



**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (METRO)
PERSONNEL/HUMAN RESOURCES STANDING COMMITTEE AGENDA
REGULAR MEETING**

JANUARY 13, 2023 – 1:00 PM

**DUE TO COVID-19, THIS MEETING WILL BE CONDUCTED VIA
TELECONFERENCE ONLY (NO PHYSICAL LOCATION) PURSUANT TO
ASSEMBLY BILL 361 (GOVERNMENT CODE SECTION 54953)**

MEMBERS OF THE PUBLIC MAY NOT ATTEND THIS MEETING IN PERSON

The public may participate remotely via the Zoom website [at this link](#) and following the instructions or by calling 1-669-900-9128 Meeting ID 824 5729 9000 Passcode 872242.

Public comment may be submitted via email to boardinquiries@scmttd.com. Please indicate in your email the agenda item to which your comment applies. Comments submitted before the meeting will be provided to the Directors before or during the meeting. Comments submitted after the meeting is called to order will be included in the meeting packet link or minutes. Oral public comments will also be accepted during the meeting through Zoom. Should Zoom not be operational, please check online at: www.scmttd.com for any updates or further instruction.

The Personnel/Human Resources Standing Committee Meeting Agenda Packet can be found online at www.SCMTD.com.

The Committee may take action on each item on the agenda. The action may consist of the recommended action, a related action or no action. Staff recommendations are subject to action and/or change by the Board of Directors.

COMMITTEE ROSTER

Director Larry Pageler, 2022 Board Chair
Director Jimmy Dutra, 2022 Board Vice Chair
Director Donna Lind, Immediate Past Board Chair
Director Kristen Brown
Director Rebecca Downing

County of Santa Cruz
City of Watsonville
City of Scotts Valley
City of Capitola
County of Santa Cruz

Michael Tree
Julie Sherman

METRO CEO/General Manager
METRO General Counsel

MEETING TIME: 1:00 PM

NOTE: THE COMMITTEE CHAIR MAY TAKE ITEMS OUT OF ORDER

- 1 CALL TO ORDER**
- 2 ROLL CALL**
- 3 ADDITIONS/DELETIONS FROM AGENDA/ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS**
- 4 ORAL AND OTHER COMMUNICATIONS TO THE PERSONNEL/HUMAN RESOURCES STANDING COMMITTEE**
This time is set aside for Directors and members of the public to address any item not on the Agenda, but which is within the matter jurisdiction of the Committee. If you wish to address the Committee, please follow the directions at the top of the agenda. If you have anything that you wish distributed to the Committee and included for the official record, please include it in your email. Comments that require a response may be deferred for staff reply.
- 5 REVIEW REQUEST TO AUTHORIZE FUNDING FOR A SENIOR CUSTOMER SERVICE REPRESENTATIVE**
Dawn Crummié, HR Director
- 6 ADJOURNMENT**

Accessibility for Individuals with Disabilities

This document has been created with accessibility in mind. With the exception of certain 3rd party and other attachments, it passes the Adobe Acrobat XI Accessibility Full Check. If you have any questions about the accessibility of this document, please email your inquiry to accessibility@scmtd.com. Upon request, Santa Cruz METRO will provide for written agenda materials in appropriate alternative formats, or disability-related modification or accommodation, including auxiliary aids or services, to enable individuals with disabilities to participate in and provide comments at/related to public meetings. Please submit a request, including your name, phone number and/or email address, and a description of the modification, accommodation, auxiliary aid, service or alternative format requested at least two days before the meeting. Requests should be emailed to boardinquiries@scmtd.com or submitted by phone to the Executive Assistant at 831.426.6080. Requests made by mail (sent to the Executive Assistant, Santa Cruz METRO, 110 Vernon Street, Santa Cruz, CA 95060) must be received at least two days before the meeting. Requests will be granted whenever possible and resolved in favor of accessibility.

Public Comment

If you wish to address the Board, please follow the directions at the top of the agenda. If you have anything that you wish distributed to the Board and included in the official report, please include it in your email. Comments that require a response may be deferred for staff reply.



DATE: January 13, 2023
TO: Personnel/Human Resources Standing Committee
FROM: Dawn Crummié, HR Director
**SUBJECT: REVIEW REQUEST TO AUTHORIZE FUNDING FOR A SENIOR
CUSTOMER SERVICE REPRESENTATIVE**

I. RECOMMENDED ACTION

That the Personnel/Human Resources Standing Committee review the request for authorization to fund a Senior Customer Service Representative in the Customer Service Department and recommend approval to the full Board of Directors.

II. SUMMARY

- In order to address the needs of the Customer Service Department, the Customer Service Manager has determined the need for an additional Senior Customer Service Representative position.
- Santa Cruz Metropolitan Transit District (METRO) currently has one existing Senior Customer Service position.
- The Customer Service Department operates 7-days a week, with the exception of major holidays, similar to Fixed Route and ParaTransit services. To ensure proper coverage and provide support to the department and our customers, there is a need for an additional senior position. That position would assist with overseeing the Customer Service Representatives and assist in making decisions such as ensuring proper staffing and phone coverage when the manager is unavailable.
- Currently there is only one Manager (Customer Service Manager) position that must cover all issues that arise over all shifts within a workweek including weekends with the support of the current Senior Customer Service Representative. This has resulted in substantial amounts of overtime.
- It has been determined that a second Senior Customer Service Representative is needed to allow for adequate support 7-days a week and an ability to provide training on operational procedures.
- Staff is recommending that the Board approve the funding of the Senior Customer Service Representative.

III. DISCUSSION/BACKGROUND

In order to provide proper support to the department an additional Senior Customer Service Representative that holds a higher level of knowledge is needed. This includes understanding all aspects of Customer Service such as, phone coverage, staffing, counting cash and reconciliation at both Pacific Station and Watsonville Transit Center, to name a few.

The Senior Customer Service Representative has the knowledge in resolving issues and making sure we have proper staffing and support to avoid burnout and stress within the department. By having two Senior Customer Service Representatives, it will allow for both to properly coordinate training, troubleshoot, perform other duties as needed and allow support coverage 7-days a week.

The additional duties the Senior Customer Service Representative will perform that the existing Customer Service Representative positions do not perform include, but are not limited to, serving as a lead worker over subordinate staff by prioritizing, assigning and monitoring work and providing training as needed.

If approved, an open recruitment will be performed to fill the Senior Customer Service Representative role.

Staff requests the Personnel/Human Resources Standing Committee recommend to the full Board of Directors approval of the funding for the Senior Customer Service Representative position.

IV. STRATEGIC PLAN PRIORITIES ALIGNMENT

This report ties to the following strategic priorities:

- Service Quality and Delivery
- Employee Engagement: Attract, Retain and Develop

V. FINANCIAL CONSIDERATIONS/IMPACT

The expected increase needed in additional funds are roughly \$37,141 for FY23 and \$112,216 for FY24 Budget for funding the Senior Customer Service Representative.

VI. ALTERNATIVES CONSIDERED

- Not approving the funding of the position. Staff does not recommend this action as it would continue to create a problem with calling for overtime and

stress on the overall department and could cause delays or inconveniences to our customers. This could result in unexpected booth closures or longer wait times on phones or while standing in line at the booths. This position meets the needs of METRO.

VII. ATTACHMENTS

Attachment A: Senior Customer Service Representative Job Description

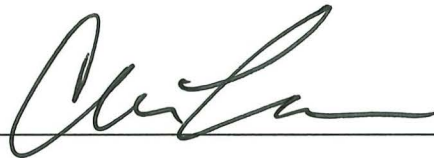
Prepared by: Rina Solorio, Customer Service Manager and
Dawn Crummié, HR Director

VIII. APPROVALS

Dawn Crummié, HR Director



Approved as to fiscal impact:
Chuck Farmer, Chief Financial Officer



Michael Tree
CEO/General Manager





Attachment A

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: AS110
FLSA Status: Non-exempt

Senior Customer Service Representative

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Senior Customer Service Representative performs lead worker and advanced customer service work related to providing information and assistance regarding transit services to customers; conducts transit-related special projects which may include marketing, public information, and community outreach activities; and- Performs related work as required

DISTINGUISHING CHARACTERISTICS:

Senior Customer Service Representative is the advanced-lead level class in the series. An incumbent in this class serves as a lead worker, performs the more advanced customer service functions in a call center or information booth, and assists with outreach and public relations functions. This class may be distinguished from the lower level class of Customer Service Representative because an incumbent in the latter class performs journey-level duties and does not have formal lead worker responsibilities. This class may be distinguished from the higher level class of Customer Service Supervisor because an incumbent in the latter class supervises the work of subordinate customer service staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Serves as a lead worker over subordinate staff by prioritizing, assigning and monitoring work and providing training as needed; may provide input on performance evaluations.
- Performs sales and cashiering activities using print encoding media (PEMs) and/or selling transit tickets, passes, and coupons; operates a cash register and performs credit card transactions; takes photographs of customers for purposes of creating identification badges; reconciles booth sales.
- Provides information to the public regarding transit services, including the location of bus stops, routes, detours, fares, transfers, and policies; responds to inquiries about pass eligibility, photo identification, lost and found, and bus schedule publication and distribution.
- Creates ride reservations for Paratransit eligible customers; negotiates trip options and times with customers and their service providers; calculates fares, arranges for client callbacks; processes cancellations and no shows; maintains related records and documentation.
- Receives and responds to public information requests; receives and processes compliments, complaints, and service improvement suggestions.
- Participates in outreach and public relations activities and may represent Santa Cruz METRO at special events; may assist with the design and preparation of brochures, informational flyers, written articles, and news releases.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Operates a cash register and photography equipment
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



Attachment A

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Modern office practices, procedures, and equipment, including multi-line telephone systems.
- Applicable Federal, State, and local laws and regulations pertaining to Department of Transportation regulations and policies governing Americans with Disabilities Act (ADA) Fixed Route and Paratransit service.
- Regulations, policies, and procedures affecting Santa Cruz METRO customers.
- Specialized scheduling software.
- Local and regional transportation services.
- Principles and methods of currency counting and cash record-keeping.
- Effective customer service techniques.
- Public speaking techniques.
- Basic mathematics including, percentages and basic statistics.
- Telephone techniques and etiquette.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Serve as a lead worker over subordinate staff.
- Provide information to the public in a clear, accurate, and effective manner.
- Count and record currency and passenger fare receipts accurately and safely, in accordance with established procedures.
- Demonstrate excellent public relations skills, obtaining and providing information in a clear, accurate and professional manner.
- Communicate detailed information about local and regional transit systems, including routes and schedules.
- Address customer complaints in a sensitive and tactful manner.
- Assist with designing and preparing a variety of public information, marketing, and planning materials and presentations.
- Maintain a calm demeanor in stressful situations.
- Maintain confidentiality of materials, records, files, and other privileged information using tact and discretion.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Drive a Santa Cruz METRO vehicle to perform assignments as required.
- Utilize specialized equipment such as ticketing machines, cash registers, and photo identification printers.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.
- Ability to handle conflict resolution and mediate solutions.



Attachment A

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

MINIMUM QUALIFICATIONS:

Any combination of experience and education that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Education, Training, and Experience:

Three (3) years of progressively responsible customer service experience equivalent to a Customer Service Representative.

Fluency in English and Spanish is desirable.

LICENSES AND CERTIFICATES:

A valid California Driver’s License will be required at the time of appointment and throughout employment.

Must be able to obtain and maintain a current, valid California Class “C” Driver’s License.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist, and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee may work in a standard office, call center or information booth environment where the noise level is usually moderate. May work in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	08-23-19
*Revised:	00-00-00
*Job Family:	Customer Service
*Job Series:	Customer Service
*Job Series Level:	Advanced-Lead
*Confidential:	No

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