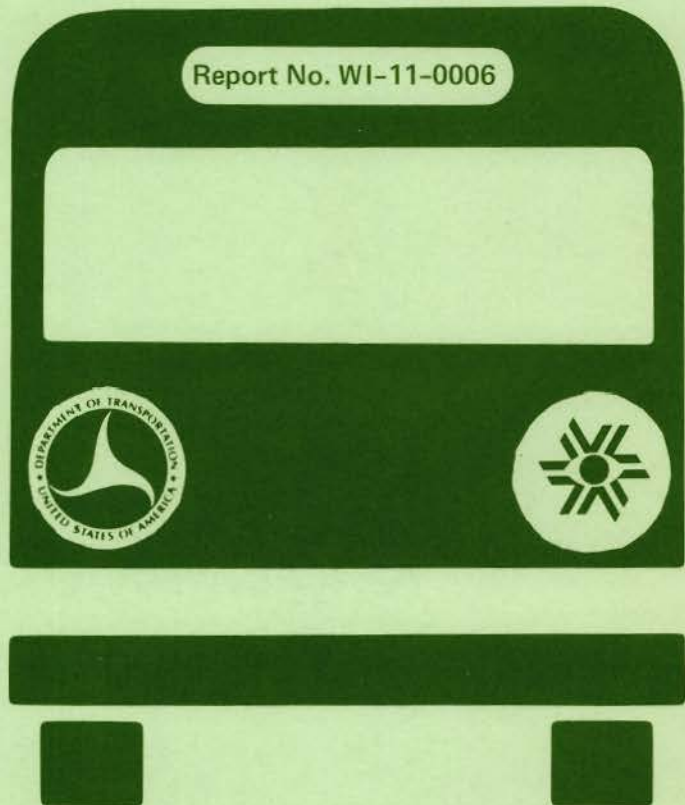


Northeast Labor-Management Conference on Issues In Urban Transit

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Summary Report
September 1979

Report No. WI-11-0006

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Industrial Relations Research Institute
University of Wisconsin-Madison

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Abstract <p>This report summarizes the discussions which took place at the April 18-20, 1979 Labor-Management Conference on Issues in Urban Transit at the Harrison Conference Center, Glen Cove, New York. Approximately 30 union and management municipal transit representatives from primarily the Northeastern region of the U.S. met together to discuss labor relations problems in the industry. The following topics which were discussed at the conference were selected by an advisory committee consisting of union and management representatives: 1) new UMTA programs; 2) paratransit; 3) shop floor labor-management relations; and 4) part-time employment. For each topic a summary is provided for the problems cited by the participants, the recommendations for solving these problems, and specific suggestions for UMTA policy and program development. A copy of the agenda and a list of conference participants are also included.</p>		
Key Words Urban Transit, Labor Relations, Part-Time Employees, Paratransit, UMTA programs		
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A Summary of the
NORTHEAST LABOR-MANAGEMENT CONFERENCE
on
ISSUES IN URBAN TRANSIT

April 18-20, 1979
Harrison Conference Center
Glen Cove, New York

Interim Report to UMTA
Grant # WI-11-0006

Industrial Relations Research Institute
University of Wisconsin
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INTRODUCTION

This report summarizes the discussions which took place at the April 18-20, 1979, Northeastern Conference on Labor Relations in the Urban Mass Transit Industry at the Harrison Conference Center, Glen Cove, New York. The conference was held as a part of an experimental project financed by a grant from UMTA to the University of Wisconsin (UMTA Grant # WI-11-0006).

The views expressed at the conference are those of the participants speaking freely as individuals with a guarantee of anonymity. It goes without saying that these views are not to be taken as official or unofficial views of the American Public Transit Association (APTA), the Amalgamated Transit Union (ATU), the Transport Workers Union (TWU), the United Transportation Union (UTU), or any branch of the Urban Mass Transportation Administration (UMTA). The views expressed, however, are those of a group of knowledgeable union and management leaders in the urban mass transit industry. The names of conference participants are listed on pages 24-28 of this report.

The purposes of the project which led to the conference were as follows: first, to determine whether national union and management leaders thought it worthwhile to arrange a meeting of local union and local management leaders in a nonadversary setting in order to discuss problems of mutual concern; second, assuming an affirmative answer to the first question, to determine the topics which were suitable for discussion at such a meeting and to select individuals to attend the meeting; and third, to obtain from conference participants their recommendations, if any, to UMTA, on ways in which that agency could help labor and management resolve some of the problems which they chose to discuss.

Leaders of APTA and the ATU, TWU and UTU met with representatives of the University of Wisconsin and agreed to cooperate in this project. With

their help, topics for the northeastern conference were agreed upon. The four topics were:

- I. New UMTA Programs
- II. Paratransit
- III. Shop Floor Labor-Management Relations
- IV. Part-Time Employment

With this guidance, University of Wisconsin representatives prepared a draft format for the conference and a list of possible speakers. This format was reviewed with the advisory committee and eventually became the Glen Cove Conference Agenda, included on pages 21 to 23 of this report.

The APTA, ATU, TWU, and UTU advisory committee members furnished the names of the 32 individuals to be invited to the conference. In some instances, general managers or executive directors of systems were invited and, in others, the personnel director or the industrial relations manager was invited. On the union side, invitations were extended for the most part to local union officers. As a result, a quite diverse group was assembled -- representing various levels of authority and different areas of interest.

Comments obtained from participants after the meeting indicated almost unanimously that conferences such as the Glen Cove conference where labor and management representatives could talk informally about problems that bothered them were valuable and commended UMTA for its support of this activity. It was also agreed that the participants should be brought together for two days -- Wednesday afternoon until Friday noon, for example.

The general procedure followed at the conference was to have one or two speakers talk informally for 15 minutes to a half hour to the group as a whole in order to introduce the subject. Then the participants and observers broke into four discussion groups of about ten people each and discussed the problem

for an hour or two. For each topic, each group selected a reporter who subsequently met with the reporters from the three other groups for that same topic in order to consolidate the results of the four separate discussions into one report for consideration by the entire group at the final plenary session of the conference. The same procedure was followed for each of the four topics and therefore resulted in one report for each of the four conference topics being discussed at the final plenary session.

This report summarizes both the individual discussion sessions and final report on each topic. In general, the format followed is to take each of the four problem areas separately, state the dimensions of the problem as seen by the participants, indicate the different points of view expressed by participants, note where there was consensus, and list the recommendations, if any. On some topics, participants were quick to make recommendations; on others, no recommendations were made. The table of contents shows the reader on what pages the discussions and recommendations for each topic are to be found.

This summary was prepared from tapes of the conference sessions which were erased after the summary was prepared. A draft of the summary was furnished to the advisory committee in advance of a post-Glen Cove meeting so that any additional recommendations which they cared to make could be discussed at this meeting and incorporated into the final report to UMTA.

In concluding this introductory section of the conference report, the undersigned project director wishes to express his appreciation to the many people who devoted considerable time and effort to carrying out this project. The conference summaries were written by Stephen Rubinfeld, who extracted the conference highlights from wide ranging discussions and presented them in a clear and concise fashion. Able editorial assistance was provided by Barbara Dennis.

The opening speaker, Wayne Horvitz, director of the U.S. Federal Mediation and Conciliation Service, established just the right atmosphere for a constructive conference. The introductory speakers, who stimulated provocative discussion sessions, were: Lillian Liburdi, associate administrator for Policy, Budget, and Program Development, Urban Mass Transportation Administration; Richard Bradley, executive director, Greater Bridgeport Transit District, Bridgeport, Connecticut; William Leonard, director of Labor Relations, Washington Metropolitan Area Transit Authority, Washington, D.C.; Robert Lieb, professor of Business Administration, Northeastern University, Boston, Massachusetts; and Stephen Rubinfeld, assistant professor of Management and Industrial Relations, Texas Tech University.

The discussion group leaders were: Barbara D. Dennis, managing editor, Industrial Relations Research Institute, University of Wisconsin-Madison; Craig A. Olson, assistant professor, Industrial Relations, Krannert School of Management, Purdue University; Kenneth S. Mericle, assistant professor, Sloan School of Management, Massachusetts Institute of Technology; and Stephen A. Rubinfeld, assistant professor of management, Texas Tech University. They are to be congratulated for ably leading the discussion sections.

The members of the advisory committee, to whom special thanks must be given, were B.R. Strokes, executive vice president and Herbert Scheuer, deputy executive director of APTA; Dan V. Maroney, Jr., president, Walter J. Bierwagen, vice president and director of Public Affairs, and Earle W. Putnam, general counsel of ATU; William Lindner, president of TWU; and Kenneth R. Moore, vice president and director, Bus Department of UTU. Without their help, this conference could not have been held.

Thanks are also due to UMTA representatives, Philip Hughes, director, and Nathaniel C. Jasper, research program manager of the Division of University

Research, who served as contract representative, and Frank E. Enty, project manager, Human Resources Development, who served as technical monitor.

Finally, full credit should be given to the participants who participated fully in the discussions and made the conference lively and worthwhile. To them and to all of the individuals who helped on this project, the principal investigator expresses his gratitude. They made this research project a pleasant one -- and, I hope, from their point of view, a worthwhile one.

James L. Stern

A Summary of the Northeast Labor-Management
Conference on Issues in Urban Transit*

UMTA PROBLEMS

The Problem

The well-being of the urban mass transit industry depends upon the sound development and implementation of UMTA programs but, according to the union and management representatives at the conference, something is amiss in their relationship to the agency. They claim that a number of recent UMTA policy initiatives lacked a sensitivity to the real problems at the operational level and that too often regulations are promulgated without adequate consideration of inputs from industry and labor sources.

The discussion focused on UMTA's relationship with the transit industry and its unions. Union representatives observed that there is a widespread belief that UMTA is management-oriented and a "handmaiden of the industry." Management participants challenged this allegation by noting that there was nothing incestuous about the relationship and by citing numerous problem areas (e.g., funding, Section 13(c) determination, project delays, regulations) that the industry continues to experience in its relationship with UMTA.

The UMTA spokesmen pointed out that the conference participants might not fully appreciate the constraints that grow out of the political environment in which UMTA exists. They argued that UMTA cannot be, and perhaps should not be, an activist for either the industry or the unions; its primary obligation is to carry out congressional mandates.

But the conferees pressed their point, alleging that through inadequate consideration of inputs from those immediately involved in providing transit service, UMTA was not fully discharging its responsibility to implement efficient and effective programs consistent with the intent of enabling legislation. Their point was that the actual parameters of transit programs are not usually specified by enabling legislation, but rather are left to the discretion of UMTA.

*prepared by Stephen Rubenfeld and edited by Barbara Dennis

tion of the administering agency. Therefore, if the parties did not actively pursue their objectives, they would not have a significant impact on the determination of transit policy, and the industry would face further difficulties. Recognizing the complexity of UMTA's environment, the conferees agreed that the transit industry and its unions must make a more vigorous attempt to make their presence felt at the legislative level and should augment current efforts to work with UMTA in planning as well as in the design and regulation of transit programs.

The degree of UMTA involvement in the internal affairs of transit properties was also discussed at length. It was noted that the need to coordinate the wide range of programs and policies had had the effect of increasing UMTA's interest in the operational activities of transit properties. Economic considerations, including inflation, public pressures to curtail government spending and the growth of the public sector, and other budgetary limitations have, in a similar fashion, increased UMTA's concern with efficiency and system productivity.

While recognizing the need for an optimal use of limited financial resources, conference participants were apprehensive about UMTA's intention to expand its program of assessing system performance, resource utilization, and cost data. There was no objection to UMTA's contention that such information would be beneficial in the agency's decision-making process, but the fear was expressed by both union and management representatives that a by-product of this data collection and analysis would be unnecessary and undesirable interference in operating and administrative policy-determination as well as in labor-management relations.

A portion of the session was devoted to examining the philosophy and implementation of various UMTA programs and policies -- paratransit, Section

504 regulations and service to the elderly and handicapped, encouragement of private-enterprise participation in the delivery of transit services, the urban initiatives program, and the role of mass transit in the energy crisis. Most of the discussion was of paratransit and Section 504 regulations.

The role of UMTA in the development of paratransit policy was widely criticized. There was agreement that paratransit services show promise as a component of an integrated transit delivery system, but the consensus was that UMTA had done little to alleviate the range of problems and uncertainties that have inhibited the growth of this mode. (A summary of the discussion of paratransit issues can be found in the following section of the report.)

The proposals for the implementation of Section 504 of the Rehabilitation Act of 1973 were formulated without adequate consideration of the financial, technological, and operational problems they would create, according to the conference participants. They agreed that the 504 requirements raise serious problems for both transit properties and their employees. Specific areas of concern were the requirement for system accessibility, time schedules for compliance, the mandatory retrofitting of existing facilities and equipment, and the financing of program requirements. Some resentment was expressed that UMTA had not taken a stronger stand in the development of Section 504 regulations, once again raising the issue of whether the agency had interpreted general federal policies in a manner consistent with the best interests of the transit industry.

The Recommendations

In addition to the specific recommendations listed below, the participants agreed that the open and generally enthusiastic exchange between the union and management participants and UMTA personnel was in itself a very worthwhile

process. There was consensus that there should be more sessions where industry and labor representatives could meet in a nonadversary setting. There was also agreement that additional opportunities for the exchange of ideas and the discussion of problems with UMTA representatives would be appropriate.

The following are some specific areas of agreement and suggestions for action:

1. As neither labor nor management has been particularly successful in affecting the development and implementation of government transit policy, they need to expand their lobbying activities at both the policy-making level (congressional and legislative committees) and at the agency level in both federal and state governments.

2. Improved communication with UMTA, on formal and informal levels, would be of benefit to the managements, the unions, and the agency -- with the caveat unanimously endorsed by labor representatives that 13(c) questions should not be included. Examples were cited in support of the premise that UMTA personnel may not always be well enough acquainted with transit operating problems.

3. Additional conferences should be arranged where industry and labor representatives can discuss mutual problems. The time for discussion should be expanded by narrowing the range of topics on the agenda.

4. UMTA should place more emphasis on determining the operational and economic implications of the policies and equipment it mandates. At the same time, UMTA should limit its involvement in the day-to-day affairs of individual transit properties (e.g., operating decisions, labor-management relations).

5. Disbursement of Section 5 funds should be handled expeditiously. It was noted that too frequently delays in disbursement necessitate the inconvenience and expense of short-term bank financing.

6. UMTA regulations do not provide adequate flexibility to properties attempting to implement programs best suited to their service area. Some flexibility, as well as the allocation of sufficient funds to permit compliance with newly promulgated regulations or program requirements, would be desirable.

7. More extensive coordination is needed of the range of government programs and regulations dealing with mass transit.

PARATRANSIT

The Problem

While paratransit services are said to have great promise as part of an integrated urban transit system, their potential will not be realized until the practical problems of financing, structure, management, and operations are resolved, according to the conference participants.

They agreed that it would be impossible to define a single best structure for a regional transit system. The optimal system would be an amalgam of both conventional transit and paratransit. The regional transit agency or dominant transit system should play a major role in providing a package of services tailored to the particular needs of the service area. Moreover, such a system must be dynamic and responsive to the changing needs of the community. Much of the discussion in the session was directed at alternative methods of coordinating and controlling complementary transit services.

A number of possible paratransit scenarios were discussed, ranging from one where the transit authority serves as the owner and provider, to another where the authority acts only as broker and coordinator. Although numerous concerns were voiced, there was consensus that existing transit authorities are capable of providing paratransit services because they have the following characteristics and facilities: 24-hour operation, vehicle repair facilities, communications, experienced operators and management personnel, economies of scale, and functioning staffs. Nevertheless, many problems and areas of uncertainty remain to be resolved before transit authorities voluntarily expand their involvement with paratransit. Among these problems are competitive bidding requirements, labor-force protection and compensation, long-term

financing, and the role of paratransit in serving the needs of special groups (e.g., the elderly and the handicapped).

Labor and management representatives concurred that the federal requirement for competitive bidding on paratransit projects is the source of many of the paratransit problems. Some conferees were of the opinion that paratransit decisions based on the lowest bid were often short-sighted and contrary to the objective of providing an integrated and comprehensive package of transit services to the community. As a result, paratransit services are fragmented and are often provided by small-scale operators with limited resources and expertise. Each provider has an objective of optimizing its own performance and does not need to be concerned about functional integration or long-term continuity. Many other conferees were convinced that the "deck is stacked" against established transit systems in the bidding procedure because they face more stringent performance requirements, capital requirements, and labor protections.

Section 13(c) assures that UMTA-funded projects will not adversely affect the working conditions of those employed in mass transit within the project service area. There appears to be a great deal of uncertainty concerning the extent to which the development of paratransit services will compete with or otherwise impinge upon regular route service as well as services presently being provided by proprietary operations. In addition, it is not clear to union and management representatives whether 13(c) guarantees are intended to protect the long-term job entitlement of workers hired to fill positions created by the addition of paratransit services. Concern was expressed that reduced program funding in the future might saddle transit authorities with extraordinary 13(c)-based obligations to paratransit employees.

Other problems to be considered in the development of paratransit options by transit authorities are labor-force configuration and compensation of paratransit operators. There is some debate about whether paratransit functions should be performed by regular bargaining-unit employees or by a separate workforce. Other considerations are whether part-time employees should be used and whether it is appropriate to pay a lower wage to paratransit operators than to regular transit operators. Although in some instances separate coverage has been negotiated for paratransit operators, the majority of the union participants indicated that paratransit operators should be treated in exactly the same manner as other operators. The union position appears to be that load factors and related productivity measures are not proper determinants of wage rates and that employees should not subsidize paratransit operations. Transit authority representatives noted, however, that budgetary limitations and the competitive bidding process necessitate a lower cost structure for paratransit.

An additional area of uncertainty is the extent to which paratransit meets some or all of a system's accessibility requirements for transportation of the elderly and handicapped. The hope was expressed that future drafts or modifications of proposed Section 504 requirements would decrease the extent to which mainstreaming is required and increase the role of demand-responsive services in this area. Any movement in this direction would provide an incentive to expand paratransit services.

A final issue discussed was the long-term funding assurances for transit authorities embarking on paratransit expansion. The concern was expressed that potential liabilities arising from 13(c) requirements, obligations created by labor agreements, and other costs necessitate more extensive financial guarantees and assurance of continuity than are currently available.

The requirement for competitive bidding was seen as particularly troublesome in this regard.

The Recommendations

According to the conferees, there was agreement that paratransit services have great potential as a component of an integrated and comprehensive transit program. However, problems and areas of uncertainty discussed above are inhibiting the development of the paratransit mode. Union and management participants agreed that they should work together at both the local and the national level to resolve differences and attempt to influence government policies.

The specific conclusions and policy recommendations of the conference participants include:

1. The organization and structure of paratransit services should be locally determined. The specific characteristics of the system must be tailored to the needs and resources of the service area. Service to the elderly and handicapped should be the primary paratransit objective.

2. A study of the long-term implications of the competitive bidding process should be undertaken. Concern was expressed that current policies are short-sighted and counterproductive to the goal of providing an integrated and comprehensive transit service.

3. There must be more extensive coordination of existing paratransit programs. Duplication of services, inadequate consideration of program continuity, unacceptable service quality, and inefficiency were cited as areas where improvement might be forthcoming with better coordination and controls. Particular emphasis was placed on the need for better quality control in paratransit operations.

4. The degree to which Section 13(c) labor protections are applicable to paratransit projects should be clarified. For example, to what extent does

liability exist following the loss of an existing paratransit franchise to another provider through the competitive bidding process or reductions in paratransit services due to programmatic changes or reduced funding?

5. The conferees agreed that long-term funding commitments are necessary for transit authority involvement in paratransit programs. Some resentment was expressed that UMTA was not offering sufficient financial incentives for transit authorities to undertake paratransit projects. It was also noted that, even where near-term funding was available, uncertainty about future funding limited program development or expansion. It was suggested that the parties attempt to obtain changes in federal funding policies.

6. Union representatives strongly urged that if paratransit operations are added to existing transit properties, the rights of all system employees should be protected and wide disparities in wages and benefits between paratransit and regular operators should be avoided.

SHOP-FLOOR LABOR RELATIONS

The Problem

Escalating frustrations among supervisors and shop stewards in administering contracts were reported during the discussion of the nature and severity of problems encountered on a day-to-day basis in the labor-management relationship. The focus was on the origin of these difficulties and suggestions for improving the climate for contract administration.

There was widespread agreement that the quality of shop-floor relationships is of primary importance to both the organization and its employees, and the need to foster an environment which encourages problem-solving rather than crisis management was emphasized. In addition, the importance of resolving disputes quickly before they grew and gave rise to other problems was stressed.

A number of factors were highlighted as contributing to the development of a favorable shop-floor environment: a carefully structured collective bargaining agreement, comprehensive and well-coordinated personnel policies, a progressive discipline program, and the proper selection and training of supervisory personnel and union representatives. Most of the discussion was devoted to defining the roles of the supervisor and the union steward in such a shop-floor environment.

Problems associated with workforce supervision are multifaceted and grow out of the characteristics of the job itself, inadequacies of the selection and training procedures, and organizational and societal changes. One issue that surfaced quickly was that the nature of the supervisor's job has become more complex in recent years. It was noted that the supervisor cannot rely as much as previously on his subordinates' deferring to his position or

authority. In a similar fashion, changing values and worker expectations introduce new problems to workforce administration. Finally, the pervasiveness of government regulation of personnel decisions has increased both complexities and potential liabilities associated with decision-making. As a result of these evolutionary changes, managerial skills and interpersonal competence have become increasingly significant elements of the supervisor's job.

Many participants pointed to a need for better selection procedures for supervisors. Where hiring or promotion decisions do not accurately predict the actual range of supervisory skills, the likelihood of a high quality shop-floor relationship is accordingly diminished. Particular emphasis was placed on the need to screen prospective supervisors for interpersonal competencies.

It was also noted that there is inadequate recognition of the pressures and problems of adjustment that the newly appointed supervisor must face. Training can play a considerable role in assisting supervisors to learn basic skills and to adjust to job stresses, but typical programs provide insufficient instruction on how to cope with the increasing complexity of the supervisor's job. The programs frequently are not based on a needs analysis and are deficient in training for interpersonal competencies. Additional criticisms were that the trainer is often ill-prepared or unqualified to give behavioral instruction, that reliance on in-house training has led to stagnation of ideas, and that the low priority attached to training creates an atmosphere that is not conducive to learning.

Finally, the parties indicated that inadequate funding was a major barrier to the further development of training activities. Although it was agreed that the decision to limit training without a complete assessment of

the costs and benefits of such program expenditures is short-sighted, transit authorities are not likely to undertake major initiatives in training without special or allocated funding.

Many of the same problems and issues described above are applicable to the functions of the union representative or steward. While the selection of an individual to fill this position is a political process, discussion indicated that there has been some change in the type of person selected for the office. For example, the likelihood has diminished that the prospective steward is a high seniority employee and that he or she has been "schooled" by participation on committees or in other union activities. The opinion was offered that the environment within the union is more political today than it once was, and that perhaps the increasing influence of interest groups has led stewards to expand the scope of their activities.

Although the political underpinning of the steward's position is not an excuse for irresponsible performance, it was suggested that inadequate attention is given to the training and adjustment phase of a steward's tenure. Union training programs tend to be well established, but, as is the case with supervisory training, they may not place adequate emphasis on interpersonal skills and problem-solving.

Both labor and management representatives identified the changing nature of the transit workforce as being a considerable problem to the supervisor and the steward. Complaints were voiced that employees have poor work habits and unrealistic expectations of what to expect in an employment relationship, possess poor attitudes toward authority relationships, and make unfair demands on their union representatives. While training of employees might alleviate some of these problems, most are deeply rooted in changing societal values.

The majority of the conferees believe that the burden is on the organizations to respond to dynamic conditions. The shop-floor administration (supervisors and union representatives) must be trained to be flexible and to adapt to changing employee expectations and behavior.

Several specific problem areas were discussed in detail, including equal employment opportunity, absenteeism, and grievance handling. Equal employment issues were described as a growing problem by a substantial number of conference participants. Aside from alleged abuse of complaint procedures by individual workers, there was also criticism that fear of employee activism or legal action often leads to inconsistent and inappropriate management responses. In addition, there was concern that activities of the civil rights office and the personnel office at some properties were inadequately coordinated.

Absenteeism was identified as another issue that is creating serious difficulties for transit properties, and it was agreed that research was needed to identify appropriate methods for reducing it. At the same time it was recognized that because there are costs associated with turnover and that the discharge of marginal employees is not always feasible, a greater emphasis on rehabilitating individuals with poor work records is necessary.

Finally, the conferees considered the question of whether the magnitude or nature of shop-floor problems is in any way influenced by the public-sector status of most transit properties. A number of possible explanations were advanced: the multilateral nature of public-sector labor relations, high public visibility, the method of funding, and changes in the organizational structure. However, the labor and management spokespersons concluded that changing societal values, system expansion, and the changed composition of the transit workforce offered better explanations for increasing shop-floor

problems than does the transition to public ownership.

The Recommendations

Labor and management representatives agreed that efforts must be made to improve shop-floor labor relations. The parties stressed the importance of a favorable climate for contract administration. The attitudes of workers and problem-solving skills of union representatives and management personnel were defined as the primary determinants of the quality of the labor-management relationship.

A number of suggestions were offered for reducing the frequency and severity of problems encountered in contract administration:

1. More extensive training is needed for supervisors and other management personnel as well as for union representatives. The thrust of such programs should be the development of interpersonal, decision-making, and grievance-handling skills. Programs should be on-going to insure the maintenance and further development of such skills.

2. To limit developmental costs and assure that an appropriate level and scope of materials are included in programs, some effort should be made to involve UMTA or other agencies in conducting a needs survey and developing packaged training programs.

3. Training programs should be upgraded. Local property trainers with limited qualifications should be assisted by experimental and well trained academicians or other individuals not associated with the local property. This would also encourage the introduction of new ideas and training methodologies. In some cases, training courses or programs offered by local colleges or community colleges might be appropriate substitutes or supplements to programs run by the transit system.

4. More extensive use should be made of informal meetings between union and management representatives to explore mutual problems. Discussions of contract changes and their implications held immediately following contract negotiations might be particularly beneficial.

5. The problem of absenteeism should be investigated in a research program funded by UMTA. Information is needed about the severity of the problem and program alternatives.

6. There must be a better integration of civil rights complaint handling and grievance administration within the property. The belief was expressed that too often contractual requirements and managerial decisions are undercut by determinations made by the property's equal employment officer. More regular consultation might provide for better decision-making and fewer long-term difficulties.

PART-TIME EMPLOYEES

The Problem

The use of part-time employees by transit systems was the most controversial topic on the conference program and evoked emotional responses from the conferees, particularly the union representatives. It is an issue that has political implications both within the community, where it commands high public visibility, and within the union. Furthermore, it is an area where no hard comparative cost data are yet available and where limited experience in the use of part-time employees by major transit properties makes any conclusions tentative.

The concept of part-time employees is not new to the transit industry. Part-time workers were employed fairly extensively during and immediately following World War II, and they continue to be used in school-bus operations and other specialized components of the industry. Recently, the idea of employing part-time operators has been given new life by contract changes at several major transit properties. These provisions, arrived at by negotiations in some instances and through arbitration awards in others, have resulted in extensive debate over the pros and cons of using part-time employees to supplement the regular transit workforce.

The resurgence of interest in part-time employees was said to be politically inspired -- a by-product of an increasing emphasis on productivity and system efficiency. The explanation offered by management representatives was directed specifically to scheduling problems during peak service periods and increasing budgetary pressures. They noted that most of the growth in transit ridership in recent years has been during peak travel periods and that the hiring of regular employees to drive newly created runs during peak hours

usually means guaranteeing these operators an eight-hour day or a full week of work. Such guarantees and other contract provisions have made the expansion of service prohibitively expensive, according to management spokespersons.

While, in theory, the use of part-time employees should enhance scheduling flexibility and thus result in cost savings, there was concern among union representatives, and some management personnel as well, that use of part-time operators may not be quite the panacea that some people claim. According to the critics, major transit properties have not had enough actual experience with part-time employees to know whether projected savings will be realized or if they will be eroded by contractual restrictions and unforeseen costs associated with the introduction and training of part-timers.

Union representatives had a number of specific objections. They considered the introduction of part-time operators a threat to the jobs of union members and, at the very least, to the earnings of their members if and when they lost opportunities for extra trippers and other overtime. Just as serious, in their view, is the threat to the integrity of the union itself. They claimed that the introduction of part-time employees into the workforce could be used by management as a technique to weaken or "break" the union, and, even where these employees were union members, their presence could create internal strife and dilute the strength of the bargaining unit.

More broadly, the union representatives also expressed concern about the effect the introduction of part-timers might have on the quality of service and safety record of a transit system, suggesting that problems might result from the lower skill level of part-time drivers, their lack of familiarity with transit operations, and their lack of dedication to the industry. Where individuals view transit employment as an obligation secondary to a primary

job, absenteeism, tardiness, and turnover might create major and costly scheduling difficulties for the properties. One management participant recounted his experience with a number of postal employees who were employed by his company as part-time operators. During the Christmas season, when growing mail volume necessitated overtime work at their primary jobs, these employees simply didn't show up, and he was left with no extra peak-period drivers for several weeks.

Recommendations

While the union participants were more vocal in presenting their views on the part-time issue, both labor and management representatives identified many areas of uncertainty as to the effects of using part-time employees. All of them recognized that such a decision requires consideration of many complex elements, not the least of which is a complete accounting of all associated costs and benefits, both short- and long-term.

Other conclusions and recommendations suggested were:

1. The use of part-time employees should be decided on a case-by-case basis. Differences among properties make generalized conclusions inappropriate. A substantial proportion of the conference participants believe that this issue is best resolved through the give-and-take of collective bargaining.

2. Most union representatives oppose the introduction of part-time employees on transit properties.

3. More information on the implications of using part-time transit employees is needed, and it was suggested that the experience of transit properties as well as companies in other industries should be investigated. However, a number of conference participants opposed any further research in this area.

4. One part-time employment program that seemed less controversial was

phased retirement, with existing employees being offered the opportunity to shift to part-time status late in their careers or following retirement. This arrangement might be attractive to employees and would also minimize training costs. It was noted, however, that such a program would require modification of pension provisions in some cases.

5. It was agreed that any cost savings associated with the use of part-timers would depend upon such factors as the specific contractual limitations on the use of part-time employees, the extent of any wage and benefit differential permitted for part-time employees, the degree to which penalty pay (guarantees and overtime) was reduced, the costs of selecting and training part-time employees, the turnover and absenteeism rate of part-time employees and staffing difficulties that both turnover and absenteeism would cause, and the quid pro quo involved in the negotiation of a provision permitting the addition of part-time employees.

AGENDA

Labor Relations in Urban Transit Conference

April 18-20, 1979

Harrison Conference Center, Glen Cove, New York

Wednesday, April 18

2:00 - 5:15 PM Registration
5:15 - 6:00 PM Reception
6:00 - 7:30 PM Dinner
7:30 - 9:00 PM Introduction

James L. Stern, Professor of Economics
and Industrial Relations
Industrial Relations Research Institute
University of Wisconsin - Madison

Keynote Speaker

Wayne Horvitz, Director
Federal Mediation and Conciliation Service (FMCS)

Thursday, April 19

7:30 - 8:30 AM Breakfast
8:30 - 9:00 AM Introductory speaker on the new programs of UMTA

Lillian Liburdi, Associate Administrator
for Policy, Budget, and Program
Development
Urban Mass Transportation Administration (UMTA)

9:00 - 10:05 AM Discussion sessions

What is the appropriate role for the
federal government in defining local
transit programs?

What are the new programs and policies
of UMTA?

What are the implications of these programs and policies on labor-management relations?

Are there particular problems of implementation or coordination?

10:05 - 10:15 AM

Break

10:15 - 10:45 AM

Introductory speaker on paratransit:

Thomas Brigham
Operations Manager
Greater Bridgeport Transit District
Bridgeport, Connecticut

10:45 - 11:50 AM

Discussion sessions

What are the manpower problems of integrating paratransit into conventional urban transportation systems?

In a number of localities, 13(c) agreements have been used to involve unions in working out problems of integrating paratransit into conventional systems -- is this a sound procedure or is there a better way?

What are the special problems encountered in transporting an elderly and handicapped ridership?

12:00 - 1:30 PM

Lunch

1:30 - 2:00 PM

Introductory speaker on labor-management relations on the shop floor

William Leonard
Director of Labor Relations
Washington Metropolitan Area Transit Author:
Washington, D.C.

2:00 - 3:00 PM

Discussion sessions

What are the nature and severity of day-to-day problems encountered by supervisors and union representatives?

What is the origin of such problems?

Are there steps which might be taken to improve the quality of the labor-management relationship?

3:00 - 3:15 PM	Break
3:15 - 3:45 PM	Introductory speaker on the use of part-time employees on transit properties Robert Lieb, Professor of Business Administration Northeastern University Boston, Massachusetts
3:45 - 5:00 PM	Discussion sessions To what extent have part-time employees been used in the transit industry? What are the advantages and disadvantages of a staffing policy which includes part-time employees? Will recent agreements in Seattle and other cities set a pattern for the use of part-time transit employees?
5:30 - 6:30 PM	Hospitality hour
6:30 - 8:00 PM	Dinner
<u>Friday, April 20</u>	
7:30 - 8:45 AM	Breakfast
8:45 - 9:00 AM	Introduction to final discussion sessions Stephen Rubenfeld, Assistant Professor of Management and Industrial Relations Texas Tech University
9:00 - 10:15 AM	Discussion sessions to formulate summaries and recommendations
10:15 - 10:30 AM	Break
10:30 - 11:45 AM	Final plenary session for workshops' recommendations
11:45 - 1:00 PM	Lunch (optional)

Conference Participants

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