



(Board Copy)
Washington Metropolitan Area Transit Authority
**METRO ELECTRONIC ACTION
DOCUMENT**

IDENTIFICATION			
MEAD ID:	99587	ACTION:	Initiate & Award
AWARD VALUE:	(Not yet awarded)	CONTRACT: (Proposed)	
FUND SOURCES: (View)		CONTRACTOR:	
LAST MODIFIED:	06/29/2006		

DESCRIPTION	
SUBJECT:	Fiscal 2007 Training Procurements
PURPOSE:	To request that the Budget Committee recommend and that the Board of Directors approve the initiation and award of all procurements, not previously approved, associated with Fiscal 2007 programmed training and development activity.

ORIGINATION			
INITIATOR		DEPARTMENTAL APPROVAL	
RICHARD PLANTE on 06/19/2006		Not Approved Yet	
PHONE:	202-962-1075	OFFICE:	COUN
		DEPT:	Independent Offices

COORDINATION (ROUTING)		
OFFICE	NAME	ACTION/DATE
COUN (5310)	PLANTE, RICHARD	Approved 06/22/2006
PRMT (7410)	JACKSON, LUCY	Approved 06/22/2006
COOB (3211)	REQUA, JOHN	Approved 06/23/2006
(8110)	BURFIELD, JAMES	Approved 06/23/2006
(1711)	GOODINE, FRED	Approved 06/28/2006
(3311)	FEIL, STEVE	Approved 06/23/2006
CONS (4210)	HAGGINS, JAMES	Approved 06/28/2006
OPAS (3161)	HUGHES, JAMES	Approved 06/28/2006
CFO1 (2110)	WOODRUFF, HARRY	Approved 06/29/2006
COUN (1410)	O'KEEFFE, CAROL	Approved 06/29/2006
(1120)	MONEME, EMEKA	Approved 07/06/2006

FINAL APPROVALS	
OFFICE	NAME/ACTION
SAFE	Approved for by FRED GOODINE on 06/28/2006
OPER_CMTE	Approved for OPAS by JAMES HUGHES on 06/28/2006
PLN_DEV_CMTE	Approved for CONS by JAMES HAGGINS on 06/28/2006
HR_CMTE	Approved for AGMW by BRENDER GREGORY on 06/29/2006
BUDGET_CMTE	Approved for CFO1 by HARRY WOODRUFF on 06/29/2006
JOINT_DEV	Approved for by EMEKA MONEME on 07/06/2006
GM	Approved for GMGR by GMGR CEO on 07/06/2006
BOARD	BOARD WMATA (Not Yet Approved)



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NARRATIVE

BACKGROUND: The Authority has programmed employee-training and organizational-development activity for Fiscal Year 2007, to support its service reliability and customer service goals, and to meet certain mandatory training requirements.

The training and development activities requiring procurements are designed (a) to increase the bench strength of the workforce, (b) to increase overall organizational effectiveness, and (c) to reduce time required to complete federal and WMATA mandatory training while increasing available time for managerial, operational, maintenance, and technical training. The categories of the training and development activities requiring procurements are:

- Professional and Technical Skills Development
- Management and Leadership Skills Development
- Core Skills Development and Career Management
- Organizational Analysis and Intervention

Many of the required activities in these categories are small in cost and scope; others consist of ongoing actions that require continued use of the streamlined procurement process approved by the Board on July 29, 1999. Requirements from professional and technical funds will be procured under a combination of the simplified acquisitions process, exercising option years on current contracts, modifications to current contracts, sole source procurements, or as competitively negotiated procurements. Advance approval of all of these procurements is requested in this MEAD which outlines training procurement requirements for Fiscal 2007 which have not previously been approved by the Board.

DISCUSSION: The Department of Workforce Development and Administration (WFDA), Office of Organizational Development (ODEV), will fund and procure programs addressing training and developmental requirements in all four of the above categories. Additionally, ODEV will procure -- but other Authority departments will fund -- programs addressing those departments' specialized management and operating training needs. These include:

- specialized maintenance, operational, and managerial training, funded by the departments of BUS, RAIL, and OPER.
- specialized technical training, professional development training, and professional engineering, project-management certification training funded by BUS, RAIL, OPER, CEPM, CFO, and the offices of ITSV, PRMT and COUN.
- advanced, high-technology, and specialized computer training to support both legacy and new enterprise systems, funded principally by the office of ITSV.

These requirements have been determined through extensive formal needs assessments, discussions with senior management, special requests from departments, and mandates to comply with federal OSHA and FTA regulations. Some requirements will be met through continuing programs, or programs already under development; others will be met by new programs to be developed with approved FY2007 budget funds.

A summary of the categories of training and development activities requiring FY07 procurements follows:

Professional and Technical Skills Development – \$2,878,650.

Professional – There is continuing need for professionally-oriented skill development and performance improvement programs for managers, professionals, and support employees. There is a growing need for highly-focused programs for professionals and managers such as certification programs for professional engineers, construction managers, and elevator/escalator inspection; programs covering contract administration, inventory management for maintenance managers, cost/price analysis, ethics & negotiations; proficiency improvement programs for operations trainers; and continuing legal, financial and accounting education programs.

Technical – Technical training requirements continue to grow as the WMATA workforce changes through retirements and the acquisition of new workers. Fiscal 2007 will require expanded technical, maintenance, computer and engineering-based skills training. Continuing hardware and software support is required for internally-offered technical programs. Specialized support will be required in Fiscal 2007 for the Authority's legacy central training management and reporting system, as well as for the installation of its replacement system, which has been previously authorized.

Greatly increased requirements have been identified by the operating departments for specialized/advanced maintenance and operations skills training in such functions as: maintenance and use of heavy maintenance equipment for rail, bus; hydraulics; electronic controls and signal systems; track-and-way maintenance heavy equipment; installation and management of new Fire & Intrusion Alarm (FIA) equipment throughout the rail system; management & maintenance of power systems and generators; and management of yard security systems.

Increased high-technology training support will be required by ITSV personnel in Fiscal 2007 to ensure the smooth operation and maintenance of the infrastructure of the recently installed enterprise business systems. Additionally, further training will be required for users of these systems as well.

Training in computer-based-training (CBT) technology will continue to support the projected large scope of employee training planned for development in this mode. CBT will allow operating and maintenance personnel to do more technical training in their specialty areas.

Routine information-technology-related employee training must also continue on personal-computer-based standard business software.

Regular upgrades to both new enterprise and legacy business systems; the interface of legacy training system with enterprise systems, and the use of the replacement PeopleSoft training system will continue to require specialized, sophisticated support consultant support.

Managerial and Leadership Skills Development – \$792,100.

During Fiscal 2007, both discretionary and required courses will be available to managers & supervisors to enhance managing/leadership skills such as Decision Making, Problem Solving, Interpersonal Skills, Innovation, Foundations for Supervision, Interviewing Skills, Coaching Skills, Drug & Alcohol Reasonable Suspicion, Workplace Violence Prevention and Management, Diversity Awareness, Sexual Harassment in the Workplace, ADA Employment Issues, specialized ADA Sensitivity course for those directly interacting with customers, and Stellar Customer Service. Recent, significant new hiring and promotion activity has created a need for more employees to attend these programs.

To retain and encourage high performers, the organization has established a two-level Succession Planning Program which provides opportunities to increase one's skills and prepare for leadership opportunities at the senior management and the superintendent levels. A related program prepares transit police officers for Deputy Chief and Chief position.

Specialized external leadership/management programs offered through university-level institutions or through qualified professional management education organizations will continue to be required

to support the Succession Planning Program or to meet specific development needs of experienced operations, maintenance, and support-function managers.

Core Skills Development and Career Management – \$282,950.

There is a continuing need to assess the core skills and learning capabilities of employees, and to provide guidance for both remedial and new training opportunities in preparation for advancement and career building within the Authority. A core skills assessment center is maintained using qualified instruments from vendors.

Focused programs in reading, comprehension, writing, math, and English as a second language are made available in-house or through local colleges or other accredited institutions for employees who need to increase basic skills prior to learning new competencies, or who seek to meet basic skill requirements to qualify for the WMATA Management Certification Program.

For those with strong basic skills, more sophisticated oral and written communication training, and career management skill training are made available with vendor assistance.

Additionally, in Fiscal 2007 RAIL/TSSM will target maintenance personnel for a major upgrade in technical, business, and report-writing capabilities through a specially WMATA-tailored vendor instruction program.

Organizational Analysis and Intervention – \$175,000.

There are on-going needs identified by various offices to provide organizational analyses and intervention assistance to increase workflow effectiveness, improve work processes, enhance manager-subordinate effectiveness, enhance co-worker/team effectiveness, and build effective organization structures. Vendor assistance is appropriate at times to address some of these needs. Occasionally there is a need for more in-depth, external third-party assessments and evaluations within work groups to build understanding of complex work processes, resolve conflict that impedes work output or quality, or to restructure.

During Fiscal 2007 assistance will be required in the training of internal facilitators who will help address future organizational effectiveness issues. By building a greater depth of in-house facilitation capability, WMATA will broaden its internal intervention capabilities without increasing the use of outside vendors.

Some external facilitation support may also be required for employee teams charged with addressing and resolving cross-functional organizational issues (the High-Visibility Project-Team methodology that the Authority has been employing for the last four years), until sufficient internal facilitation support is built.

IMPACT ON FUNDING:

Budget: Fiscal Year 2007 Operating & Capitalized Budgets. Departments of WFDA, BUS, RAIL, OPER, CEPM, SARP, CFO, Offices of COUN, ITSV.

Line Item: Services (Professional and Technical)

Accounts: Employee Training and Development; Computer Services Consultants

This Action: \$ 4,128,700

Operating Budget: \$ 3,466,900

Capitalized Budget: \$ 661,800

Remarks: The estimated total cost of all actions is \$4,128,700. Initiation/award of any actions for Fiscal Year 2008 funding is subject to Board approval of the budget for that year and the availability of funds.

ALTERNATIVES: The alternative to this action is to seek separate approval for each transaction over \$50,000 in the Fiscal 2007 programmed training activity.

PRIOR APPROVALS: None

AFFIRMATIVE ACTION REQUIREMENTS: Each procurement made under the authority approved by this action will be evaluated according to the following requirements:

EEO Requirements: Contractors will be required to comply with Executive Order 11246, Revised Order #4.

D.B.E. Requirements: DBE participation is encouraged and, pursuant to the race-neutral aspect of the Authority's DBE program, the DBE goal is anticipated to be 10%.

RECOMMENDATION: That the Budget Committee recommend and the Board of Directors approve the initiation and award of all procurements, not previously approved, associated with Fiscal 2007 programmed training and development activity, in a total amount not-to-exceed of \$4,128,700, subject to the availability of funds in the approved Fiscal Year 2007 budget..