is non-traditional
- Investment in determining the most likely characteristics of potential recruits and developing marketing and advertising that reaches these people
- A corporate or company-wide attitude that drivers are an immensely valuable part of the organization and its success
- Investment in training that is relevant to the working reality of drivers, offered at times that fit into their lifestyle

Edmonton Transit System - Strategic Approach to Recruitment / Retention

Case Study Snapshot

The City of Edmonton has modernized and reorganized its operations, and ETS’ recruiting process has evolved into a successful model that meets the Department’s staffing needs by ensuring the on-going supply of an adequately skilled/qualified workforce in today’s competitive market.

Edmonton Transit

ETS is a public transit System with a typical daily ridership of 100,000. passengers. It employs over 1,600 people, the majority of whom are transit operators. Its fleet includes over 750 diesel and trolley buses and 26 community buses that cover over 140 routes, a 37-vehicle Light Rail Transit (LRT) system; and a Disabled Adult Transit Service. The System is a branch of the City of Edmonton’s Transportation and Streets Department.

Recruitment History

As is the case throughout much of the motor carrier passenger industry, Edmonton’s urban system has had to adapt recruitment processes to accommodate labour market change. Historically, few staff resources were committed to recruitment – in fact, just one person was responsible for a simple process that consisted of reviewing applications, conducting a 15-minute interview, and making a hiring decision based on that evaluation. In the late 90s, the City introduced shared interdepartmental HR services and three HR Consultants took over responsibility for ETS’ staffing as just one of many portfolios. Plagued by poor record-keeping, weak processes and a lack of focus on recruitment, this system did not meet ETS’ needs.

By this time, the effects of an unfocused approach were beginning to show at ETS. Performance standards were slipping, complaints and confrontations with drivers were increasing as were problems with customer service, and job applications were down. To compound the problem further, the City’s ridership had also changed, and their expectations were rising.

Recognizing that serious problems existed, ETS and the City's HR staff assessed their needs and determined that giving priority to collaboratively modernizing processes and improving data/records management would create a needed framework for better hiring practices.

Today, ETS' recruitment process has evolved into a Corporate Workforce Plan, "a strategic long-term view towards attracting, developing and retaining skills and talent across the organization to ensure the on-going achievement of business objectives". In a market where employer competition for quality job candidates has intensified, ETS is totally committed to being regionally recognized as an "employer of choice."

Workforce Planning

Planning is the responsibility of ETS' Operations Management Team, which dedicates almost a full staff position to forecasting human resources needs. Target numbers are developed by studying both labour market trends and population trends in the Edmonton area, and through careful analysis of local urban growth patterns. The City's urban planning strategies are fed into the process, allowing this assessment of future demands for municipal services to contribute to projections. In addition, careful attention is paid to the identification and monitoring of impending retirements.

Recruitment

In order to help those aspiring to positions with ETS better understand the hiring process and the requirements of specific jobs, the organization has created a transparent and consistent process that eliminates systemic barriers to finding the best candidates. Rather than simply looking for sheer numbers of applicants, ETS focuses on profiling the specific requirements of each position and seeks to attract qualified applicants by communicating as much as possible about the job via the Web.

Job postings are now tailored specifically to the essential applicant skills/characteristics being sought, and messages and images in postings and advertisements are designed to ensure that these realistically reflect what life "on the job" will be like.

The number one recruitment tool for ETS has become the "ETS Career Opportunities" area of the City of Edmonton's web site (www.edmonton.ca). The site, (which includes a integrated link to the MCPCC industry-careers promotional video "*Put Your Career in Gear*"), takes applicants step-by-step through the hiring process to help them understand what qualifications and preparation are expected of them, clearly spelling out the details in simple bullet points like:

- Job Requirements (prerequisites)
- Job Functions
- Challenges
- The Recruitment and Selection Process

For ETS, this form of "pre-screening" encourages the prospect's self-evaluation relative to the prerequisite skills, knowledge and attitudes, before he/she becomes an applicant. As a result, ETS' investment of time and resources in testing and/or interviewing can be optimized.



Edmonton Transit participates in a number of career fairs annually with a booth presence, promotional material, and videos. Internal postings also play an important role, but, despite its “low-tech” nature, word of mouth referral has emerged as the second most important recruitment source. Recruitment strategies and media are constantly reviewed to ensure maximum visibility /appeal to all segments of the diverse regional population.

Evaluation and Testing

Qualified applicants must pass three competency-based tests: a public relations video test, a written comprehension test, and a driving skills video test. Applicants are advised of their test results and those who pass are scheduled for an interview. Applicants that fail may reapply on a posting after a six-month waiting period. The transit bus operator interview is competency-based and designed to assess candidates in the competencies deemed important by Edmonton Transit.

A question and answer-based screening video, developed in Seattle, Washington, asks fifty multiple-choice questions based on video scenarios. The process takes ninety minutes, and tests applicants’ common sense, intuition, instincts, and experience in customer relations, driving, and customer service. “Best Practice” answers are nested within the multiple choices. This tool has become a staple of applicant evaluation, because it is truly reflective of the position.

The location, facilities and group size of administered testing have been consolidated to the point where the process is very efficient, requiring just a handful of administrators and far less time than previous methods. The process, complemented by a slate of standardized tools such as stock participant and administrator guides and PowerPoint presentations, is continually improving.

Successful applicants are interviewed by a three-member panel that assess education, experience, knowledge, skills/abilities, and personal suitability relative to the position to be filled. Selection is based on an interview score of 70% or more, as well as positive references.

Finally, it is important to note that only about 8% of applicants are hired on a permanent basis. In assessing this fairly low hire-to-prospect ratio, Edmonton spokespersons feel that it is a positive reflection on the recruiting, screening, and training programs in place.

Recruit Training

Successful recruits won’t necessarily become successful employees, but ETS works hard to give them every opportunity to do well. The operator-trainee training schedule has been tailored to enhance skills and confidence. The original 24-day training format has been reorganized to provide an initial three weeks of training plus two weeks of work experience, followed by one final week of training. This format allows trainees to return for their final training session with practical experience, which facilitates personalized remedial assistance as needed.

Trainers with whom new employees are most familiar, and with whom they’ve likely built a good relationship, continue to provide support long after formal training has

ended. They, like supervisors and managers, practice an open door policy to encourage better communication at all levels of the organization. As open communication in the workplace is particularly important for new employees, each new recruit is assigned a mentor. Additionally, the ETS performance management program has been refined to include appropriate recognition for achievement, and added support/consideration for employees experiencing personal problems.

Retention

Furthermore, the organization no longer loses employees as in the past. Now, if people leave, it's for personal reasons unrelated to the job. Complaints on all fronts—from employees, managers and passengers—are down. Supervisors are commenting favourably on the quality of their new employees, and there is a sense that many of the new employees of today have the potential skills and commitment to be the Managers of tomorrow.

Project Profile Summary

As one manager stated, “For the first time in five years, ETS is ahead of the curve with respect to staffing. With the staffing process now front-loaded and cycle times compressed, we have provided for ourselves the luxury of choosing when and how to advertise to get the best candidates.”

This initiative has succeeded because the following essential skills and elements of success are present and given high value:

- **Leadership/Championing:** The evolution of ETS' recruitment and retention practices into an effective and efficient model results from a firm commitment to a philosophy of continuous improvement including the allocation of the resources needed to achieve intended results
- **Staffing:** Municipal personnel in a variety of departments including Planning and Human Resources contribute to the ETS workforce-forecasting and recruitment processes. Trainers are committed to effectively and productively integrate new recruits into the ETS workforce
- **Technology:** The ETS pages of the Edmonton City Website are updated continually. Viewer statistics are reviewed regularly as part of a constant analysis of recruitment media effectiveness
- **Communications and Marketing:** ETS continually examines new marketing methods to maximize the exposure/reach and impact/results of employed recruitment media
- **Performance Measurement:** Hiring of bus operators has almost tripled over the past five years (from 50 per year in 2000 to 148 in 2005). It is expected that Edmonton Transit will hire at least 150 drivers per year for the next five years, and that this number will likely increase as the property grows and attrition continues

Proven Benefits

The following benefits of the ETS program have been solidly substantiated:

- Better understanding of market demographics and urban/suburban



development outlook has aided both workforce planning and targeted recruitment strategies

- Improved recruitment efficiency including timeliness of meeting recruitment needs
- Improved quality of new hires
- Creates a supportive environment for new employees which enhances their potential for success and longevity in the industry
- Reduced complaints and better communications, both public and internal
- Reduced turnover and stronger workforce career commitment

Adaptation Prerequisites

The purpose of presenting this Case Study is to provide industry stakeholders with a “blueprint” for effectively developing new recruitment and retention strategies.

An Action Plan should consider the following demonstrated prerequisites:

- Recognition of the urgent need to develop innovative hiring and retention practices in the context of contemporary labour market challenges, and the assumption of full responsibility and accountability for the effectiveness of the recruitment process
- Determination/commitment of the investment (human resources and capital) necessary to accomplish the desired results, including the employment of appropriate media and current technologies, such as Web-based marketing/screening programs
- Clear methodology, including:
 - Identification of specific “success criteria” for each position to facilitate the selection of applicants most likely to succeed and remain with the Company
 - Use of diverse and targeted media strategies, and focused/refined screening and interviewing techniques to attract and identify qualified applicants
 - Development of process efficiencies in the areas of screening, testing, interviewing, and activities/results evaluation to maximize program productivity.
 - Training tailored to the individual needs of candidates
 - Manager/Trainer “open door policies” and employee mentor programs designed to enhance communications, job satisfaction, and career commitment

Atlantic School Bus Procurement Committee - Pooling of Procurement and Purchasing of School Buses

Case Study Snapshot

The objective of the participants was the pooling of resources to enable the collective specifying, procurement and purchasing of school buses for the purposes of reducing costs, improving vehicle and related safety standards, and creating a platform for the betterment of operating standards throughout the Atlantic Provinces. These founding objectives have been realized.

This best practice is an example of the progressive and collaborative projects being pursued under the auspices of the Council of Atlantic Ministers of Education and Training (CAMET). While this Case Study focuses specifically on the involvement of the New Brunswick Departments of Education and Transportation, it is really about all four Atlantic Provinces, and illustrates what can happen when people and organizations make a commitment to working together to produce the best thinking, the best policies, economies of scale, and best practices.

This best practice also demonstrates how a collective brought together to achieve economies of scale can also generate a variety of other highly beneficial outputs.

About the Players

The **Council of Atlantic Premiers** is an organization that brings all four Maritime Premiers together for the benefit of the residents of Atlantic Canada. The organization's objectives include strengthening the economic competitiveness of the region, and improving both the quality of public services, and the cost-effectiveness of delivering public services to Atlantic Canadians.

The **Council of Atlantic Ministers of Education and Training (CAMET)** is composed of the Atlantic Ministers of Education and Training, and was established in April 2004, replacing the Atlantic Provinces Education Foundation (APEF) established in 1994. Member provinces are New Brunswick, Newfoundland and Labrador, Nova Scotia, and Prince Edward Island. The purpose of the Council is to provide the framework for joint undertakings of the four provinces relative to addressing common needs in the areas of public education.

The **Atlantic School Bus Procurement Committee** is composed of a group of technical specialists and administrators from the four Atlantic Provinces. The group produces school bus specifications, prepares and review tenders, and recommends the contracting of work for the procurement of school buses for the region.

The **Province of New Brunswick**: In New Brunswick, a fleet of vehicles are owned and maintained by a central organization under the Department of Transportation. The school buses are operated by the Department of Education. The largest school bus operator in the region, they employ 1,053 unionized drivers, and operate and maintain close to 1,200 school buses. New Brunswick orchestrates the procurement process for the region.



About the Program

Over the past two decades, school bus operators of all sizes have witnessed steep increases in the price of school buses and changes in the manner in which school buses are manufactured and assembled. In addition, Transport Canada, the Canadian Standards Association, and manufacturers have adjusted school bus specifications in order to address safety concerns and stay in step with emerging technologies.

On the recommendation of the Council of Atlantic Premiers and CAMET, the idea of pooling the procurement and purchasing of school buses was initiated in 1992 and the mandate and operating procedures for the Committee were established at that time.

Since then, the Atlantic School Bus Procurement Committee has met regularly to develop specifications that are applicable throughout Atlantic Canada, and to manage the procurement process. The Province of New Brunswick handles the responsibility of issuing tender calls related to the specification on NBON (the province's public sector electronic public tendering system).

The Spec'ing Process

In order to develop appropriate bus specifications, the Atlantic School Bus Procurement Committee has representation from all four Provinces, and a number of key competencies are at the table.

The group includes managers, technical inspectors, Department of Education representatives, fleet managers, and experts in finance. One member is also a key member of the Canadian Standards Association D250 Group—the group that develops national standards for specifications and requirements for school buses all across Canada. His knowledge of the standards, which provide guidance to manufacturers on school bus design and safety features, gives the Committee a significant advantage during the specification development process.

The Committee develops the specification by discussion and agreement, assigning one member the responsibility for making any changes to the document as it is reviewed. After the preliminary meeting, additional changes are made to the document via conference call involving all Committee members. Typically two to three discussion periods are required to finalize the tender documents.

The Procurement Process

Once the Committee has approved the final tender specification document and individual jurisdictions have identified the quantity of buses required, the final tender document is sent to the Province of New Brunswick. The Province takes the lead role in tendering for the goods for the entire Atlantic region under a regional Procurement Agreement.

When tender responses are received, the tender bid information is transferred to a spreadsheet, which is made available for the entire Committee for review. Selection of the successful proponent is based upon the vendor who meets the conditions of the tender document and offers the best economic value for all the Atlantic Provinces. Only one manufacturer will be chosen to supply goods for the entire region.

Each jurisdiction is responsible for determining the final quantity of units to be ordered, identifying options that they would like to see included in their operational units and issuing purchase orders to the manufacturer for their segment of the order. Upon receipt of the order, the manufacturers will establish a date to build a number of prototype buses to the specification of each individual jurisdiction.

Representatives of each jurisdiction visit the chosen manufacturer to review the prototype buses and ensure that they meet the tender specification. The manufacturer makes changes to the production schedule to accommodate any deficiencies encountered in the prototype review process. The manufacturer then advises when the remaining products will be built and delivered to each jurisdiction.

For the 2005-2006 school years the Committee managed the procurement of 259 buses; their largest order to date, with purchases distributed as follows:

- New Brunswick: 99 vehicles
- Nova Scotia: 67 vehicles
- Prince Edward Island: 26 vehicles
- Newfoundland & Labrador: 67 vehicles

According to a Program authority, “We believe this approach is unique in North America. While other services both in Atlantic and other parts of Canada are becoming increasingly privatized, we are still a part of the public sector, and so we’re driven by accountability to the taxpayer as well as by the desire for the safety of our students and our drivers. With 3,000 vehicles or more on the road, we have strong understanding of fleet management, and can apply that to the school bus fleet. But perhaps the most important thing is that we can work directly with the manufacturer, who has our undivided attention because our orders are significant in size.”

Beyond co-operative buying, the process allows the Committee collectively to develop common operating procedures that incorporate the needs of specific jurisdictions. The group can develop common approaches to technical items like lighting packages, and stop arms, and also make recommendations on other procedures including service schedules, training, and bus operation.

This pooled procurement process has meant changes for bus dealers in Atlantic Canada, who now align themselves with the manufacturers. Local companies are still a key part of the purchase, but now they act more like an agent for the manufacturer.



Project Profile Summary

This initiative has succeeded because the following essential skills and elements of success are present and given high value:

- **Leadership/Championing:** The Council of Atlantic Premiers enabled this Committee and Program and has supported this initiative for over a decade as an example of the co-operative and knowledge-transfer philosophies that are the core of this inter-provincial group
- **Structure, Management:** The Atlantic-Provinces-wide Committee combines technical expertise and collective operational knowledge into a sound organizational structure that facilitates decision-making and project execution
- **Staffing:** Since the Committee is composed of existing staff people with knowledge/skills directly related to school bus procurement, no additional staffing is required. The group meets several times a year, with very specific agendas and objectives
- **Guidelines:** Several guidelines drive this process, including pre-existing purchasing and procurement regulations, the CSA D250 School Bus Standard, Transport Canada standards, and provincial safety and Highway Traffic Regulations
- **Quality Control:** Multiple quality control processes are in place, including evaluation by group members through a set feedback cycle, the testing of prototype buses built by manufacturers prior to line assembly of all orders, and inspection of delivered vehicles by applicable jurisdictions
- **Performance Measurement:** The Council of Atlantic Premiers has evaluated the performance of this group, and views it as one of the most successful collective programs in operation in Atlantic Canada. The process has enabled effective cost/benefit leveraging of manufacturers, particularly beneficial for small jurisdictions who realize major savings. A Program authority has commented: “Current unit pricing is similar to what was seen a number of years ago” and “savings that accrue to each government as a result of this process are significant”

Proven Benefits

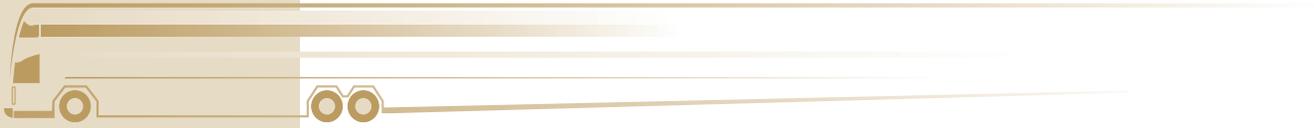
The following benefits of the program have been solidly substantiated:

- Optimizes control of new vehicle purchase costs, enabling participating jurisdictions of any size to realize the advantage of leveraged buying power
- Contributes significantly to uniform vehicle and safety standards within the region
- Effectively employs collective human and other resources of participants for common benefit
- Provides a proven operational framework that can be applied to manage the costs of other selected capital/operating expenses

Adaptation Prerequisites

The purpose of presenting this Case Study is to provide industry stakeholders with a “blueprint” for effectively creating a bulk-purchasing collective. An **Action Plan** should consider the following demonstrated prerequisites:

- A significant capital or service expense common to multiple stakeholders
- Participant commitment to collaborative co-operative consensus
- Green-lighting from senior management
- Clearly defined objectives and standards
- A Champion to lead and energize the process
- An organizational structure facilitating decision-making and project execution
- Clearly defined policies, procedures and methodology
- Thorough knowledge of the needs of end-users (drivers, mechanics, riders, etc.)
- Thorough knowledge of applicable legislation, regulations, and standards
- Qualified specialists as appropriate (specifications, procurement, quality control, contract management, etc.)
- Systems for cost-benefit validation/audit, and project monitoring/management/reporting



Reference List

The attached Reference List is substantially representative rather than totally inclusive of the scope of investigative research conducted to produce this Study. During project development, literally hundreds of Canadian and international Internet sites were audited to access Study-relevant information. In most instances, these Internet sources have been referenced only when quoted or when providing other material incorporated in the body of the Study.

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