

Business Plan
Southern California Regional Transit
Training Consortium

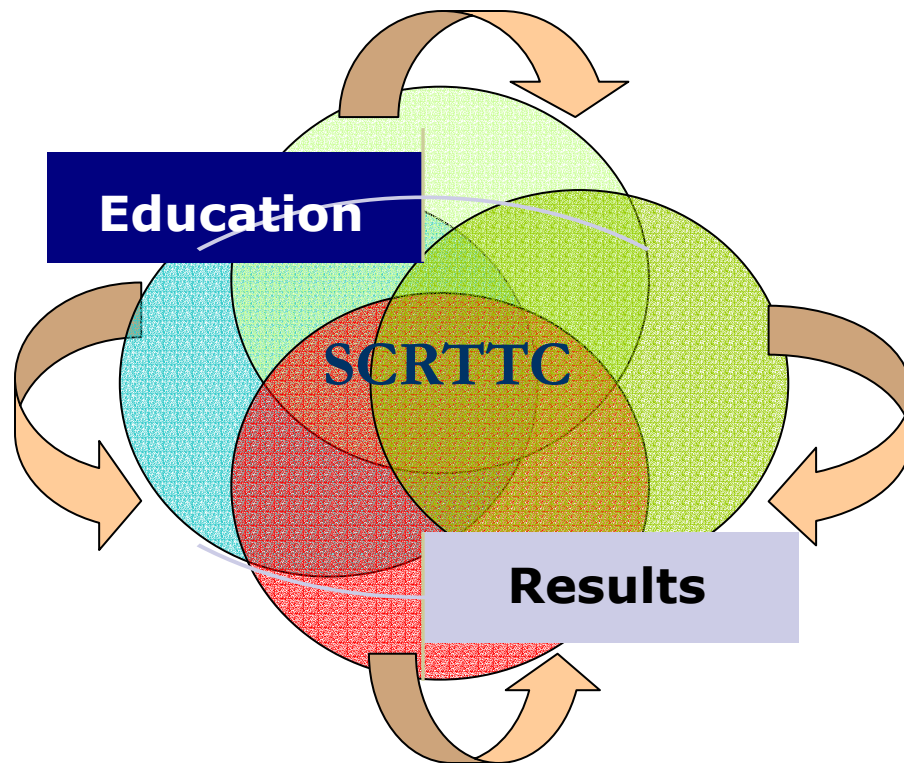


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I. Executive Summary

The ***Southern California Regional Transportation Training Consortium (SCRTTC)*** is comprised of public transportation agencies and college members located in Southern California. The Consortium is currently under application and is seeking legal status as a "not for profit" 501(c) 3 organization, and is subject to the California Nonprofit Corporation laws and regulations.

The specific purpose of the Southern California Regional Transit Training Consortium is to develop, coordinate, deliver, and transmit maintenance training information, education and related resources for the improvement of the transit workforce in Southern California.

The business and affairs of the SCRTTC shall be managed by or under the direction of the Board of Directors and officers of the organization elected by the members. The Board may delegate the management of the activities of the SCRTTC to any person or persons, a management company, or a committee, provided that the activities and affairs of the SCRTTC shall be exercised under the ultimate direction of the Board of Directors. The Board of Directors will consist of (10) members including five transit members, and five college members, initially appointed and approved by the membership. The membership of the first board will serve a one-year term. Subsequent Board membership shall be governed by the organizations bylaws.

The SCRTTC will operate under a set of By-Laws, to be approved by the Board of Directors, and recorded with the office of the California Attorney General.

II. Background

Mission Statement:

The **Southern California Regional Transit Training Consortium** will provide a resource network comprised of public and private organizations focused on the development of the regions transit industry's workforce, and to assure the workforce is knowledgeable of ITS standards, practices, and procedures.

Consortium Goals and Objectives:

- ✓ Develop industry driven, competency based curriculum that meets present and future needs
- ✓ Develop partnerships with transit systems, colleges and educational institutions
- ✓ Provide immediate use of the SCRTTC network and shared information
- ✓ Provide a reliable source of technical and regulatory information
- ✓ Optimize Training Resources
- ✓ Develop State of the Art Training Facilities and Mobile Training Labs
- ✓ Provide distance learning and Internet based learning systems
- ✓ Establish industry-wide recognition and develop business relationships that lead to mutual support and assistance
- ✓ Develop Mentoring programs that enhance promotional opportunities
- ✓ Expand the SCRTTC model nationally
- ✓ Promote and market Transit Industry related careers and education to the general public

Consortium Philosophy:

The SCR TTC will operate as a consortium between the regional transit agencies, interested educational institutions, government agencies, related private sector partners, and the represented employees of the affiliated transit agencies. The overriding philosophy of the consortium is to provide an education and training process that will enhance the ability of the transit employees and the transit agencies to provide more efficient and safer public transit service utilizing "state of the art" technologies and systems.

Legal form of ownership:

The consortium will function as a 501 (c) 3 corporation, and will be self funded with a variety of funding sources including: Membership Fee's; Course Fee's; Grants and Endowments; and In-Kind Services.

The consortium will operate as a California Nonprofit Corporation and adhere to the appropriate laws and regulations.

The By-Laws will govern the day to day operation of the consortium.

History of Organization

In early 2003, a group of Southern California transit agencies, lead by Long Beach Transit, came together to discuss a process to improve the training programs offered to transit agency employees. In particular, this ad-hoc group initially focused on required skills training of transit agency mechanics, and the need for the development of standard work practices and work standards. It was felt that the new technologies being introduced into public transit, as well as the need to operate transit systems more cost effectively, necessitated a need to provide an up to date training program offered in a cost effective manner.

A preliminary study and discussion of available training programs was discussed. In the opinion of the ad-hoc group each of the existing programs had its advantages and disadvantages. It was concluded by the ad-hoc group that existing programs were not structured to provide the training required, or they were not cost effective in either time or money. The following alternative training programs were reviewed:

Method/ Criteria	Educational Content	Delivery Process	Domain Knowledge	Cost Effective
Federal & Association Programs ¹	Good – limited integration of content	Decentralized	Excellent	Travel & out of office time excessive
University Programs	Good	Classroom oriented	Limited	Requires travel to college facilities; can be done on site
Vendor Training	Limited to specific product or system sold	On site - good	Limited to specific product or system sold	Usually limited in time and scope not an integrated program
Consortium	Will be specific to consortium and will be a fully integrated program	Training will be regional and centralized for agencies involved	Excellent and will be specific to technologies and systems being implemented at the agencies involved	Shared cost for consortium members will reduce cost to each agency involved.

With this analysis completed, and opinions rendered, the ad-hoc group decided to formalize its structure for the purposes of identifying the type of training program required to meet the needs of the transit properties in the Southern California area.

The ad-hoc group initially formalized its structure by organizing into three committees:

- Planning Committee,
- Organization Committee, and
- Legislative Committee

The purpose of the committees was to perform additional study regarding the feasibility of operating as a consortium of members to meet the needs of its members. The Purpose, Mission and short term Goals were identified and agreed to by all stakeholders. Initially, the planning committee developed a funding plan that included fees for consortium membership. These initial fees have been used to fund further effort required to formalize the

¹ Includes NTI, NHI, APTA & ITSA programs

organizational structure. Currently the formal By-Laws have been completed and application to operate as 501 (c) 3 has been submitted.

In June of 2004 Federal Highway Administration (FHWA), through the ITSA Joint Program Office (JPO), and in co-operation with ITS America awarded a study contract to Long Beach Transit. The purpose of this contract was to continue study of this area, and in particular to perform a needs assessment and gap analysis to identify training needs of public transit agency employees in the Southern California area. The contract has a completion date of December 31, 2004. It is hoped that additional funding from JPO can be available to augment and continue the development of the consortium program

III. Products and Services

The specific purpose of the Southern California Regional Transit Training Consortium is to develop, coordinate, deliver, and transmit maintenance training information, education and related resources for the improvement of the transit workforce in Southern California.

The consortium will meet this purpose by providing training programs and courses designed to meet the needs of the transit agencies and the served public in Southern California. These courses and programs will be developed based on a needs assessment of the agencies involved and the identification of training gaps based on a "gap analysis".

Part of the "gap analysis" is to research and catalog training courses available to the associated agencies. An inventory of existing training programs and courses currently being offered by the transit agencies is attached. This inventory, along with the inventory of the current courses offered by the colleges is included in the gap and needs assessment analysis. (Attachment 2) In addition, courses available through NTI, NHI, APTA, and ITSA are also inclusive of available curricula. The objective of the needs assessment and gap analysis is to identify specific additional educational needs not being met by current educational offerings.

The consortium will co-ordinate with local associated community colleges to develop an integrated training program that will utilize existing educational curricula and programs whenever possible. This program will be constructed with the recognition of specific transit operating characteristics in the Southern California region. It is recognized that a geographic region has operating characteristics that require unique training courses and programs. One of the major drivers for the formation of the consortium was the recognition that there were no programs in existence that offered an integrated training program designed for a specific geographic location.

Wherever possible, college credit will be awarded to consortium students to further their individual professional development. An inventory of the courses available from the associated community colleges is contained in Appendix C.

The consortium will identify needed educational programs to fill in for gaps identified in existing programs, and will work with the associated community colleges to develop the course curriculum and content. Through the use of in-kind services from the associated colleges, courses and programs will be developed to meet identified training and educational needs.

In addition, the consortium will utilize the courses developed by the National Transit Institute, and the National Highway Institute as much as possible to augment any identified education and training needs.

The consortium also has a working agreement with the Consortium for Intelligent Transportation Systems Training and Education (CITE). This agreement permits SCRTTC to utilize curriculum and courses developed by CITE and its affiliated members. The purpose of CITE is to create an integrated advanced transportation training and education program. The program, based on a consortium of universities, is open to anyone pursuing a career in transportation services. The curriculum provided by CITE may include graduate and undergraduate level courses, as well as skill-based training and technology transfer courses. By working with CITE, the SCRTTC is helping CITE facilitate its networking and communication responsibilities with universities and other CITE members. The SCRTTC agreement with CITE includes a fee for the course material provided, and provides the ability of SCRTTC to deliver some courses and course materials in a distance based delivery format, using the servers and WEB-CT provided by CITE. This method of delivery can be regionalized, and will provide an infrastructure for a cost effective delivery program.

In principle, the SCRTTC, through its Board of Directors, committee structure, and affiliated partnerships, will identify, develop, co-ordinate, and deliver an educational program to upgrade the Southern California transit associated industry workforce. The program that the SCRTTC will deliver is designed to improve employee skills competencies, reduce employee turnover, and promote greater economic development in the Southern California region by improving the delivery of public transit services. The SCRTTC is the only training consortium organized to develop and deliver training programs specifically dedicated to the transit industry, and dedicated to the implementation of ITS technologies to enhance the use of public transit.

More importantly, the consortium’s development of this new “Learning Model” can be exported to other regions of the United States to foster the development of the U.S. Department of Transportation “Professional Capacity Building” program.

In principle, the consortium will function as a repository and promoter of resources and information valuable to transit authorities and individuals looking to develop a Transit Industry related career.

Educational Program Plan

Development of the Educational Program Plan will commence upon completion of the needs assessment and gap analysis. It is recognized that a wealth of curricula and course content is available from many sources. These sources include the associated transit agencies, the colleges affiliated with SCRTTC, CITE, and various government sources including the Intelligent Transportation Society of America (ITSA), National Transit Institute (NTI), and the National Highway Institute (NHI).

The challenge for the SCRTTC is to weave these existing materials together into a cohesive training program with training tracks and career paths to encourage upward mobility of the transit employees. The following is a compilation of the inventory of course materials available:

Source	Number of courses	Content
Associated Colleges	10	GIS Courses; Traffic Signal Controls; and others
CITE	32	Systems Engineering; Project Management; and many others
Transit Agencies	25	Mechanical Repairs; Composites/Welding Body Repair & others
ITSA	Various	ITS Systems and applications including CAD/AVL; EPS
National Highway Institute	Various	ITS Applications and multimodal systems
National Transit Institute	Various	Transit Program Management & others

The wealth of material to develop a comprehensive training program is enormous. The major effort associated with developing a new “Learning Model” is to examine existing curricula, organize the curricula into logical

training tracks, and supplement any materials required based on the needs analysis and gap analysis.

The SCR TTC will begin the development of the Educational Plan in the 1st Quarter of 2005. This will be a multi-phased program designed to accomplish the goals established for the consortium. The outline for this multi-phased program is below:

Phase	Task	Period of Performance
I	Organize curriculum committee and identify career goals, objectives and training tracks	Jan. - June 2005
	Deliver FHWA sponsored course to maintain organization momentum	Feb - June 2005
II	Develop initial course offerings consistent with Phase I effort, and deliver pilot courses to assess program	July - Sept. 2005
	Further identify courses and curriculum to be developed	July - Sept. 2005
III	Assess the Pilot course offerings in phase II including delivery methods, and finalize program structure	Oct, - Dec. 2005
IV	Finalize Program offerings and Administer on-going training program	Target for Jan 2006

In order to accomplish the above tasks, the SCR TTC will form a Curriculum Committee in the 1st Quarter of 2005. The Curriculum Committee will then have the responsibility to develop the training program and training tracks from the program. The committee will be comprised of members of the transit agencies, and associated colleges, and will be lead by a program facilitator. It is anticipated that the needs assessment and gap analysis will be a major input to the decisions for the development of the appropriate training tracks.

The success of this plan is contingent on two vital funding sources. The first source is the earmark currently being pursued via the current federal transportation appropriations bill. The funding of \$750,000 from the earmark will be spread over three years, and will be used to administer the program, and underwrite the cost of course delivery.

The second funding source is the IDRC Grant being pursued by the colleges. The use of funds from this source will be directed towards the development

of courses as identified by the needs assessment. The courses will be developed in co-operation with the associated universities. These courses will also become part of the college curriculum offered for degree award. Details of the time phased spending for the program activities are contained in the **Financial Plan** section of the business plan.

IV. Operational Plan

The consortium functions through a Board of Directors (BOD) which is representative of all the consortium members. In addition the Board has established a committee structure, and from time to time will modify the committee structure as demands on the consortium change.

The SCR TTC currently has three operating committees reporting to the Board. They comprise the Legislative Committee, the Organization Committee, and the Planning Committee.

The BOD has elected a Chairman, Vice Chairman, Vice President and a Secretary at its first formal meeting. The minutes of the first formal meeting are attached for purposes of historical record, and to act as a model for other organizations to follow. (Attachment 3)

Board Chairman: Jim Ditch, Long Beach Transit System

Vice Chairman: Cal Macy, Long Beach City College

Vice President: Ralph Merced, Santa Monica Bus

Secretary: Alan Fox, Attorney to the Consortium

Board Members:

Kevin Anderson	San Bernardino Valley College
Tom Barrio	City of Montebello Bus Lines
Steve Donley	Cypress College
Jim Ditch	Long Beach Transit System
Dan Encinas	LA Trade Tech
Cal Macy	Long Beach City College
Ralph Merced	Santa Monica Bus
Al Pierce	Orange Co Transportation Auth.
Mike Slavich	Rio Honda College
Milo Victoria	LA MTA

Professional and Advisory Support

The American Public Transit Exams Institute (APTREX) has functioned as the organizational management consultant for the SCR TTC, and has provided domain knowledge regarding training, certification, and program delivery techniques.

Contact Information and Website

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V. Startup Expenses and Capitalization

Capitalization and startup expenses are covered by financial contributions of the founding members and by the ITS Grant from the Federal Highway Administration ITS-Joint Program Office (JPO). The expenses for this start up effort are detailed below:

Expense item	Projected Cost
Legal Fees	(TBD)
Organizational Costs	(TBD)
Initial Needs Analysis	\$45,000
Planning Costs	\$25,000
Total Projected start up costs	\$170, 000
Total Seed Money obtained²	\$170,000

² Seed money's obtained form the 13 founding transit members of the consortium, and an initial grant of \$70K from FHWA

VI. Financial Plan

Total Revenue (\$ Thousands)

Revenue Source of Income	2004	2005	2005	2007	2008
Membership Fee's ³	\$100	\$110	\$121	\$133	\$146
Course Fee's ⁴		\$25	\$55	\$66	\$82
Grants ⁵	\$70	\$250	\$250	\$250	\$300
In-Kind Services ⁶		\$300	\$600	\$600	
Total Revenue	\$170	\$685	\$1,026	\$1049	\$528
Memo: Number of sections delivered		5	10	12	12
Memo: Number of courses developed		2	4	4	Dev. Complete

³ Based on initial membership fee's escalated at 10% per year, plus fees for educational and industry partners

⁴ Course fee's set at \$250 / course. Fee's escalated at 10% per year. Total revenue per course is \$5,000. based on 20 students per course

⁵ Initial funding (2004) is the ITS Grant; Subsequent funding is obtained via the earmark (\$750K) extended over three years. Revenue beyond the three years is obtained from additional earmarks or endowments

⁶ Majority of in-kind services are obtained from the Educational partners, and is based on a service contribution of \$150K per course developed. Total of 10 courses developed over 3 years

Total Expenditures (\$ Thousands)

Total Expenditures	2004	2005	2006	2007	2008
Program ⁷ Administration		\$175	\$183	\$193	\$202
Course Development ⁸		\$300	\$600	\$600	
Course Delivery ⁹		\$50	\$110	\$145	\$152
Total Costs¹⁰		\$525	\$893	\$938	\$354
Memo: Number of sections delivered		5	10	12	12
Memo: Number of courses developed		2	4	4	Dev. complete

⁷ Based on 2 man years of administrative effort to perform program management functions and work with the educational partners on course development. Escalated at 5% per year

⁸ Based on a cost of \$150K per course developed

⁹ Based on a 3 day course with a cost of delivery at \$10K per course including instructor, course materials, breaks, and lunch. Difference between course delivery cost and course revenue will be subsidized by the SCR TTC

¹⁰ Difference between revenue and cost is the contingency amount

VII. Appendices

A. Consortium Members:

Transit Members	College Members
Commerce Municipal Bus Lines	Cerritos College
Culver City Municipal Bus Lines	Citrus College
Foothill Transit	Coastline College
Gardena Municipal Bus Lines	College of Canyons
LACMTA	College of Desert
Long Beach Transit	Compton College
Montebello Bus Lines	Cypress College
Norwalk Transit	El Camino College
Orange County Transit Authority	Golden West College
OMNITRANS	L A Trade Tech College
Santa Clarita Transit	Long Beach City College
Santa Monica Municipal Bus Lines	Orange Coast College
Torrance Transit System	Pasadena City College
Sunline Transit	Rio Hondo College
Affiliated Members	San Bernardino Valley College
Economic & Workforce Development Program	Santa Ana College

B. Corporation By-laws

(Attachment 1)

C. Inventory, Needs Assessment and Gap Analysis Report

(Attachment 2)

D. Minutes of first formal Board of Directors Meeting

(Attachment 3)

E. Inventory of Employee Training Pool

Agency	Employee Pool (SOURCE: APTA)
Commerce Municipal Bus Lines	119 Employees
Culver City Municipal Bus Lines	120 Employees
Foothill Transit	528 Employees
Gardena Municipal Bus Lines	109 Employees
LACMTA	9,850 Employees
Long Beach	730 Employees
Montebello Bus Lines	215 Employees
Norwalk Transit	111 Employees
Orange County Transit	2061 Employees
OMNITRANS	667 Employees
Riverside County (Joining SCR TTC in 2005)	604 Employees
San Diego (Joining SCR TTC in 2005)	2247 Employees
Santa Clarita Transit	161 Employees
Santa Monica Municipal Bus Lines	380 Employees
Torrance Transit System	105 Employees
Sunline Transit	225 Employees
Total	18232

Attachment 1

Attachment 2

Attachment 3