



**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (METRO)
BOARD OF DIRECTORS AGENDA
REGULAR MEETING
NOVEMBER 16, 2018 – 9:00 AM
WATSONVILLE CITY COUNCIL CHAMBERS
275 MAIN STREET
WATSONVILLE, CA 95076**

MISSION STATEMENT: “To provide a public transportation service that enhances personal mobility and creates a sustainable transportation option in Santa Cruz County through a cost-effective, reliable, accessible, safe, clean and courteous transit service.”

The Board Meeting Agenda Packet can be found online at www.SCMTD.com and is available for inspection at METRO’s Administrative offices at 110 Vernon Street, Santa Cruz, California.

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BOARD ROSTER

Director Ed Bottorff	City of Capitola
Director Cynthia Chase	City of Santa Cruz
Director Trina Coffman-Gomez	City of Watsonville
Director Jimmy Dutra	City of Watsonville
Director Norm Hagen	County of Santa Cruz
Director John Leopold	County of Santa Cruz
Director Donna Lind	City of Scotts Valley
Director Cynthia Mathews	City of Santa Cruz
Director Bruce McPherson	County of Santa Cruz
Director Dan Rothwell	County of Santa Cruz
Director Mike Rotkin	County of Santa Cruz
Ex-Officio Director Davon Thomas	UC Santa Cruz
Ex-Officio Director Alta Northcutt	Cabrillo College
Alex Clifford	METRO CEO/General Manager
Julie Sherman	METRO General Counsel

TITLE 6 - INTERPRETATION SERVICES / TÍTULO 6 - SERVICIOS DE TRADUCCIÓN

Spanish language interpretation and Spanish language copies of the agenda packet are available on an as-needed basis. Please make advance arrangements with the Executive Assistant at 831-426-6080. Interpretación en español y traducciones en español del paquete de la agenda están disponibles sobre una base como-necesaria. Por favor, hacer arreglos por adelantado con Coordinador de Servicios Administrativos al numero 831-426-6080.

AMERICANS WITH DISABILITIES ACT

The Board of Directors meets in an accessible facility. Any person who requires an accommodation or an auxiliary aid or service to participate in the meeting, or to access the

agenda and the agenda packet (including a Spanish language copy of the agenda packet), should contact the Executive Assistant, at 831-426-6080 as soon as possible in advance of the Board of Directors meeting. Hearing impaired individuals should call 711 for assistance in contacting Santa Cruz METRO regarding special requirements to participate in the Board meeting. For information regarding this agenda or interpretation services, please call Santa Cruz METRO at 831-426-6080.

SECTION I: OPEN SESSION

NOTE: THE BOARD CHAIR MAY TAKE ITEMS OUT OF ORDER

1 CALL TO ORDER

2 ROLL CALL

3 ANNOUNCEMENTS

- 3-1. Carlos Landaverry to introduce his Spanish language interpretation services, which will be available during "Oral Communications" and for any other agenda item for which these services are needed.
- 3-2. Today's meeting is being broadcast by Community Television of Santa Cruz County.

4 BOARD OF DIRECTORS COMMENTS

5 ORAL AND WRITTEN COMMUNICATIONS TO THE BOARD OF DIRECTORS

This time is set aside for Directors and members of the general public to address any item not on the Agenda which is within the subject matter jurisdiction of the Board. No action or discussion shall be taken on any item presented except that any Director may respond to statements made or questions asked, or may ask questions for clarification. All matters of an administrative nature will be referred to staff. All matters relating to Santa Cruz METRO will be noted in the minutes and may be scheduled for discussion at a future meeting or referred to staff for clarification and report. Any Director may place matters brought up under Communications to the Board of Directors on a future agenda. In accordance with District Resolution 69-2-1, speakers appearing at a Board meeting shall be limited to three minutes in his or her presentation. Any person addressing the Board may submit written statements, petitions or other documents to complement his or her presentation. When addressing the Board, the individual may, but is not required to, provide his/her name and address in an audible tone for the record.

6 WRITTEN COMMUNICATIONS FROM MAC (if applicable)

7 LABOR ORGANIZATION COMMUNICATIONS

8 ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS

CONSENT AGENDA

All items appearing on the Consent Agenda are recommended actions which are considered to be routine and will be acted upon as one motion. All items removed will be considered later in the agenda. The Board Chair will allow public input prior to the approval of the Consent Agenda items.

9-01 RECOMMENDED ACTION ON TORT CLAIMS

Shonoa Ruddick, Safety, Security and Risk Director

- 9-02 ACCEPT AND FILE: PRELIMINARY APPROVED CHECK JOURNAL DETAIL FOR THE MONTH OF OCTOBER 2018**
Angela Aitken, CFO
- 9-03 ACCEPT AND FILE: MINUTES OF THE OCTOBER 26, 2018 BOARD OF DIRECTORS MEETING AND THE NOVEMBER 9, 2018 PERSONNEL/HR STANDING COMMITTEE MEETING**
Alex Clifford, CEO/General Manager
- 9-04 ACCEPT AND FILE: QUARTERLY STATUS REPORT OF GRANT APPLICATIONS, ACTIVE GRANTS AND FUTURE OPPORTUNITIES JULY – SEPTEMBER 2018**
Thomas Hiltner, Grants/Legislative Analyst
- 9-05 ACCEPT AND FILE: METRO PARACRUZ OPERATIONS STATUS REPORT FOR JULY, AUGUST AND SEPTEMBER 2018**
Daniel Zaragoza, Operations Manager, ParaTransit Division
- 9-06 ACCEPT AND FILE: METRO SYSTEM RIDERSHIP REPORTS FOR THE FOURTH QUARTER OF FY18**
Barrow Emerson, Planning and Development Director
- 9-07 APPROVE: CONSIDERATION OF AUTHORIZING THE CEO TO EXECUTE A CONTRACT WITH GIRO, INC. FOR HASTUS SOFTWARE MAINTENANCE AND SUPPORT**
Isaac Holly, IT and ITS Director
- 9-08 APPROVE: CONSIDERATION OF AWARD OF CONTRACT TO CLAREMONT BEHAVIORAL SERVICES FOR EMPLOYEE ASSISTANCE PROGRAM SERVICES NOT TO EXCEED \$26,000**
Angela Aitken, CFO and Acting HR Director
- 9-09 APPROVE: CONSIDERATION OF RESOLUTION APPROVING THE FY19 REVISED CAPITAL BUDGET**
Angela Aitken, CFO

REGULAR AGENDA

- 10 PRESENTATION OF EMPLOYEE LONGEVITY AWARDS FOR THOMAS HILTNER (20 years), ROBERT KRAUSE (10 years), ANDREW KEARNEY (10 years), NATHANAEL ABREGO (10 years) AND RUBEN VALDEZ (10 years)**
Bruce McPherson, Board Chair
- 11 ORAL CEO UPDATE**
Alex Clifford, CEO/General Manager
- 12 ACCEPT AND FILE: THE YEAR TO DATE MONTHLY FINANCIAL REPORT AS OF AUGUST 31, 2018**
Angela Aitken, CFO

- 13 ORAL UPDATE ON IMPLICATIONS OF PROP 6 ELECTION RESULTS**
Barrow Emerson, Planning and Development Director
- 14 ACCEPT: REPORT ON UCSC ARTICULATED BUS PILOT PROJECT**
Barrow Emerson, Planning and Development Director
- 15 ACCEPT: UNIFIED CORRIDOR INVESTMENT STUDY UPDATE**
Barrow Emerson, Planning and Development Director
- 16 CONSIDERATION AND APPROVAL OF THE CPS HR CONSULTING SEIU CLASSIFICATION STUDY AND NEW POSITIONS DESCRIPTIONS**
Angela Aitken, CFO and Acting HR Director
- 17 CONSIDERATION AND APPROVAL OF THE FINAL CPS HR CONSULTING MANAGEMENT TOTAL COMPENSATION STUDY RESULTS**
Angela Aitken, CFO and Acting HR Director
- 18 ANNOUNCEMENT OF NEXT MEETING: FRIDAY, DECEMBER 14, 2018 AT 9:00AM AT SCOTTS VALLEY CITY COUNCIL CHAMBERS, ONE CIVIC CENTER DRIVE, SCOTTS VALLEY, CA**
Bruce McPherson, Board Chair
- 19 ADJOURNMENT**
Bruce McPherson, Board Chair

Pursuant to Section 54954.2(a)(1) of the Government Code of the State of California, this agenda was posted at least 72 hours in advance of the scheduled meeting at a public place freely accessible to the public 24 hours a day. The agenda packet and materials related to an item on this Agenda submitted to the Board of Directors after distribution of the agenda packet are available for public inspection in the Santa Cruz METRO Administrative Office (110 Vernon Street, Santa Cruz) during normal business hours. Such documents are also available on the Santa Cruz METRO website at www.scmtd.com subject to staff's ability to post the document before the meeting.



DATE: November 16, 2018
TO: Board of Directors
FROM: Shonoa Ruddick, Safety, Security and Risk Director
SUBJECT: RECOMMENDED ACTION ON TORT CLAIMS

I. RECOMMENDED ACTION

That the Board of Directors Approve Staff Recommendations for Claims for the Month of November 2018.

II. SUMMARY

This staff report provides the Board of Directors with recommendations on claims submitted to the Santa Cruz Metropolitan Transit District (METRO).

III. DISCUSSION/BACKGROUND

METRO's Risk Department received two claims for the month of November 2018 for money or damages. As a public entity, METRO must act "within 45 days after the claim has been presented" (Govt C §912.4(a)). See staff recommendations in paragraph VI.

IV. FINANCIAL CONSIDERATIONS/IMPACT

None

V. ALTERNATIVES CONSIDERED

Within the 45-day period, the Board of Directors may take the following actions:

- Reject the claim entirely;
- Allow it in full;
- Allow it in part and reject the balance;
- Compromise it, if the liability or amount due is disputed (Govt C §912.4(a)); or
- Do nothing, and allow the claim to be denied by operation of law (Govt C §912.4 (c)).

VI. DESCRIPTION OF CLAIMS

Claimant	Claim #	Description	Recommended Action
Safeco Ins. / Hernandez, Jose	18-0018	Claimant alleges that a METRO Bus side-swiped his car. Amount of claim: \$7,185.33.	Reject
LePage, Michael	18-0019	Claimant alleges that a ParaCruz Bus hit his parked car. Amount of claim: \$2,513.67.	Reject

Prepared by: Tom Szeszowicki, Safety Specialist

VII. APPROVAL:

Shonoa Ruddick
Safety, Security and Risk Director



Alex Clifford, CEO/General Manager



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DATE: November 16, 2018
TO: Board of Directors
FROM: Angela Aitken, Chief Financial Officer
**SUBJECT: ACCEPT AND FILE PRELIMINARY APPROVED CHECK JOURNAL
DETAIL FOR THE MONTH OF OCTOBER 2018**

I. RECOMMENDED ACTION

That the Board of Directors accept and file the preliminary approved Check Journal Detail for the month of October 2018

II. SUMMARY

- This staff report provides the Board with a preliminary approved Check Journal Detail for the month of October 2018.
- The Finance Department is submitting the check journals for Board acceptance and filing.

III. DISCUSSION/BACKGROUND

This preliminary approved Check Journal Detail provides the Board with a listing of the vendors and amounts paid out on a monthly cash flow basis (Operating and Capital expenses).

All invoices submitted for the month of October 2018 have been processed, checks issued and signed by the Chief Financial Officer.

IV. FINANCIAL CONSIDERATIONS/IMPACT

None. The check journal is a presentation of invoices paid in October 2018 for purposes of Board review, agency disclosure, accountability and transparency.

V. ALTERNATIVES CONSIDERED

N/A

VI. ATTACHMENTS

Attachment A: Check Journal Detail for the Month of October 2018

Prepared By: Holly Alcorn, Accounting Specialist

VII. APPROVALS:

Angela Aitken, Chief Financial Officer  _____

Alex Clifford, CEO/General Manager  _____

Attachment A

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SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
CHECK JOURNAL DETAIL BY CHECK NUMBER
ALL CHECKS FOR ACCOUNTS PAYABLE

PAGE 1

DATE: 10/01/18 THRU 10/31/18

CHECK NUMBER	CHECK DATE	CHECK VENDOR	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
63376	10/01/18	003151	1,203.67	ABC BUS INC		89010	CREDIT	-40.65	
						89011	INVENTORY ORDER	1,186.42	
						89019	INVENTORY ORDER	57.90	
63377	10/01/18	001D	574.90	AT&T		89046	AUG 18 POINT2POINT	574.90	
63378	10/01/18	001356	5,303.91	BRENCO OPERATING-TEXAS, LP		89009	INVENTORY ORDER	5,303.91	
63379	10/01/18	M022	88.90	CAPELLA, KATHLEEN	0	89096	OCT 18 RETIREE SUPP	88.90	
63380	10/01/18	001230	3,830.04	CAPITOL CLUTCH & BRAKE, INC.		89064	INVENTORY ORDER	3,830.04	
63381	10/01/18	130	54.35	CITY OF WATSONVILLE UTILITIES		88997	8/13-9/12 WATER WTC	54.35	
63382	10/01/18	001124	47,042.18	CLEAN ENERGY		89025	LNG 8/17/18	5,432.78	
						89026	LNG 8/21/18	8,759.45	
						89027	LNG 8/23/18	6,204.87	
						89028	LNG 8/27/18	8,652.17	
						89029	LNG 8/29/18	6,404.49	
						89030	LNG 8/31/18	5,750.24	
						89031	LNG 8/15/18	5,838.18	
63383	10/01/18	075	81.10	COAST PAPER & SUPPLY INC.		89004	CUSTODIAL SUPPLIES	81.10	
63384	10/01/18	003034	2,890.00	COASTAL LANDSCAPING INC. DBA		89052	SEPT 18 LANDSCAPING	2,890.00	
63385	10/01/18	367	385.00	COMMUNITY TELEVISION OF		89083	8/24 BOARD MEETING	385.00	
63386	10/01/18	003116	25,898.64	CUMMINS PACIFIC LLP		89069	RPR VEH #1003	6,768.44	
						89070	RPR VEH #1207	18,221.75	
						89079	RPR VEH #1205	908.45	
63387	10/01/18	157	1,619.35	DELL MARKETING L.P.		89001	2 LAPTOPS	1,619.35	
63388	10/01/18	003274	13,159.95	EAST BAY TIRE CO.		89013	TIRES	3,617.60	
						89014	TIRES	370.66	
						89015	TIRES	2,924.22	
						89016	TIRES	1,033.60	
						89017	TIRES	181.51	
						89056	TIRES	185.33	
						89057	TIRES	979.10	
						89058	TIRES	1,033.60	
						89059	TIRES	1,033.60	
						89060	TIRES	1,066.30	
						89085	TIRES	274.96	
						89086	TIRES	459.47	
63389	10/01/18	432	9,013.11	EXPRESS SERVICES INC.		89000	TEMP W/E 9/16/18	856.58	
						89006	TEMP W/E 9/2/18	1,333.13	
						89065	TEMP W/E 9/16/18	2,382.60	
						89066	TEMP W/E 9/9/18	1,900.00	
						89067	TEMP W/E 9/2/18	1,216.00	
						89072	TEMP W/E 9/16/18	1,324.80	
63390	10/01/18	002952	2,787.64	FLYERS ENERGY LLC		89008	9/1-9/15 FUEL	2,787.64	
63391	10/01/18	001189	425.95	GARY KENVILLE LOCKSMITH	7	89003	RPR LOCK SVTC	135.00	
						89020	RPR KEY MMF STEAM BA	290.95	
63392	10/01/18	117	2,946.20	GILLIG LLC		89040	RPR VEH #2213	42.88	
						89062	INVENTORY ORDER	1,559.66	
								7.54	

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SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
CHECK JOURNAL DETAIL BY CHECK NUMBER
ALL CHECKS FOR ACCOUNTS PAYABLE

DATE: 10/01/18 THRU 10/31/18

CHECK NUMBER	CHECK DATE	CHECK VENDOR	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
63393	10/01/18	44.45 M041		GOUVEIA, ROBERT	0	89080	INVENTORY ORDER	1,336.12	
63394	10/01/18	45.88 282		GRAINGER		89091	OCT 18 RETIREE SUPP	44.45	
63395	10/01/18	1,200.00 001099		HENRY GEHRING		89084	INVENTORY ORDER	45.88	
63396	10/01/18	125.73 166		HOSE SHOP, THE INC		89071	ANNUAL INSPECTION	1,200.00	
63397	10/01/18	248.46 003122		INDUSTRIAL SAFETY SUPPLY CO		89055	INVENTORY ORDER	125.73	
63398	10/01/18	1,432.20 1117		KELLEY'S SERVICE INC.		89012	RAIN BOOTS	248.46	
						89023	RPR VEH #603	625.02	
						89024	RPR VEH #505	69.11	
						89074	INVENTORY ORDER	75.78	
						89075	RPR VEH #802	152.15	
						89087	RPR VEH #2701	210.58	
						89088	RPR VEH #2701	286.10	
						89032	CURB PAINT	13.46	
63399	10/01/18	773.46 036		KELLY-MOORE PAINT CO., INC.		89032	CURB PAINT	773.46	
63400	10/01/18	360.00 003271		KJRB INC		89076	TOWING VEH #9821	360.00	
63401	10/01/18	150.00 003298		LA GANGA ESPECIAL CNP		89034	FAIR ADVERTISING	150.00	
63402	10/01/18	76.28 E1014		MENDOZA, MARIZA		88998	OFFICE SUPPLIES	76.28	
63403	10/01/18	725.28 041		MISSION UNIFORM		89007	OFFICE SUPPLIES	76.28	
						89037	LAUNDRY SERVICE	30.50	
						89038	LAUNDRY SERVICE	263.76	
						89053	CUSTODIAL SUPPLIES	19.00	
						89054	CUSTODIAL SUPPLIES	30.00	
						89077	CUSTODIAL SUPPLIES	30.00	
						89078	CUSTODIAL SUPPLIES	10.50	
						89089	CUSTODIAL SUPPLIES	10.50	
						89090	CUSTODIAL SUPPLIES	19.00	
						89039	LAUNDRY SERVICE	312.02	
63404	10/01/18	572.62 004		NORTH BAY FORD LINC-MERCURY		89039	LAUNDRY SERVICE	33.68	
						89063	RPR VEH #802	538.94	
63405	10/01/18	148.43 043		PALACE ART & OFFICE SUPPLY		89033	OFFICE SUPPLIES	148.43	
63406	10/01/18	1,930.00 002947		PEDALERS EXPRESS	7	89005	AUG 18 COURIER SVC	148.43	
63407	10/01/18	44.45 M109		PEREZ, CHERYL		89092	OCT 18 RETIREE SUPP	1,930.00	
63408	10/01/18	67.50 481		PIED PIPER EXTERMINATORS, INC.		89036	SEPT 18 PEST GOLF	44.45	
63409	10/01/18	147.15 050		PITNEY BOWES INC. RENTAL PMT		88999	10/1-12/31 METER REN	67.50	
63410	10/01/18	106.69 107A		PROBUILD COMPANY LLC		89047	RPR SVTC	147.15	
						89048	RPR SVTC	7.75	
						89049	FLAG OBSERVANCE	10.85	
						89050	RPR BIRD NETTING	19.57	
						89051	RPR CALL CENTER	56.89	
63411	10/01/18	744.00 001153		REPUBLIC ELEVATOR COMPANY INC	0	89051	RPR CALL CENTER	11.63	
63412	10/01/18	88.90 M085		ROSSI, DENISE		88995	SEPT 18 MAINTENANCE	744.00	
63413	10/01/18	44.45 M030		ROWE, RUBY		89094	OCT 18 RETIREE SUPP	88.90	
63414	10/01/18	4,810.76 002099		SANDMAN GLASS INC		89035	OCT 18 RETIREE SUPP	44.45	
63415	10/01/18	115.81 135		SANTA CRUZ AUTO PARTS, INC.		89073	BLACK OUT FILM WTC	44.45	
63416	10/01/18	49.85 001232		SPECIALIZED AUTO AND		89081	INVENTORY ORDER	115.81	
63417	10/01/18	177.75 001040		TERRYBERRY CO., LLC		89082	SMOG CHECK VEH #802	49.85	
63418	10/01/18	6,318.86 003285		TRANSIT HOLDINGS INC		89021	ANNIVERSARY AWARD	177.75	
						89021	INVENTORY ORDER	2,843.85	

Attachment A

DATE: 10/01/18 THRU 10/31/18

CHECK NUMBER	CHECK DATE	CHECK VENDOR	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
63419	10/01/18	1,117.76 002829		VALLEY POWER SYSTEMS, INC.			INVENTORY ORDER	153.94	
63420	10/01/18	912.24 434		VERIZON WIRELESS	0		INVENTORY ORDER	646.98	
63421	10/01/18	112.56 001353		VISION COMMUNICATIONS			INVENTORY ORDER	3.11	
63422	10/01/18	224.00 186		WILSON, GEORGE H., INC.			INVENTORY ORDER	424.38	
63423	10/01/18	44.45 M088		YAGI, RANDY			INVENTORY ORDER	2,246.60	
63424M	10/01/18	1,717.00 003210		DEPARTMENT OF FORESTRY & FIRE			INVENTORY ORDER	357.54	
				10/3-6/30/19 LOMA PR			INVENTORY ORDER	930.53	
63425	10/08/18	102.68 003151		ABC BUS INC			CREDIT	-170.31	
63426	10/08/18	261.97 E437		AITKEN, ANGELA			8/13-9/12 WIFI BUSES	912.24	
63427	10/08/18	490.48 E662		ALVEY, ERRON			REPLACEMENT BATTERY	112.56	
63428	10/08/18	47.59 002861		AMERICAN MESSAGING SVCS, LLC			ANNUAL BACKFLOW TEST	224.00	
							OCT 18 RETIREE SUPP	44.45	
							10/3-6/30/19 LOMA PR	1,717.00	MANUAL
63429	10/08/18	6,522.86 001D		AT&T			INVENTORY ORDER	102.68	
63430	10/08/18	13,402.32 002802		BATTERY SYSTEMS CORP			CUBICAL INSTALL	261.97	
63431	10/08/18	226.92 003248		BAY ALARM COMPANY			TRAVEL REIMBURSEMENT	490.48	
63432	10/08/18	180.03 E916		BRUBECK, DELEE			SEPT 18 PAGER RENTAL	15.31	
63433	10/08/18	1,565.76 914		CALTRONICS BUSINESS SYSTEMS			AUG 18 PAGER RENTAL	15.31	
63434	10/08/18	592.96 001159		CATTO'S GRAPHICS, INC.			OCT 18 PAGER RENTAL	16.97	
63435	10/08/18	1,553.76 130		CITY OF WATSONVILLE UTILITIES			8/19-9/18 MAIN ACCT	3,802.99	
							8/10-9/9 INTERNET	891.27	
							8/13-9/12 POINT2POIN	1,828.60	
							BATTERIES	4,836.00	
							BATTERIES	5,780.28	
							BATTERIES	2,786.04	
							10/1-1/1 QTRLY ALARM	226.92	
							REIMBURSEMENT	180.03	
							OFFICE SUPPLIES	125.35	
							OFFICE SUPPLIES	1,440.41	
							BUS ROUTE DECALS	592.96	
							8/20-9/17 SEWER WTC	81.69	
							8/20-9/17 WATER WTC	455.14	
							9/20 WASTE WTC	936.30	
							8/20-9/17 WATER WTC	80.63	
							BUS REPAIR VEH#2212	6,473.55	
							RPR NEEDLE VALVE	1,248.82	
							LNG 8/3/18	5,217.33	
							TRAVEL REIMBURSEMENT	899.94	
							CUSTODIAL SUPPLIES	17.44	
							CUSTODIAL SUPPLIES	830.10	
							CREDIT	-49.44	
							RPR VEH #1204	1,399.40	
							TIRES	303.66	
							TIRES	2,067.20	
							TEMP W/E 9/23/18	729.00	

Attachment A

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SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
CHECK JOURNAL DETAIL BY CHECK NUMBER
ALL CHECKS FOR ACCOUNTS PAYABLE

DATE: 10/01/18 THRU 10/31/18

CHECK NUMBER	CHECK DATE	CHECK VENDOR	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
63443	10/08/18	111.82 001297	FASTENAL COMPANY INC	89211			TEMP W/E 9/23/18	1,324.80	
63444	10/08/18	40,757.43 002295	FIRST ALARM	89133			INVENTORY ORDER	111.82	
63445	10/08/18	9,941.08 002952	FLYERS ENERGY LLC	89181			AUG 18 SECURITY ALL	39,957.43	
63446	10/08/18	57.26 003279	FRONTIER COMMUNICATIONS CORP	89216			AUG 18 SECURITY OPS	800.00	
63447	10/08/18	245.90 001189	GARY KENVILLE LOCKSMITH	89134			9/1-9/15 FUEL PC	9,941.08	
63448	10/08/18	36.99 117	GILLIG LLC	89099	7		9/16-10/15 SKY-RIVER	57.26	
63449	10/08/18	593.62 282	GRAINGER	89173			KEYS	80.00	
				89174			KEYS	165.90	
				89140			INVENTORY ORDER	36.99	
				89129			EQUIP RPR SUPPLIES	81.45	
				89130			BATTERIES	60.19	
				89131			PAINTING SUPPLIES	200.25	
				89132			PAINTING SUPPLIES	86.29	
				89151			DRAIN CLEANING	165.44	
63450	10/08/18	430.17 166	HOSE SHOP, THE INC	89152			INVENTORY ORDER	147.93	
				89154			RPR HOSE LEAK	89.67	
				89167			RPR STEAM CLEANER	192.57	
63451	10/08/18	627.00 003410	IHEART MEDIA ENTERTAINMENT INC	89153			SC FAIR ADVERTISING	627.00	
63452	10/08/18	1,124.20 003327	IO, RODNEY H	89141			RPR VEH #1120 PC	1,124.20	
63453	10/08/18	490.50 002158	J. PEREZ ASSOCIATES INC.	89185			BUS AD STRAPS	490.50	
63454	10/08/18	392.44 1117	KELLEY'S SERVICE INC.	89159			CREDIT	-21.94	
				89160			INVENTORY ORDER	229.66	
				89161			INVENTORY ORDER	183.82	
63455	10/08/18	440.19 036	KELLY-MOORE PAINT CO., INC.	89112			TRAFFIC PAINT	440.19	
63456	10/08/18	3,492.47 001233	KIMBALL MIDWEST	89166			INVENTORY ORDER	3,492.47	
63457	10/08/18	270.00 003271	KJRB INC	89170			TOWING VEH #1120 PC	270.00	
63458	10/08/18	684.00 001145	MANAGED HEALTH NETWORK	89142			OCT 18 EAP	684.00	
63459	10/08/18	21,299.51 003017	MANSFIELD OIL CO OF GAINSVILLE	89188			DIESEL 9/17/18	21,299.51	
63460	10/08/18	41.00 041	MISSION UNIFORM	89148			CUSTODIAL SUPPLIES	30.50	
				89149			CUSTODIAL SUPPLIES	10.50	
63461	10/08/18	55.00 E298	MITCHELL, TODD	89182			DMV REIMBURSEMENT	55.00	
63462	10/08/18	750.00 001064	MUNICIPAL MAINTENANCE EQUIPMNT	89210			KANLIFT MMF INSPECT	750.00	
63463	10/08/18	54.50 003326	NIDAL HALABI & NADA ALGHARIB	89107			NAME PLATES BOARD	54.50	
63464	10/08/18	31.91 009	PACIFIC GAS & ELECTRIC	89202			8/24-9/24 1122 RIVER	31.91	
63465	10/08/18	765.72 043	PALACE ART & OFFICE SUPPLY	89115			OFFICE SUPPLIES	143.08	
				89147			OFFICE SUPPLIES	124.96	
				89212			OFFICE SUPPLIES	375.60	
				89213			OFFICE SUPPLIES	24.42	
63466	10/08/18	155.50 481	PIED PIPER EXTERMINATORS, INC.	89214			OFFICE SUPPLIES	97.66	
				89116			SEPT 18 PEST PACIFIC	40.00	
				89117			SEPT 18 PEST BETTYS	60.00	
63467	10/08/18	261.53 107A	PROBUILD COMPANY LLC	89118			SEPT 18 PEST METROMK	55.50	
				89110			ROOF PATCH MATERIALS	69.75	
				89113			ROOF PATCH MATERIALS	172.41	
63468	10/08/18	65.31 135	SANTA CRUZ AUTO PARTS, INC.	89114			MAINT MATERIALS	19.37	
				89163			INVENTORY ORDER	65.31	

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63469	10/08/18	10,494.08 079		SANTA CRUZ MUNICIPAL UTILITIES		89119	8/8-9/6 GOLF CLUB	1,387.30	
						89120	8/8-9/6 1200B RIVER	3,162.02	
						89121	8/8-9/6 PACIFIC	3,798.67	
						89122	8/8-9/6 1200A RIVER	306.17	
						89123	8/8-9/6 WATER-OCEAN	1,050.60	
						89124	8/8-9/6 PACIFIC	55.30	
						89125	8/8-9/6 GOLF CLUB	11.25	
						89126	8/8-9/6 1200 RIVER	193.88	
						89127	8/8-9/6 VERNON	516.49	
						89128	8/8-9/6 VERNON IRRIG	12.40	
						89183	10/15-10/13/19 SUBSC	379.62	
						89200	REPLENISHMENT	161.70	
						89209	SEPT18 REC WATER SVT	169.34	
						89178	INVENTORY ORDER	385.28	
						89171	SMOG VEH #1123	49.85	
						89137	INVENTORY ORDER	26.27	
						89138	RPR VEH #9811	111.06	
						89139	RPR VEH #1204	242.51	
						89164	INVENTORY ORDER	38.57	
						89165	INVENTORY ORDER	1,475.86	
						89168	INVENTORY ORDER	26.16	
						89169	INVENTORY ORDER	725.29	
						89201	BUS OPERATOR BADGES	855.66	
						89204	10/1-12/31 ALARM SVT	210.27	
						89205	10/1-12/31 ALARM SMC	308.60	
						89206	10/1-12/31 ALARM WTC	223.41	
						89189	FREIGHT	53.33	
						89208	FREIGHT	198.44	
						89192	FINGERPRINTING	32.00	
						89193	FINGERPRINTING	32.00	
						89194	FINGERPRINTING	32.00	
						89195	FINGERPRINTING	32.00	
						89196	FINGERPRINTING	32.00	
						89197	FINGERPRINTING	32.00	
						89136	INVENTORY ORDER	795.09	
						89157	INVENTORY ORDER	44.91	
						89191	CREDIT	-68.13	
						89158	INVENTORY ORDER	122.37	
						89143	OCT 18 VISION	9,219.60	
						89215	VINYL FLOORING SMC	485.00	
						89162	INVENTORY ORDER	6,844.43	
						89217	BUS STOP STICKERS	942.31	
						89218	BUS STOP STICKERS	245.25	
						89271	INVENTORY ORDER	882.90	
						89261	EXCEL I CLASS	2,145.00	
						89312	8/19-9/18 MAIN	3,802.99	
63470	10/08/18	379.62 003117		SANTA CRUZ SENTINEL	0				
63471	10/08/18	161.70 122		SCMTD PETTY CASH - OPS					
63472	10/08/18	169.34 002459		SCOTT'S VALLEY WATER DISTRICT					
63473	10/08/18	385.28 003314		SOUTHWEST COMMERCIAL PROD INC.					
63474	10/08/18	49.85 001232		SPECIALIZED AUTO AND					
63475	10/08/18	2,645.72 003285		TRANSIT HOLDINGS INC					
63476	10/08/18	855.66 002207		TY CUSTOM DESIGN	0				
63477	10/08/18	742.28 003037		TYCO FIRE & SECURITY MGMT INC					
63478	10/08/18	53.33 007		UNITED PARCEL SERVICE					
63479	10/08/18	198.44 003093		UPS FREIGHT					
63480	10/08/18	192.00 003200		UPS STORE #1128					
63481	10/08/18	771.87 002829		VALLEY POWER SYSTEMS, INC.					
63482	10/08/18	122.37 001353		VISION COMMUNICATIONS					
63483	10/08/18	9,219.60 001043		VISION SERVICE PLAN					
63484	10/08/18	485.00 003237		WAREHOUSE DIRECT INTERIORS INC					
63485	10/08/18	6,844.43 001506		WESTERN STATES OIL CO.					
63486	10/08/18	1,187.56 001159		CAITTO'S GRAPHICS, INC.					
63487	10/15/18	882.90 003151		ABC BUS INC					
63488	10/15/18	2,145.00 003398		ADVANCED COMPUTER TECH SOL INC					
63489	10/15/18	4,388.16 001D		AT&T					

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63490	10/15/18	997.82 003105	AT&T MOBILITY		89328	8/19-9/18 OPS ELEV	139.80	
63491	10/15/18	47,293.88 001348	ATHENS INSURANCE SERVICE, INC.		89337	8/19-9/18 DAVENPORT	164.68	
63491	10/15/18	-47,293.88 001348	ATHENS INSURANCE SERVICE, INC.		89338	8/19-9/18 OCEAN	280.69	
63492	10/15/18	4,350.50 002035	BOWMAN & WILLIAMS INC		89219	8/24-9/23 BUS WIFI	997.82	
63493	10/15/18	26,136.21 588	CALTIP		89256	OCT 18 TPA FEES	4,927.41	VOIDED
63494	10/15/18	149.77 667	CITY OF SCOTT'S VALLEY		89266	SEPT 18 W/C REPLENIS	42,366.47	
63495	10/15/18	24,956.39 001124	CLEAN ENERGY		89256	OCT 18 TPA FEES	-4,927.41	**VOID
63496	10/15/18	1,532.76 075	COAST PAPER & SUPPLY INC.		89266	SEPT 18 W/C REPLENIS	-42,366.47	
63497	10/15/18	2,895.50 508	COMPLETE COACH WORKS INC		89246	AUG18 GENERATOR MAST	4,350.50	
63498	10/15/18	76.76 002063	COSTCO		89289	SEPT 18 CODE=5100	26,136.21	
63499	10/15/18	81.00 003016	COUNTY OF SANTA CRUZ HEALTH		89302	7/15-9/15 SEWER SVTC	149.77	
63500	10/15/18	1,136.00 700	CPS - HUMAN RESOURCE SERVICES		89273	LNG 9/4/18	5,962.91	
63501	10/15/18	149,588.02 002814	CREATIVE BUS SALES, INC.		89274	LNG 9/6/18	5,394.48	
63502	10/15/18	2,617.21 003116	CUMMINS PACIFIC LLP		89275	LNG 9/10/18	7,490.43	
63503	10/15/18	3,922.50 916	DOCTORS ON DUTY MEDICAL CLINIC		89276	LNG 9/12/18	6,108.57	
63504	10/15/18	6,116.56 003274	EAST BAY TIRE CO.		89303	CUSTODIAL SUPPLIES	212.55	
63505	10/15/18	50.00 298	ERGOMETRICS& APPLIED PERSONNEL		89336	INVENTORY ORDER	1,320.21	
63506	10/15/18	3,669.70 432	EXPRESS SERVICES INC.		89220	RPR VEH #9830	2,895.50	
63507	10/15/18	836.96 002962	FIS		89330	MEETING SUPPLIES	76.76	
63508	10/15/18	21.56 002952	FLYERS ENERGY LLC		89288	AUG 18 SERVICES	81.00	
					89262	CLASS & COMP TRAININ	284.00	
					89263	CLASS & COMP TRAININ	284.00	
					89264	CLASS & COMP TRAININ	284.00	
					89265	CLASS & COMP TRAININ	284.00	
					89291	NEW VEH #1704 PC	74,794.01	
					89292	NEW VEH #1707 PC	74,794.01	
					89248	INVENTORY ORDER	2,626.05	
					89249	RPR VEH #2310	30.30	
					89250	INVENTORY ORDER	15.36	
					89293	CREDIT	-54.50	
					89290	DOT DRUG TESTS/EXAMS	3,922.50	
					89238	TIRES	979.10	
					89239	TIRES	750.04	
					89240	TIRES	979.10	
					89241	TIRES	253.16	
					89242	TIRES	516.80	
					89247	TIRES	1,612.98	
					89304	TIRES	516.80	
					89305	TIRES	508.58	
					89259	PRE-EMPLOYMENT TEST	50.00	
					89232	TEMP W/E 9/23/18	1,094.40	
					89233	TEMP W/E 9/23/18	212.80	
					89297	TEMP W/E 9/23/18	1,080.00	
					89298	TEMP W/E 9/16/18	1,282.50	
					89278	AUG 18 MERCHANT FEES	836.96	
					89301	PROPANE	21.56	

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63509	10/15/18	9,461.57 001302	9,461.57	GARDA CL WEST, INC.		89258	OCT 18 SERVICES	298.00	
63510	10/15/18	276.67 282	276.67	GRAINGER		89277	OCT 18 VAULT SERVICE	9,163.57	
63511	10/15/18	2,120.01 166	2,120.01	HOSE SHOP, THE INC		89311	PALLET JACK WHEELS	97.94	
63512	10/15/18	16,315.75 002979	16,315.75	HUNT & SONS, INC.		89313	INVENTORY ORDER	105.89	
63513	10/15/18	455.29 003413	455.29	J. J. KELLER & ASSOCIATES INC		89326	TOOL REPLACEMENT	66.06	
63514	10/15/18	1,270.15 1117	1,270.15	KELLEY'S SERVICE INC.		89327	PAINT MARKERS	6.78	
63515	10/15/18	23,627.38 003366	23,627.38	KEY GOVERNMENT FINANCE INC		89223	INVENTORY ORDER	2,120.01	
63516	10/15/18	1,003.00 852	1,003.00	LAW OFFICES OF MARIE F. SANG	7	89221	INVENTORY ORDER	12,576.56	
63517	10/15/18	12,000.00 003388	12,000.00	LEWIS PESTRAK		89222	INVENTORY ORDER	3,739.19	
63518	10/15/18	-12,000.00 003388	-12,000.00	LEWIS PESTRAK		89287	TRAINING DVD SUSPICI	455.29	
63519	10/15/18	157.36 003059	157.36	MAILFINANCE INC		89308	INVENTORY ORDER	106.57	
63520	10/15/18	261.26 041	261.26	MISSION UNIFORM		89324	INVENTORY ORDER	637.93	
63521	10/15/18	1,983.00 469	1,983.00	MONTEREY BAY AIR RESOURCES		89331	INVENTORY ORDER	40.00	
63522	10/15/18	1,740.92 001064	1,740.92	MUNICIPAL MAINTENANCE EQUIPMNT		89332	CREDIT	-17.44	
63523	10/15/18	200.00 003061	200.00	NEOFUNDS BY NEOPOST DBA		89244	OCT 18 LEASE	23,627.38	
63524	10/15/18	109.98 002721	109.98	NEXTEL COMMUNICATIONS/SPRINT		89255	CL# 17001199	1,003.00	VOIDED
63525	10/15/18	22,295.81 009	22,295.81	PACIFIC GAS & ELECTRIC		89329	C/S CUBICLES	12,000.00	VOIDED
63526	10/15/18	84.33 043	84.33	PALACE ART & OFFICE SUPPLY		89272	9/28-10/27 LEASE	157.36	**VOID
63527	10/15/18	204.40 003020	204.40	QUEST DIAGNOSTIC INC.		89299	LAUNDRY SERVICE	30.50	
63528	10/15/18	449.00 061	449.00	REGISTER PAJARONIAN LLC		89333	CUSTODIAL SUPPLIES	19.00	
63529	10/15/18	37.05 003024	37.05	RICOH USA, INC CA		89334	LAUNDRY SERVICE	181.76	
63530	10/15/18	165.06 135	165.06	SANTA CRUZ AUTO PARTS, INC.		89335	LAUNDRY SERVICE	181.76	
63531	10/15/18	489.00 002700	489.00	SANTA CRUZ COUNTY ENVIROMENTAL		89336	CUSTODIAL SUPPLIES	30.00	
63532	10/15/18	240.00 001292	240.00	SANTA CRUZ RECORDS MNGMT INC		89236	AIR POLLUTION PERMIT	1,983.00	
63533	10/15/18	16,503.00 003365	16,503.00	SHUTTLE BUS LEASING CORP		89234	LIFT INSPECTION	1,740.92	
63534	10/15/18	332.31 115	332.31	SNAP-ON INDUSTRIAL		89268	****-****-****-1598	200.00	
		438.95 001232	438.95	SPECIALIZED AUTO AND		89231	8/26-9/25 OPS	109.98	
						89226	8/23-9/23 1122 RIVER	2,199.02	
						89227	8/28-9/26 1200 RIVER	3,659.08	
						89228	8/28-9/26 PACIFIC	2,979.51	
						89229	8/23-9/23 VERNON	6,738.44	
						89230	8/23-9/23 GOLF CLUB	6,719.76	
						89296	OFFICE SUPPLIES	84.33	
						89257	SEP18 DOT DRUG TESTS	204.40	
						89295	LEGAL AD	449.00	
						89282	6/24-9/23 IMAGES GOL	37.05	
						89322	INVENTORY ORDER	90.91	
						89323	INVENTORY ORDER	74.15	
						89237	HEALTH PERMIT	489.00	
						89235	SEPT 18 SHREDDING	240.00	
						89243	9/22-10/21 ARTIC LEA	16,503.00	
						89251	TOOL REPLACEMENT	332.31	
						89309	SMOG VEH #1125 PC	49.85	
						89316	SMOG VEH #603	49.85	
						89317	SMOG VEH #708	41.75	

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63535	10/15/18	975.51 001976	SPORTWORKS NORTHWEST, INC.			89318	SMOG VEH #101	49.85	
						89319	SMOG VEH #908	71.75	
						89320	SMOG VEH #1106 PC	87.95	
						89321	SMOG VEH #2604 PC	87.95	
						89252	INVENTORY ORDER	50.53	
						89253	INVENTORY ORDER	924.98	
						89281	INVENTORY ORDER	1,471.50	
						89294	RPR ELECTRONIC PARTS	1,057.30	
						89267	HR DIRECTOR RECRUITM	3,965.70	
						89279	RPR FORKLIFT #704	117.00	
						89280	RPR FORKLIFT #701	155.03	
						89254	RPR VEH #1001	18.81	
						89269	INVENTORY ORDER	45.43	
						89270	INVENTORY ORDER	90.42	
						89285	INVENTORY ORDER	290.17	
						89286	RPR VEH #1001	77.01	
						89314	RPR VEH #2810	62.82	
						89315	INVENTORY ORDER	988.46	
						89225	FREIGHT	41.91	
						89224	FREIGHT	466.05	
						89283	INVENTORY ORDER	4,401.99	
						89284	INVENTORY ORDER	1,177.20	
						89306	RPR VEH #2235	80.19	
						89307	INVENTORY ORDER	1,528.17	
						89300	INVENTORY ORDER	107.37	
						89260	DRUG SCREEN	20.00	
						89339	OCT 18 TPA FEES	4,927.41	
						89340	SEPT 18 W/C REPLENIS	42,366.47	
						89391	EXCEL 2 TRAINING	2,145.00	
						89343	RELOCATE THERMOSTAT	659.29	
						89445	RPR HVAC MMF	170.00	
						89446	HVAC MAINT VERNON	991.52	
						89449	AUG 18 MAINTENANCE	247.00	
						89454	AUG 18 MAINT OPS	2,900.00	
						89455	AUG 18 MAINT MMF	917.00	
						89456	AUG 18 MAINT WTC	392.00	
						89341	LUNCH MEETING	56.55	
						89447	TRAVEL REIMBURSEMENT	1,386.01	
						89453	PEST CONTROL VERNON	225.00	
						89358	AUG18 GENERATOR PROJ	4,783.00	
						89356	AUDIT FY18	15,000.00	
						89370	JUL-SEP18 DIESEL TAX	223.00	
						89375	OFFICE SUPPLIES	125.35	
						89342	LANDFILL	226.33	
						89402	STORM WATER CHARGE	3,039.68	
						89403	FY19 PARK DEF FEE	637.50	
63540	10/15/18	41.91 007	UNITED PARCEL SERVICE						
63541	10/15/18	466.05 003093	UPS FREIGHT						
63542	10/15/18	7,187.55 002829	VALLEY POWER SYSTEMS, INC.						
63543	10/15/18	107.37 001353	VISION COMMUNICATIONS						
63544	10/15/18	20.00 003290	WORKFORCEQA LLC						
63545	10/15/18	4,927.41 001348	ATHENS INSURANCE SERVICE, INC.						
63546	10/15/18	42,366.47 002917	SANTA CRUZ METRO TRANSIT W/C						
63547	10/22/18	2,145.00 003398	ADVANCED COMPUTER TECH SOL INC						
63548	10/22/18	6,276.81 382	AIRTEC SERVICE INC.						
63549	10/22/18	1,442.56 E437	AITKEN, ANGELA						
63550	10/22/18	225.00 003405	ANIMAL DAMAGE MANAGEMENT INC						
63551	10/22/18	4,783.00 002035	BOWMAN & WILLIAMS INC						
63552	10/22/18	15,000.00 616	BROWN ARMSTRONG ACCOUNTANCY						
63553	10/22/18	223.00 080A	CALIFORNIA DEPARTMENT OF TAX						
63554	10/22/18	125.35 914	CALTRONICS BUSINESS SYSTEMS						
63555	10/22/18	4,116.01 001346	CITY OF SANTA CRUZ-FINANCE						

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63556	10/22/18	6,473.55 909	6,473.55	CLASSIC GRAPHICS		89404	FY19 PARK DEF FEE	212.50	
63557	10/22/18	42,454.50 001124	4,897.02	CLEAN ENERGY		89357	REPAINT VEH #9824	6,473.55	
			7,539.73			89359	LNG 9/14/18	4,897.02	
			14,842.00			89360	LNG 9/18/18	7,539.73	
			333.75			89368	AUG 18 MAINTENANCE	14,842.00	
			14,842.00			89405	RPR LNG TANK #1	333.75	
			109.00	COAST PAPER & SUPPLY INC.		89406	SEPT 18 MAINTENANCE	14,842.00	
63558	10/22/18	109.00 075	109.00			89439	INVENTORY ORDER	109.00	
63559	10/22/18	3,881.94 003116	59.42	CUMMINS PACIFIC LLP		89361	RPR VEH #2310	59.42	
			16.82			89362	INVENTORY ORDER	16.82	
			2,897.25			89421	RPR VEH #1204	2,897.25	
			908.45			89422	RPR VEH #2808	908.45	
			1,097.44	DAY WIRELESS SYSTEMS		89398	AUG 18 MAINTENANCE	1,097.44	
63560	10/22/18	1,097.44 002946	1,367.00	DEANE INDUSTRIAL MACHINING		89401	INVENTORY ORDER	1,367.00	
63561	10/22/18	1,367.00 002949	1,111.99	EAST BAY TIRE CO.		89363	TIRES	1,111.99	
63562	10/22/18	4,237.39 003274	979.10			89364	TIRES	979.10	
			1,017.15			89365	TIRES	1,017.15	
			1,129.15			89366	TIRES	1,129.15	
63563	10/22/18	109.53 104	109.53	EDWARD J PARRAS	0	89425	OIL DISPENSER MOUNTS	109.53	
63564	10/22/18	1,920.00 432	384.00	EXPRESS SERVICES INC.		89394	TEMP W/E 9/16/18	384.00	
			1,536.00			89395	TEMP W/E 8/26/18	1,536.00	
63565	10/22/18	1.57 001297	1.57	FASTENAL COMPANY INC		89378	9/16-9/30 FUEL PC	1.57	
63566	10/22/18	13,278.80 002952	103.25	FLYERS ENERGY LLC		89377	RPR VEH #2800	103.25	
			2,952.83			89399	9/16-9/30 FUEL	2,952.83	
63567	10/22/18	103.55 001189	103.55	GARY KENVILLE LOCKSMITH	7	89407	MASTER KEYS	103.55	
63568	10/22/18	38.78 117	38.78	GILLIG LLC		89420	RPR VEH #1501 PC	38.78	
63569	10/22/18	268.50 282	246.10	GRAINGER		89423	RPR AIR COMPRESSOR	246.10	
			3.32			89434	BATTERY	3.32	
63570	10/22/18	870.89 001097	19.08	GREENWASTE RECOVERY, INC.		89438	INVENTORY ORDER	19.08	
			51.88			89379	SEPT 18 WASTE GRNVLV	51.88	
			51.88			89380	SEP18 WASTE SOQ COTT	51.88	
			51.88			89381	SEP18 WASTE SOQ COTT	51.88	
			51.88			89382	SEP18 WASTE FREEDOM	51.88	
			155.64			89383	SEP18 WASTE FREE BOW	155.64	
			51.88			89384	SEP18 WASTE HWY9 BC	51.88	
			51.88			89385	SEP18 WASTE AIR-FREE	51.88	
			51.88			89386	SEP18 WASTE BRASIN	51.88	
			51.88			89387	SEP18 WASTE LOMOND	51.88	
			21.72			89415	SEPT 18 WASTE MTHERM	21.72	
			278.49			89416	SEPT 18 WASTE SVT	278.49	
63571	10/22/18	16,112.65 001745	5,438.47	HARTFORD LIFE AND ACCIDENT INS		89412	OCT 18 LIFE AD&D	5,438.47	
			10,674.18			89413	OCT 18 LTD	10,674.18	
63572	10/22/18	738.63 003327	-16.35	IO, RODNEY H		89352	RPR VEH #602	-16.35	
63573	10/22/18	420.68 1117	-32.70	KELLEY'S SERVICE INC.		89351	CREDIT	-32.70	
			123.82			89400	CREDIT	123.82	
						89440	RPR VEH #401		

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63574	10/22/18	003271	324.00	KJRB INC		89441	RPR VEH #401	3.27	
63575	10/22/18	003293	480.00	MAKAL SOLUTIONS		89442	RPR VEH #2406	264.75	
63576	10/22/18	001330	2,030.00	MAXIM HEALTH SYSTEMS, LLC		89443	INVENTORY ORDER	77.89	
63577	10/22/18	003273	2,066.00	MGP XI REIT LLC		89435	TOWING VEH #2222	324.00	
63578	10/22/18	001052	2,106.71	MID VALLEY SUPPLY INC.		89390	INSPECT BAY #9	480.00	
63579	10/22/18	041	330.17	MISSION UNIFORM		89408	FLU SHOTS	2,030.00	
						89393	NOV 18 RENT	2,066.00	
						89437	INVENTORY ORDER	2,106.71	
						89354	LAUNDRY SERVICE	32.50	
						89424	CUSTODIAL SUPPLIES	30.00	
						89431	CUSTODIAL SUPPLIES	50.00	
						89432	LAUNDRY SERVICE	207.17	
						89448	CUSTODIAL SUPPLIES	10.50	
63580	10/22/18	004	4,996.51	NORTH BAY FORD LINC-MERCURY		89373	RPR VEH #1111 PC	4,473.73	
						89374	RPR VEH #1111 PC	322.99	
						89433	INVENTORY ORDER	199.79	
63581	10/22/18	009	3,001.97	PACIFIC GAS & ELECTRIC		89388	9/4-10/2 SVT WTC PNR	2,936.79	
						89389	9/4-10/2 SVTC TENANT	65.18	
63582	10/22/18	023	34.12	PACIFIC TRUCK PARTS, INC.		89344	INVENTORY ORDER	139.87	
						89345	INVENTORY ORDER	556.43	
						89346	CREDIT	-662.18	
63583	10/22/18	043	558.53	PALACE ART & OFFICE SUPPLY		89355	OFFICE SUPPLIES	558.53	
63584	10/22/18	002947	1,690.00	PEDALERS EXPRESS	7	89409	SEPT 18 COURIER SVC	1,690.00	
63585	10/22/18	002939	36,008.10	PREFERRED BENEFIT		89414	OCT 18 DENTAL	36,008.10	
63586	10/22/18	107A	257.39	PROBUILD COMPANY LLC		89427	RPR PLUMBING VERNON	12.32	
						89428	ROOF PATCH MMF	87.19	
						89429	REMODEL TAQUERIA	58.84	
						89430	REMODEL TAQUERIA	99.04	
63587	10/22/18	001153	593.25	REPUBLIC ELEVATOR COMPANY INC		89426	OCT 18 ELEVATOR MAIN	593.25	
63588	10/22/18	003024	1,768.83	RICOH USA, INC CA		89350	OCT 18 COPIER OPS	110.17	
						89450	9/14-10/13 PARACRUZ	66.66	
63589	10/22/18	003154	2,433.47	ROMAINE ELECTRIC CORP		89347	INVENTORY ORDER	2,714.10	
						89348	CREDIT	-539.55	
						89349	INVENTORY ORDER	258.92	
63590	10/22/18	135	152.16	SANTA CRUZ AUTO PARTS, INC.		89444	INVENTORY ORDER	152.16	
63591	10/22/18	848	37.70	SANTA CRUZ ELECTRONICS, INC.		89376	OFFICE SUPPLIES	37.70	
63592	10/22/18	001292	80.00	SANTA CRUZ RECORDS MNGMT INC		89451	SEPT 18 SHREDDING PC	80.00	
63593	10/22/18	003411	7,200.00	SCIQUEST INC		89371	10/1-9/30/19 MAINTEN	7,200.00	
63594	10/22/18	002267	2,500.00	SHAW / YODER / ANTWIH, INC.		89410	OCT 18 LEGISLATE SVC	2,500.00	
63595	10/22/18	001075	16,288.68	SOQUEL III ASSOCIATES	7	89392	NOV 18 RENT	16,288.68	
63596	10/22/18	001232	99.70	SPECIALIZED AUTO AND		89353	SMOG VEH #602	49.85	
						89436	SMOG VEH #717	49.85	
63597	10/22/18	003285	207.73	TRANSIT HOLDINGS INC		89417	INVENTORY ORDER	8.71	
63598	10/22/18	003037	466.37	TYCO FIRE & SECURITY MGMT INC		89418	INVENTORY ORDER	199.02	
63599	10/22/18	002829	1,963.29	VALLEY POWER SYSTEMS, INC.		89452	11/1-1/31/19 MMF	466.37	
						89367	INVENTORY ORDER	1,200.17	

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63600	10/22/18	2,681.03	221	VEHICLE MAINTENANCE PROG INC	89372	0	89372	INVENTORY ORDER	752.11	
63601	10/22/18	221.54	434	VERIZON WIRELESS	89396		89396	INVENTORY ORDER	1,850.39	
63602	10/22/18	275.00	003316	WATER TECH SPECIALTIES INC	89419		89419	CREDIT	-1,839.38	
63603	10/19/18	850.00	E1013	RUDDICK, SHONOA	89457		89457	INVENTORY ORDER	2,681.03	
63604	10/19/18	33,000.00	002917	SANTA CRUZ METRO TRANSIT W/C	89411		89411	9/2-10/1 POINT2POINT	221.54	
63605	10/22/18	16,650.08	003388	LEWIS PESTRAK	89458		89458	SEP 18 CHEM TEST	275.00	
63606	10/29/18	615.43	003151	ABC BUS INC	89459		89459	TRAVEL ADVANCE	850.00	
					89460		89460	W/C REPLENISHMENT	33,000.00	
					89465		89465	CALL CENTER CUBICLES	16,650.08	
					89532		89532	INVENTORY ORDER	102.91	
					89533		89533	INVENTORY ORDER	34.57	
63607	10/29/18	207.00	382	AIRTEC SERVICE INC.	89497		89497	INVENTORY ORDER	477.95	
63608	10/29/18	200.00	001016	ALLARD'S SEPTIC SERVICE	89497		89497	AUG18 HVAC MAINT	207.00	
63609	10/29/18	626.62	192	ALWAYS UNDER PRESSURE	89501	7	89501	HAZARDOUS WASTE	200.00	
					89556		89556	MAINTENANCE SUPPLIES	17.96	
					89557		89557	MAINTENANCE SUPPLIES	608.66	
63610	10/29/18	573.33	001D	AT&T	89549		89549	SEP 18 WTC	573.33	
63611	10/29/18	995.00	080	CALIFORNIA DEPARTMENT OF TAX	89468		89468	JUL-SEP 18 SALES TAX	995.00	
63612	10/29/18	1,760.35	914	CALTRONICS BUSINESS SYSTEMS	89499		89499	OFFICE SUPPLIES	717.22	
					89579		89579	OFFICE SUPPLIES	477.42	
					89580		89580	OFFICE SUPPLIES	125.35	
					89581		89581	OFFICE SUPPLIES	440.36	
63613	10/29/18	88.90	M022	CAPELLA, KATHLEEN	89609	0	89609	NOV 18 RETIREEE SUP	88.90	
63614	10/29/18	24,686.74	001124	CLEAN ENERGY	89517		89517	LNG 9/24/18	7,735.43	
					89518		89518	LNG 9/26/18	6,473.82	
					89519		89519	LNG 9/28/18	5,448.27	
					89529		89529	LNG 9/20/18	5,029.22	
63615	10/29/18	1,336.83	075	COAST PAPER & SUPPLY INC.	89470		89470	CUSTODIAL SUPPLIES	1,336.83	
63616	10/29/18	2,890.00	003034	COASTAL LANDSCAPING INC. DBA	89577		89577	OCT 2018 LANDSCAPING	2,890.00	
63617	10/29/18	61.63	002063	COSTCO	89582		89582	BOTTLED WATER	61.63	
63618	10/29/18	523,558.07	002814	CREATIVE BUS SALES, INC.	89502		89502	NEW VEH #1702 PC	74,794.01	
					89503		89503	NEW VEH #1710 PC	74,794.01	
					89504		89504	NEW VEH #1703 PC	74,794.01	
					89505		89505	NEW VEH #1705 PC	74,794.01	
					89506		89506	NEW VEH #1706 PC	74,794.01	
					89507		89507	NEW VEH #1709 PC	74,794.01	
					89508		89508	NEW VEH #1711 PC	74,794.01	
63619	10/29/18	12,022.14	003116	CUMMINS PACIFIC LLP	89472		89472	INVENTORY ORDER	1,626.06	
					89473		89473	INVENTORY ORDER	4,187.57	
					89474		89474	RPR VEH #2310	31.15	
					89475		89475	RPR VEH #1202	176.15	
					89596		89596	INVENTORY ORDER	6,001.21	
63620	10/29/18	160.00	002567	DEPARTMENT OF JUSTICE	89478		89478	SEP 18 FINGERPRINTS	160.00	
63621	10/29/18	4,610.50	003274	EAST BAY TIRE CO.	89478		89478	TIRES	501.37	
					89520		89520	TIRES	2,071.65	
					89530		89530	TIRES	1,018.74	

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63622	10/29/18	490	2,500.00	FAST RESPONSE ON-SITE		89531	TIRES	1,018.74	
63623	10/29/18	002295	800.00	FIRST ALARM		89511	RESPIRATOR TRAINING	2,500.00	
63624	10/29/18	002962	1,051.99	FIS		89509	SEP 18 SECURITY OPS	800.00	
63625	10/29/18	001189	362.60	GARY KENVILLE LOCKSMITH	7	89608	SEPT 18 MERCHANT FEE	1,051.99	
63626	10/29/18	647	1,080.00	GENFARE A DIV OF SPX CORP		89513	RPR LOCK	362.60	
						89491	RPR PEM #47552	540.00	
						89492	RPR PEM #46651	540.00	
63627	10/29/18	117	12,252.62	GILLIG LLC		89476	WHEEL REPLACEMENTS	11,554.00	
						89477	INVENTORY ORDER	698.62	
63628	10/29/18	M041	44.45	GOUVEIA, ROBERT	0	89603	NOV 18 RETIREE SUP	44.45	
63629	10/29/18	282	1,505.21	GRAINGER		89471	CUSTODIAL SUPPLIES	99.80	
						89515	INVENTORY ORDER	134.88	
						89516	PAINT MARKER YELLOW	58.21	
						89559	MAINTENANCE SUPPLIES	349.55	
						89563	CUSTODIAL SUPPLIES	157.02	
						89564	CUSTODIAL SUPPLIES	54.10	
						89565	CUSTODIAL SUPPLIES	88.97	
						89566	TRAFFIC CONES	176.84	
						89567	INVENTORY ORDER	385.84	
63630	10/29/18	001097	319.01	GREENWASTE RECOVERY, INC.		89593	SEPT 18 WASTE PC	319.01	
63631	10/29/18	003109	32,467.35	HANSON BRIDGETT LLP		89480	M# 032117.008002	77.00	
						89481	M# 032117.008001	808.50	
						89482	M# 032117.006010	2,582.90	
						89483	M# 032117.006008	3,000.00	
						89484	M# 032117.006006	868.00	
						89485	M# 032117.006004	310.00	
						89486	M# 032117.006003	214.50	
						89487	M# 032117.006001	350.50	
						89488	M# 032117.003001	255.95	
63632	10/29/18	166	626.00	HOSE SHOP, THE INC		89489	SEPT 18 RETAINER	24,000.00	
63633	10/29/18	003284	69.00	KEISH ENVIRONMENTAL PC CORP		89500	RPR BUS STEAM CLNR	626.00	
63634	10/29/18	1117	1,011.89	KELLEY'S SERVICE INC.		89495	SEPT 18 OUTFALL MIT	69.00	
						89543	INVENTORY ORDER	998.82	
						89568	INVENTORY ORDER	13.07	
63635	10/29/18	001233	56.68	KIMBALL MIDWEST		89538	NON INVENTORY ORDER	56.68	
63636	10/29/18	003059	208.78	MAILFINANCE INC		89610	11/3-2/2/19 LEASE PC	208.78	
63637	10/29/18	001145	686.25	MANAGED HEALTH NETWORK		89469	NOV 18 EAP	686.25	
63638	10/29/18	003017	21,443.03	MANSFIELD OIL CO OF GAINSVILLE		89464	DIESEL 10/04/18	21,443.03	
63639	10/29/18	003249	215.00	MAXIMUM OIL SERVICE LLC		89514	WASTE OIL PICKUP	215.00	
63640	10/29/18	001052	2,117.27	MID VALLEY SUPPLY INC.		89546	CUSTODIAL SUPPLIES	2,117.27	
63641	10/29/18	003397	1,090.00	MISSION FLOORS INC		89571	CARPET SMC CALL CTR	695.00	
						89572	RPR FLOOR OPS	395.00	
63642	10/29/18	041	310.17	MISSION UNIFORM		89493	CUSTODIAL SUPPLIES	10.50	
						89547	CUSTODIAL SUPPLIES	30.00	
						89553	LAUNDRY SERVICE	30.50	
						89569	CUSTODIAL SUPPLIES	50.00	

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63643	10/29/18	003326	460.63	NIDAL HALABI & NADA ALGHARIB		89570	LAUNDRY SERVICE	189.17	
63644	10/29/18	003416	119.00	NNA SERVICES, LLC		89498	BADGES	460.63	
63645	10/29/18	002940	185.00	OJO TECHNOLOGY, INC.		89591	10/1-9/30/20 MERSHIP	119.00	
63646	10/29/18	003214	459.69	ORTEGA'S CENTRAL COAST BUDGET		89490	PROG/CONFIG CAMERA	185.00	
63647	10/29/18	003214	2,210.76	PALACE ART & OFFICE SUPPLY		89554	BLINDS PACIFIC ST CS	459.69	
						89496	OFFICE SUPPLIES	90.56	
						89542	OFFICE SUPPLIES	89.88	
						89558	OFFICE SUPPLIES	554.53	
						89561	OFFICE SUPPLIES	391.53	
						89573	OFFICE SUPPLIES	176.06	
						89574	OFFICE SUPPLIES	908.20	
63648	10/29/18	M109	44.45	PEREZ, CHERYL		89604	NOV 18 RETIREE SUP	44.45	
63649	10/29/18	001149	1,195.00	PREFERRED PLUMBING, INC.		89578	RPR PLUMBING PC	1,195.00	
63650	10/29/18	107A	234.64	PROBUILD COMPANY LLC		89583	RPR CALL CENTER	7.84	
						89584	OIL DISPENSER MOUNTS	30.21	
						89585	RPR SERVICE BUILDING	35.34	
						89586	MAINTENANCE SUPPLIES	10.25	
						89587	RPR CALL CENTER	21.12	
						89588	RPR SMC RESTROOM	94.63	
						89589	RPR CALL CENTER	16.70	
						89590	RPR SMC RESTROOM	18.55	
63651	10/29/18	003266	845.15	REFLECTIVE APPAREL FACTORY INC		89550	VESTS/RAINGEAR FLEET	845.15	
63652	10/29/18	215	267.05	RICOH USA, INC. TX		89479	10/3-11/2 LEASE CS	267.05	
63653	10/29/18	003154	2,439.55	ROMAINE ELECTRIC CORP		89605	INVENTORY ORDER	2,439.55	
63654	10/29/18	M085	88.90	ROSSI, DENISE	0	89544	NOV 18 RETIREE SUP	88.90	
63655	10/29/18	M030	44.45	ROWE, RUBY		89606	NOV 18 RETIREE SUP	44.45	
63656	10/29/18	003409	459.00	RUSSELL S JONES		89510	RPR OPS SEC GATES	459.00	
63657	10/29/18	135	62.92	SANTA CRUZ AUTO PARTS, INC.		89545	INVENTORY ORDER	62.92	
63658	10/29/18	079	1,865.99	SANTA CRUZ MUNICIPAL UTILITIES		89594	8/14-9/12 PARACRUZ	1,865.99	
63659	10/29/18	003098	208.12	SPARTAN DAILY		89555	SJSU TIX ADVERTISING	208.12	
63660	10/29/18	001232	287.35	SPECIALIZED AUTO AND		89528	SMOG VEH #1122 PC	87.95	
						89534	SMOG VEH #203 PC	49.85	
						89535	SMOG VEH #501	49.85	
						89536	SMOG VEH #1127 PC	49.85	
						89537	SMOG VEH #401	49.85	
63661	10/29/18	001976	1,516.35	SPORTWORKS NORTHWEST, INC.		89548	INVENTORY ORDER	1,516.35	
63662	10/29/18	003285	4,776.30	TRANSIT HOLDINGS INC		89466	RPR VEH #1209	38.64	
						89467	RPR VEH #9806	54.92	
						89522	INVENTORY ORDER	20.62	
						89523	INVENTORY ORDER	602.59	
						89524	INVENTORY ORDER	230.73	
						89525	RPR VEH #1202	105.20	
						89526	RPR VEH #1611	90.29	
						89539	INVENTORY ORDER	3,230.38	
						89540	INVENTORY ORDER	199.02	
						89541	INVENTORY ORDER	1.14	

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63663	10/29/18	796.39 003037		TYCO FIRE & SECURITY MGMT INC		89597	CREDIT	-517.21	
63664	10/29/18	75.83 007		UNITED PARCEL SERVICE		89598	INVENTORY ORDER	256.56	
63665	10/29/18	86.23 002829		VALLEY POWER SYSTEMS, INC.		89599	INVENTORY ORDER	196.72	
63666	10/29/18	912.24 434		VERIZON WIRELESS	0	89600	INVENTORY ORDER	266.70	
63667	10/29/18	276.48 002291		WINCHESTER AUTO		89601	INVENTORY ORDER	153.94	
63668	10/29/18	44.45 M088		YAGI, RANDY	0	89602	INVENTORY ORDER	-153.94	
63669	10/29/18	234.86 147		ZEE MEDICAL SERVICE CO.		89463	11/1-1/31/19 OPS ALM	796.39	
63670	10/29/18	12,771.44 057		U.S. BANK		89512	FREIGHT	63.04	
TOTAL		1,661,888.14		ACCOUNTS PAYABLE		89595	FREIGHT	12.79	
						89521	INVENTORY ORDER	263.76	
						89562	CORE CREDIT	-177.53	
						89560	9/13-10/12 WIFI BUS	912.24	
						89527	INVENTORY ORDER	276.48	
						89607	NOV 18 RETIREE SUP	44.45	
						89551	FIRST AID SUPPLIES	121.86	
						89552	FIRST AID SUPPLIES	81.25	
						89592	FIRST AID SUPPLIES	31.75	
						89659	9/24/ STMT	12,771.44	
						TOTAL CHECKS	297	1,661,888.14	



DATE: November 16, 2018
TO: Board of Directors
FROM: Alex Clifford, CEO/General Manager
SUBJECT: ACCEPT AND FILE MINUTES FROM THE OCTOBER 26, 2018 BOARD OF DIRECTORS MEETING AND NOVEMBER 9, 2018 PERSONNEL/HR STANDING COMMITTEE MEETING

I. RECOMMENDED ACTION

That the Board of Directors Accept and File the Minutes of the October 26, 2018 Board of Directors Meeting and the November 9, 2018 Personnel/HR Standing Committee Meeting

II. SUMMARY

- Staff is providing minutes from the Santa Cruz Metropolitan Transit District (METRO) Board of Directors Regular Meeting of October 26, 2018 and the Personnel/HR Standing Committee Meeting of November 9, 2018.
- Each meeting staff will provide minutes from the previous METRO Board of Directors meetings.

III. DISCUSSION/BACKGROUND

The Board requested that staff include, in the Board Packet, minutes from previous METRO Board of Directors meetings. Staff is enclosing the minutes from these meetings.

IV. FINANCIAL CONSIDERATIONS/IMPACT

None.

V. ALTERNATIVES CONSIDERED

None.

VI. ATTACHMENTS

Attachment A: Draft minutes for the Board of Directors Regular Meeting of October 26, 2018

Attachment B: Draft minutes for the Board of Directors Personnel/HR Standing Committee Meeting of November 9, 2018

Prepared by: Gina Pye, Executive Assistant

VII. APPROVALS

Alex Clifford, CEO/General Manager

A handwritten signature in blue ink, appearing to read "Alex Clifford", is written over a solid horizontal line. The signature is stylized and cursive.

Attachment A



**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (METRO)
BOARD OF DIRECTORS AGENDA MEETING MINUTES*
OCTOBER 26, 2018 – 9:00 AM
CAPITOLA CITY COUNCIL CHAMBERS
420 CAPITOLA AVENUE
CAPITOLA , CA 95010**

A regular meeting of the Board of Directors of the Santa Cruz Metropolitan Transit District (METRO) was convened on Friday, October 26, 2018 at the Capitola City Council Chambers, 420 Capitola Avenue, Capitola, CA.

The Board Meeting Agenda Packet can be found online at www.SCMTD.com and is available for inspection at Santa Cruz METRO's Administrative offices at 110 Vernon Street, Santa Cruz, California. *Minutes are "summary" minutes, not verbatim minutes. Audio recordings of Board meeting open sessions are available to the public upon request.

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@scmttd.com

SECTION I: OPEN SESSION

CALL TO ORDER at 9:04 AM by Chair McPherson.

EX-Officio Director, Alta Northcutt, was sworn in by Julie Sherman, General Counsel.

ROLL CALL: The following Directors were present, representing a quorum:

Director Ed Bottorff	City of Capitola
Director Cynthia Chase	City of Santa Cruz
Director Trina Coffman-Gomez	City of Watsonville
Director Jimmy Dutra	City of Watsonville
Director Norm Hagen	County of Santa Cruz
Director John Leopold	County of Santa Cruz
Director Donna Lind	City of Scotts Valley
Director Cynthia Mathews	City of Santa Cruz
Director Bruce McPherson	County of Santa Cruz
Director Dan Rothwell	County of Santa Cruz
Director Mike Rotkin	County of Santa Cruz
Ex-Officio Director Alta Northcutt	Cabrillo College
Ex-Officio Director Davon Thomas	UCSC

Ex-Officio Director Thomas and Director Rothwell were absent.

STAFF PRESENT:

Alex Clifford
Julie Sherman

METRO CEO/General Manager
METRO General Counsel

Attachment A

METRO EMPLOYEES AND MEMBERS OF THE PUBLIC WHO VOLUNTARILY INDICATED THEY WERE PRESENT (IN ALPHABETICAL ORDER) WERE:

Angela Aitken, SCTMD
Grace Blakeslee, RTC
Ross Clark, Public
Ginger Dykar, RTC
Wes Guild, SEIU
Joan Jeffries, SEIU

Sue Lisin, Public
Joseph Mata, SEIU
Kevin O'Conner, Public
Larry Pageler, UCSC
Peter Walz, Public

ANNOUNCEMENTS

Chair McPherson introduced Carlos Landaverry for his Spanish Language interpretation services. Mr. Landaverry announced his services in Spanish for the assembly. Chair McPherson also announced that the meeting is being televised by Community Television of Santa Cruz County with technician, Mr. Lynn Dunton.

BOARD OF DIRECTORS COMMENTS

Director Hagen expressed a need to recruit more Operators. CEO Clifford noted that a recruiting update is planned for later in today's meeting.

ORAL AND WRITTEN COMMUNICATIONS TO THE BOARD OF DIRECTORS

Hearing none, Chair McPherson moved to the next agenda item.

WRITTEN COMMUNICATIONS FROM MAC

Having none, Chair McPherson moved to the next agenda item.

LABOR ORGANIZATION COMMUNICATIONS

Hearing none, Chair McPherson moved to the next item.

ADDITIONAL DOCUMENTATION - distributed and available at the back of the room

- Agenda Item 12, Unified Corridor Investment Study Update Presentation
- Agenda Item 15, Job Fair Cards
- Agenda Item 17, October 17, 2018 Special Board Meeting Presentation
- Agenda Item 22, Public Comments Regarding Soquel Park and ride Received After 10/22/18
- News Clips

CONSENT AGENDA

9-01 RECOMMENDED ACTION ON TORT CLAIMS

9-02 ACCEPT AND FILE: PRELIMINARY APPROVED CHECK JOURNAL DETAIL FOR THE MONTH OF SEPTEMBER 2018

9-03 ACCEPT AND FILE MINUTES OF THE SEPTEMBER 28, 2018 BOARD OF DIRECTORS MEETING, OCTOBER 12, 2018 PERSONNEL/HR COMMITTEE MEETING AND OCTOBER 17, 2018 SPECIAL BOARD OF DIRECTORS MEETING

9-04 APPROVE: CONSIDERATION OF DECLARING VEHICLES AND/OR EQUIPMENT AS EXCESS FOR PURPOSES OF DISPOSAL OR AUCTION

There was no public comment.

Attachment A

ACTION: MOTION TO ACCEPT THE CONSENT AGENDA AS PRESENTED

MOTION: DIRECTOR ROTKIN

SECOND: DIRECTOR DUTRA

MOTION PASSED WITH 10 AYES (Directors Bottorff, Chase, Coffman-Gomez, Dutra, Hagen, Leopold, Lind, Mathews, McPherson and Rotkin) Director Rothwell was absent.

REGULAR AGENDA

10. PRESENTATION OF EMPLOYEE LONGEVITY AWARDS FOR PETE LEGORRETA (1988 – 2018, 30 years) AND ASCENCION SANCHEZ (1984 – 2018, 34 years)

Chair McPherson announced and congratulated the Messrs Legorreta and Sanchez for their years of service. Vice Chair Bottorff presented Mr. Legorreta with the plaque. Mr. Legorreta then made a few comments on his career with METRO.

11. PRESENTATION OF EMPLOYEE RETIREMENT RESOLUTIONS FOR LETICIA CALLEJAS, BUS OPERATOR (18 years) AND ELLYN PETERSON, BENEFITS ADMINISTRATOR (14 years)

Bruce McPherson, Board Chair, thanked everyone for his or her years of service in absentia.

ACTION: MOTION TO APPROVE THE RETIREMENT RESOLUTIONS FOR PETE LEGORRETA AND ASCENCION SANCHEZ AS PRESENTED

MOTION: DIRECTOR LEOPOLD

SECOND: DIRECTOR CHASE

MOTION PASSED WITH 10 AYES (Directors Bottorff, Chase, Coffman-Gomez, Dutra, Hagen, Leopold, Lind, Mathews, McPherson and Rotkin) Director Rothwell was absent.

12. ACCEPT AND FILE: UNIFIED CORRIDOR INVESTMENT STUDY UPDATE

Ginger Dykaar and Grace Blakeslee, Sr. Transportation Planners with the SCCRTC, spoke to the presentation and distributed one additional page of information to the board. (See attached.)

A number of questions were asked and answered between the Directors, RTC representatives and METRO staff. Directors asked questions regarding the options, scenarios, associated costs, rail support by METRO, etc. Ms. Dykaar noted this is an ongoing discussion within the community to ensure an informed decision is reached. She added more information is available [at their website](#); e.g., EIR, etc. Ms. Blakeslee noted public comments are still being received. The SCCRTC is working with METRO staff to prepare an additional appendix that will identify funding sources to facilitate the bus/rail discussion. It is anticipated 40% of the funding would be lost if Prop 6 passes. SCCRTC is working with METRO staff to coordinate bus/rail logistics.

CEO Clifford reminded the assembly that, depending on the outcome of Prop 6, the fare discussion may occur sooner rather than later.

Concerns and suggestions were discussed regarding creative thinking to embrace under-represented communities; i.e., outreach opportunities at the local churches, COPA in Watsonville, Spanish translators and translations on the website, etc.

Ms. Northcutt offered to work with METRO and the SCCRTC to involve the Cabrillo student population to increase ridership, spread the word about transportation, etc.

Public comment:

Ron Goodman expressed concerns that the study didn't properly analyze bus rapid transit (BRT) as it doesn't offer the flexibility needed. He'd prefer an operational study.

Attachment A

In response, Mr. Emerson said METRO continues to work with the SCCRTC regarding ridership issues, costs and resources. He plans to provide more detail at the November board meeting.

ACTION: MOTION TO ACCEPT AND FILE THE UNIFIED CORRIDOR INVESTMENT STUDY UPDATE AS PRESENTED

MOTION: DIRECTOR ROTKIN

SECOND: DIRECTOR DUTRA

MOTION PASSED WITH 10 AYES (Directors Bottorff, Chase, Coffman-Gomez, Dutra, Hagen, Leopold, Lind, Mathews, McPherson and Rotkin) Director Rothwell was absent.

13. CEO ORAL REPORT

Alex Clifford, CEO/General Manager, provided an oral update of various subjects, including: CARB update: The ICT has been revised to accept the FTA definition of large and small properties. If it is passed, METRO will be classified as a small property, which will provide more discretion for the purchase of electric buses. METRO will receive four Proterra buses before the zero emission deadline, in time to provide our Operators and mechanics training and to get operational experience. We need to collect our own data.

The CTA Fall Conference was a success. He and Ms. Alvey will follow up with a new PG&E contact regarding the PUC regulation that independently owned utilities must create funding to help transit properties with charging infrastructure for electric fleets.

Mr. Tom Hiltner, Grants/Legislative Analyst, will be retiring at the end of the year. Mr. Emerson introduced Mr. Wondimu Mengistu, his replacement. Mr. Mengistu said he was happy to be at METRO and looks forward to working with all stakeholders.

CEO Clifford announced the following new hires and promotions since the last board meeting:

New Hires:

Maria E. Padilla, Customer Service Representative
Brandon Dellis, Bus Operator
Scott Ivens, Bus Operator
Phylcia Mattos, Bus Operator
Oscar Gutierrez, FM Mechanic
Linda Lloyd, Sr. Accounting Technician
Wondimu Mengistu, Grants/Legislative Analyst
Michael Peno, Paratransit Operator
Valentin Rodriguez, FM Mechanic
Arturo Valdes, Custodial Service Worker

Promotions:

Idan Albarado, Promoted to Bus Operator
Ivan Garcia, Promoted to Bus Operator
Andrew Kearney, Promoted to Bus Operator
Alma Gutierrez, Promoted to Dispatcher/Scheduler

Attachment A

There was no public comment.

14. CONSIDERATION OF A RESOLUTION TO ESTABLISH THE BOARD OF DIRECTORS MEETING SCHEDULE & LOCATIONS FOR THE CALENDAR YEAR 2019

Alex Clifford, CEO/General Manager, spoke to the staff report and the two exhibits: Exhibit A schedules three meetings per year in Santa Cruz and Watsonville cities. Exhibit B schedules two meetings per year in Santa Cruz and Watsonville cities. Many other transit properties do not travel; they utilize a central location. METRO staff is recommending the adoption of Exhibit B as the more cost effective, time saving approach.

Board and staff discussion ensued regarding the pros and cons of meeting locations and frequency, cost savings, etc.

Director Leopold reminded the assembly that public meetings are held at various locations when required to solicit public input.

There was no public comment.

ACTION: MOTION TO ACCEPT AND APPROVE THE CALENDAR YEAR 2019 BOARD MEETING SCHEDULE AND LOCATIONS AS PRESENTED IN EXHIBIT B (TWO MEETINGS EACH IN THE CITIES OF SANTA CRUZ AND WATSONVILLE ANNUALLY) WITH A FRIENDLY AMENDMENT REQUESTING STAFF EXPLORE OFFSITE PARTICIPATION OPTIONS AND COST

MOTION: DIRECTOR ROTKIN

SECOND: DIRECTOR BOTTORFF

MOTION PASSED WITH 9 AYES (Directors Bottorff, Chase, Coffman-Gomez, Hagen, Leopold, Lind, Mathews, McPherson and Rotkin) Director Dutra opposed. Director Rothwell was absent.

15. RECEIVE: HUMAN RESOURCES DEPARTMENT RECRUITMENT UPDATE

Dawn Crummie, HR Deputy Director, spoke to the presentation and offered an English version of the La Ganga advertisement.

Board members provided several suggestions to aid in recruitment, including: adult education school outreach, Indeed.com, community action boards, day worker center, UCSC career center outreach, etc.

Ex-officio Director Northcutt invited METRO to participate in the October 29th College and Career Night at Cabrillo.

There was no public comment.

16. ORAL UPDATE ON EDUCATING THE PUBLIC ABOUT THE BENEFITS OF SENATE BILL 1

Barrow Emerson, Planning and Development Director, reminded the assembly of the potential financial loss if Proposition 6 is successful.

There was no public comment:

17. ORAL UPDATE ON OCTOBER 17, 2018 SPECIAL BOARD MEETING

Chair McPherson introduced the agenda item, expressing his appreciation to the staff.

Attachment A

Barrow Emerson, Planning and Development Director, spoke to the attached presentation.

There was no public comment:

18. ACCEPT AND FILE: THE YEAR TO DATE MONTHLY FINANCIAL REPORT AS OF JULY 2018

Angela Aitken, CFO, spoke to the presentation.

There was no public comment.

ACTION: MOTION TO ACCEPT AND FILE THE YEAR TO DATE MONTHLY FINANCIAL REPORT AS PRESENTED

MOTION: DIRECTOR DUTRA

SECOND: DIRECTOR ROTKIN

MOTION PASSED WITH 10 AYES (Directors Bottorff, Chase, Coffman-Gomez, Dutra, Hagen, Leopold, Lind, Mathews, McPherson and Rotkin) Director Rothwell was absent.

19. APPROVE: CONSIDERATION OF AWARD OF CONTRACT TO GMV SYNCROMATICS FOR PURCHASE AND INSTALLATION OF AN INTELLIGENT TRANSPORTATION SYSTEM NOT TO EXCEED \$2,200,000

Isaac Holly, IT and ITS Director spoke to the staff report.

Director Leopold asked if the public would be the beneficiary of the additional \$618K for the optional items. CEO Clifford responded this has been on a fast track to happen before the November vote to ensure state funding. He added the \$618K indirectly benefits the public by providing METRO with more “stop data,” which works into the route and run time planning.

Director Leopold suggested the Capital Projects Committee review the request for the additional spending.

Erron Alvey, Purchasing and Special Projects Director, added METRO is still in negotiations with GMV. If the base contract is approved today, we will refer the optional items to the Committee prior to proceeding with any additional expenditures.

There was no public comment.

ACTION: MOTION TO APPROVE THE AWARD OF THE BASE CONTRACT ONLY TO GMV SYNCROMATICS FOR PURCHASE AND INSTALLATION OF AN INTELLIGENT TRANSPORTATION SYSTEM AND REFER TO COMMITTEE BEFORE PROCEEDING WITH THE ADDITIONAL \$600K SPENDING.

MOTION: DIRECTOR LEOPOLD

SECOND: DIRECTOR ROTKIN

MOTION PASSED WITH 10 AYES (Directors Bottorff, Chase, Coffman-Gomez, Dutra, Hagen, Leopold, Lind, Mathews, McPherson and Rotkin) Director Rothwell was absent.

20. APPROVE: CONSIDERATION OF AUTHORIZING THE CEO TO ENTER INTO MEMORANDA OF AGREEMENTS WITH THE SANTA CLARA VALLEY TRANSPORTATION AUTHORITY (VTA) FOR THE TRANSFER OF TEN (10) 2014 GILLIG DIESEL ELECTRIC HYBRID EXPRESS BUSES, AND THE SALE OF FOUR (4) 2002 DIESEL NEW FLYER ARTICULATED BUSES

Ciro Aguirre, COO, spoke to the staff report and acknowledged Eddie Benson and staff for their contributions to the staff report and their work with VTA to coordinate this process.

Director Dutra departed at 11:41AM

Attachment A

Board and staff discussion regarding the positive impact of this acquisition to METRO's 62 bus replacement needs. Ideas were put forth to show our appreciation to VTA. A joint press conference will be planned with VTA's CEO, Nuria Fernandez, in the near future showcasing two vehicles (one hybrid and one artic), which will have been recently refurbished to reflect METRO branding.

As the vehicles have approximately 60-90K miles each, the anticipated costs to refurbish the vehicles is approximately \$600K.

We plan on receiving five vehicles this year and five in 2019.

Public comment:

Larry Pageler, UCSC representative, said he is thrilled about this proposal. He hopes to provide banana slugs for the windows at the press conference (and going forward).

ACTION: MOTION TO APPROVE AUTHORIZING THE CEO TO ENTER INTO MEMORANDA OF AGREEMENTS WITH THE SANTA CLARA VALLEY TRANSPORTATION AUTHORITY (VTA) FOR THE TRANSFER OF TEN (10) 2014 GILLIG DIESEL ELECTRIC HYBRID EXPRESS BUSES, AND THE SALE OF FOUR (4) 2002 DIESEL NEW FLYER ARTICULATED BUSES AS PRESENTED

MOTION: DIRECTOR LEOPOLD SECOND: DIRECTOR HAGEN

MOTION PASSED WITH 9 AYES (Directors Bottorff, Chase, Coffman-Gomez, Hagen, Leopold, Lind, Mathews, McPherson and Rotkin) Directors Dutra and Rothwell were absent.

21. ACCEPT AND FILE: UPDATE TO THE ZERO EMISSION ELECTRIC BUSES AND RELATED EQUIPMENT PROJECT

Erron Alvey, Purchasing and Special Projects Director, spoke to the staff report, drawing the assembly's attention to Attachment A, noting costs have escalated over the past few years.

Ms. Alvey provided a rough timeline: Five Gillig buses in October 2019; Four Proterras in February 2020; Three OTR coaches, through a competitive procurement, are anticipated in the first quarter of 2020. We anticipate seven electric buses before 2026, all within our own electric program.

CEO Clifford provided an LCTOP grant update. We received written confirmation from the FTA that they agree with our plan to keep the funding and wait for another vendor to enter the market.

There was no public comment.

Director Chase departed 12:12P

ACTION: MOTION TO ACCEPT AND FILE THE UPDATE TO THE ZERO EMISSION ELECTRIC BUSES AND RELATED EQUIPMENT PROJECT AS PRESENTED

MOTION: DIRECTOR LEOPOLD SECOND: DIRECTOR COFFMAN-GOMEZ

MOTION PASSED WITH 8 AYES (Directors Bottorff, Coffman-Gomez, Hagen, Leopold, Lind, Mathews, McPherson and Rotkin) Directors Chase, Dutra and Rothwell were absent.

22. APPROVE: ADOPTION OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT REGULATIONS RELATED TO VEHICLE PARKING AND USE OF PERSONAL TRANSPORTATION VEHICLES IN OR AT SANTA CRUZ METROPOLITAN TRANSIT DISTRICT FACILITIES

Alex Clifford, CEO, spoke to the staff report, proposed regulations and projected recent photos taken of the Soquel park and ride lot. Today we are asking the Board to approve the proposed

Attachment A

regulations, and separately approve the proposal to incorporate public comments concerning the Soquel lot, postponing the closing of the Soquel lot to December 31, 2018 to provide adequate time for the carpoolers to organize, etc. He also provided a brief update on the transit centers:

Watsonville Transit Center: The proposal will allow METRO to enforce the employee parking spaces.

Pacific Station: No problems. METRO will work with the jump bike and scooter program vendors to develop a method to collect and retrieve the property.

Scotts Valley Transit Center: The final tech bus operator, Apple, hopes to relocate by the end of this calendar year. CEO Clifford will assess the parking used by the Blue Bonnet residents and investigate a method that may allow the public using Metro facilities to park overnight via the purchase of a parking pass, etc.

Soquel lot is not a Caltrans Park and Ride lot. It was purchased to support Metro's transit mission. METRO has endeavored to work with Dominican Hospital over the past few years regarding the employees parking in the lot. We are investigating relocating ParaCruz to the Soquel lot. Whatever we do at this facility, we reduce the reliance others may have on this facility

Various suggestions were made to address the situation.

Public comment:

Peter, Live Oak resident, strongly opposes the closure of the Soquel lot, which has been used by himself and coworkers carpooling and vanpooling to work. Closing the lot doesn't solve the problems illustrated in the photos. He noted 511.org lists the lot as a Park and Ride.

Sue, member of a non-MBARI vanpool, which commutes to Monterey and operates seven days a week, said her comments (via phone) are not reflected in the information provided. Some of her fellow commuters come to the lot via bicycles from the West Side. METRO seems to be sending wrong message to the community and has not done their homework. She will provide Director Leopold with her contact information.

After discussion and various suggestions to address the situation, a friendly amendment was made to the motion to extend the Soquel lot closure date to March 31, 2019.

Director Leopold departed 12:57P

ACTION: MOTION TO APPROVE THE ADOPTION OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT REGULATIONS RELATED TO VEHICLE PARKING AND USE OF PERSONAL TRANSPORTATION VEHICLES IN OR AT SANTA CRUZ METROPOLITAN TRANSIT DISTRICT FACILITIES AS PRESENTED WITH DIRECTION TO STAFF TO EXTEND THE SOQUEL PARK AND RIDE LOT CLOSURE TO MARCH 31, 2019

**MOTION: DIRECTOR BOTTORFF SECOND: DIRECTOR ROTKIN
MOTION PASSED WITH 7 AYES (Directors Bottorff, Coffman-Gomez, Hagen, Lind, Mathews, McPherson and Rotkin) Directors Chase, Dutra, Leopold and Rothwell were absent.**

23. REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION

General Counsel Sherman announced the item to be discussed in closed session below.

There was no public comment.

Attachment A

18 RECESS TO CLOSED SESSION AT 12:57PM

SECTION II: CLOSED SESSION

CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION (GOVERNMENT CODE SECTION 54956.9(d)(1))

Claimant: Lawrence Swain
Agency: Santa Cruz Metropolitan Transit District
Marie Sang, Attorney

SECTION III: RECONVENE TO OPEN SESSION AT 1:07PM

19 REPORT OF CLOSED SESSION ITEMS

General Counsel Julie Sherman announced there were no reportable actions from the closed session.

Chair McPherson announced the next meeting: Friday, November 16, 2018 at 9:00AM at the Watsonville City Chambers, 275 Main Street, Watsonville, CA. and adjourned the meeting at 1:08PM.

Respectfully submitted,

Gina Pye
Executive Assistant

DRAFT

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Attachment A

POSITIONS OPEN!

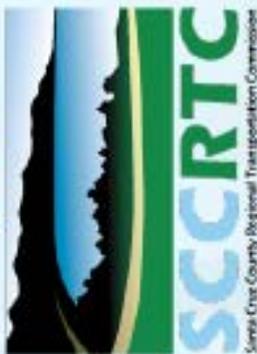


Santa Cruz Metropolitan Transit District

For employment opportunities please visit our
website at <http://scmttd.com> or call
(831)423-5582

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Prepared for:



Unified Corridor Investment Study Step 2 Analysis Results

DRAFT

October 26, 2018

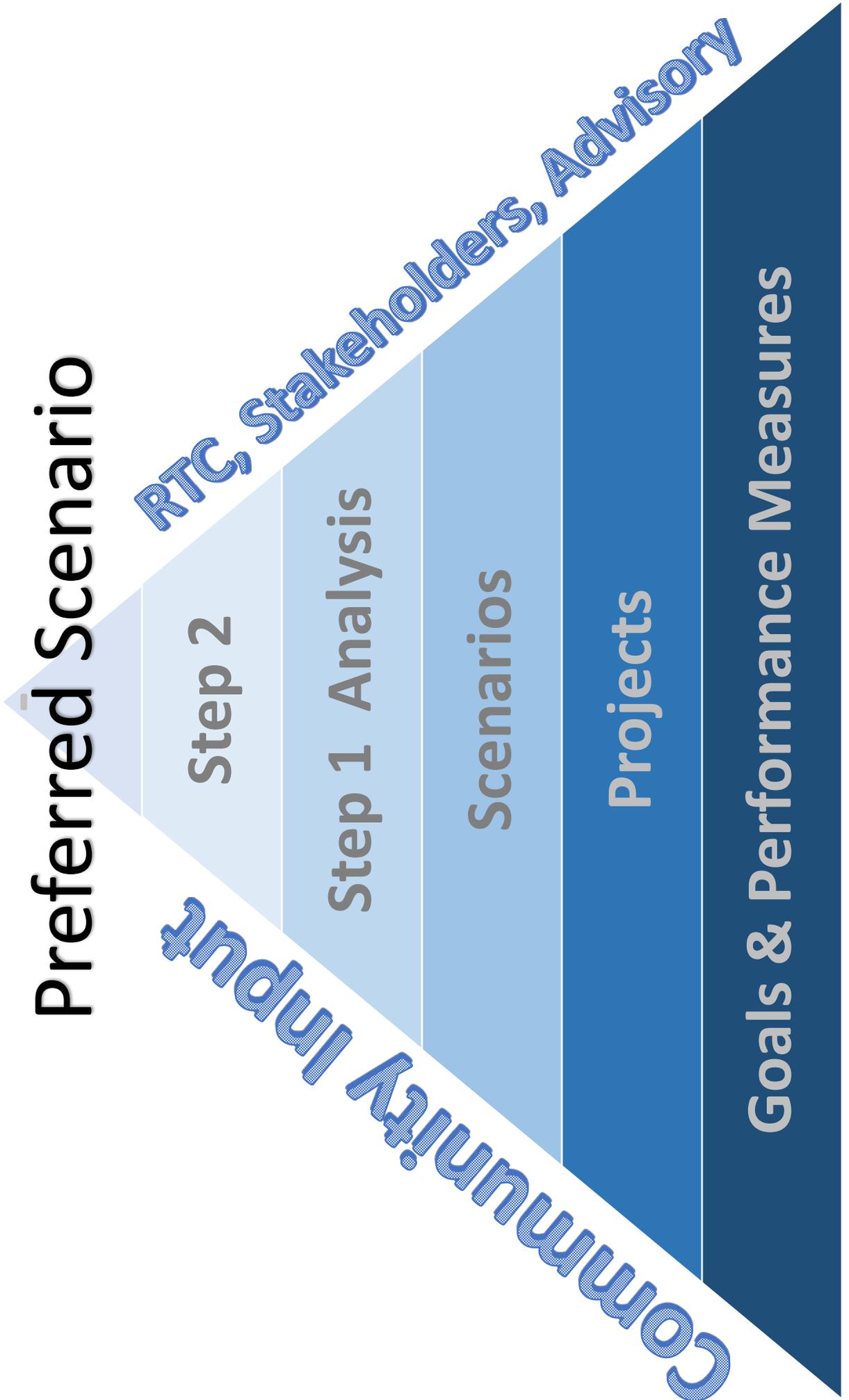
Kimley»Horn





Highway 1, Soquel/Freedom, Rail ROW

9-03A.14



9-03A.15

Step 2 Scenarios for Analysis

Approved by RTC on December 7, 2017

Scenario A

Highway 1 Projects

- HOV and auxiliary lanes, ramp meters, San Lorenzo bridge widening, multimodal intersection improvements

Soquel / Freedom

- BRT Lite with increased transit frequency, multimodal intersection improvements

Rail ROW

- Bike and pedestrian trail only

Scenario B

Highway 1 Projects

- Bus on shoulder, ramp metering, Mission St. intersection improvements

Soquel / Freedom

- BRT Lite with increased transit frequency, buffered/protected bike lanes, bike/ped intersection improvements

Rail ROW

- Bike and pedestrian trail and rail transit

Scenario C

Highway 1 Projects

- Bus on shoulders, auxiliary lanes

Soquel / Freedom

- BRT Lite with increased transit frequency, multimodal intersection improvements

Rail ROW

- Bike and pedestrian trail, bus rapid transit and freight service (in Watsonville)

Scenario E

Highway 1 Projects

- HOV and auxiliary lanes, ramp meters

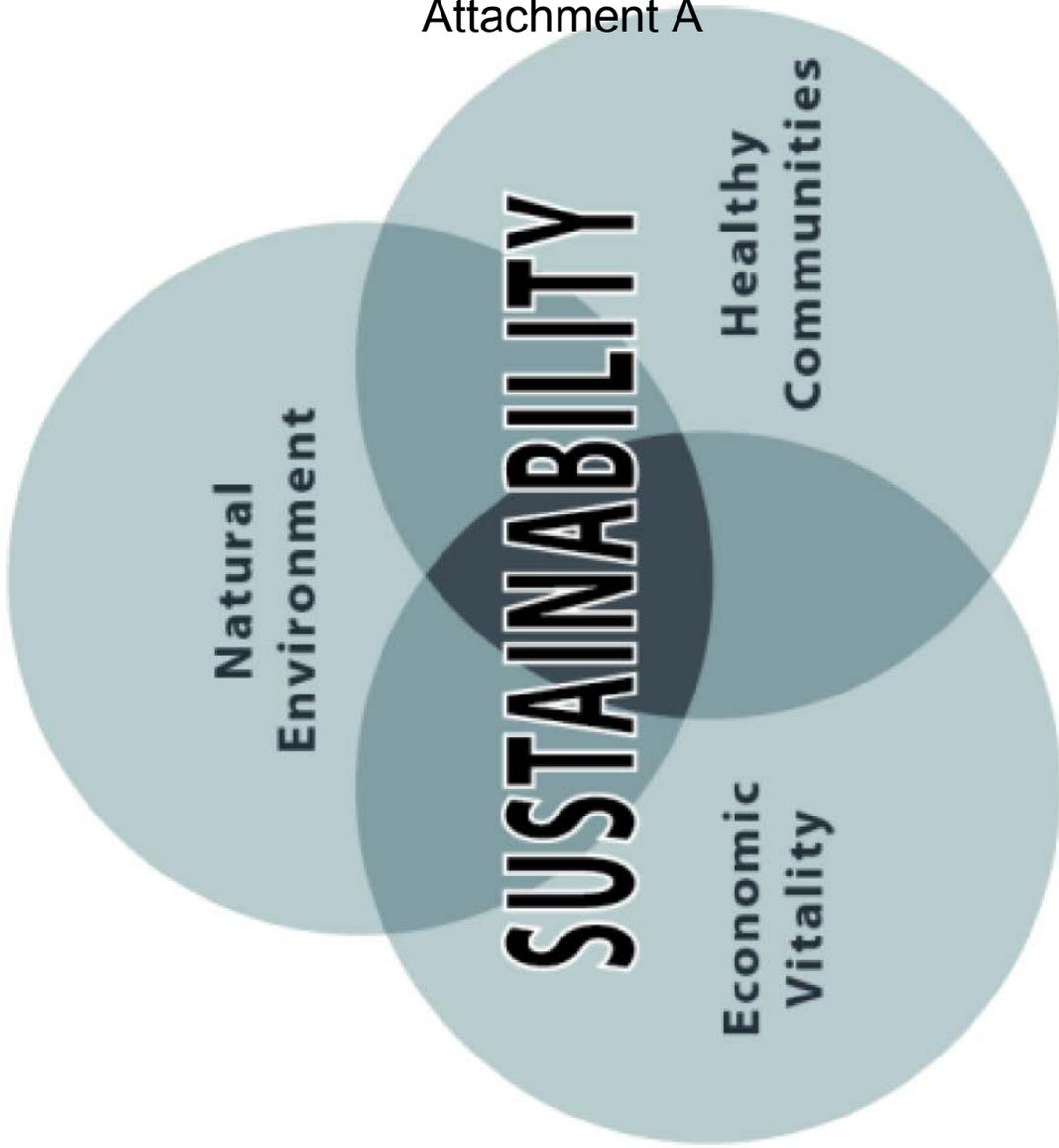
Soquel / Freedom

- Buffered/protected bike lanes, bike/pedestrian intersection improvements

Rail ROW

- Bike and pedestrian trail and rail transit & freight service

9-03A.16



- Safety
- Reliability and efficiency
- Environment and health
- Economic vitality
- Equitable access

9-03A.17

9-03A.18

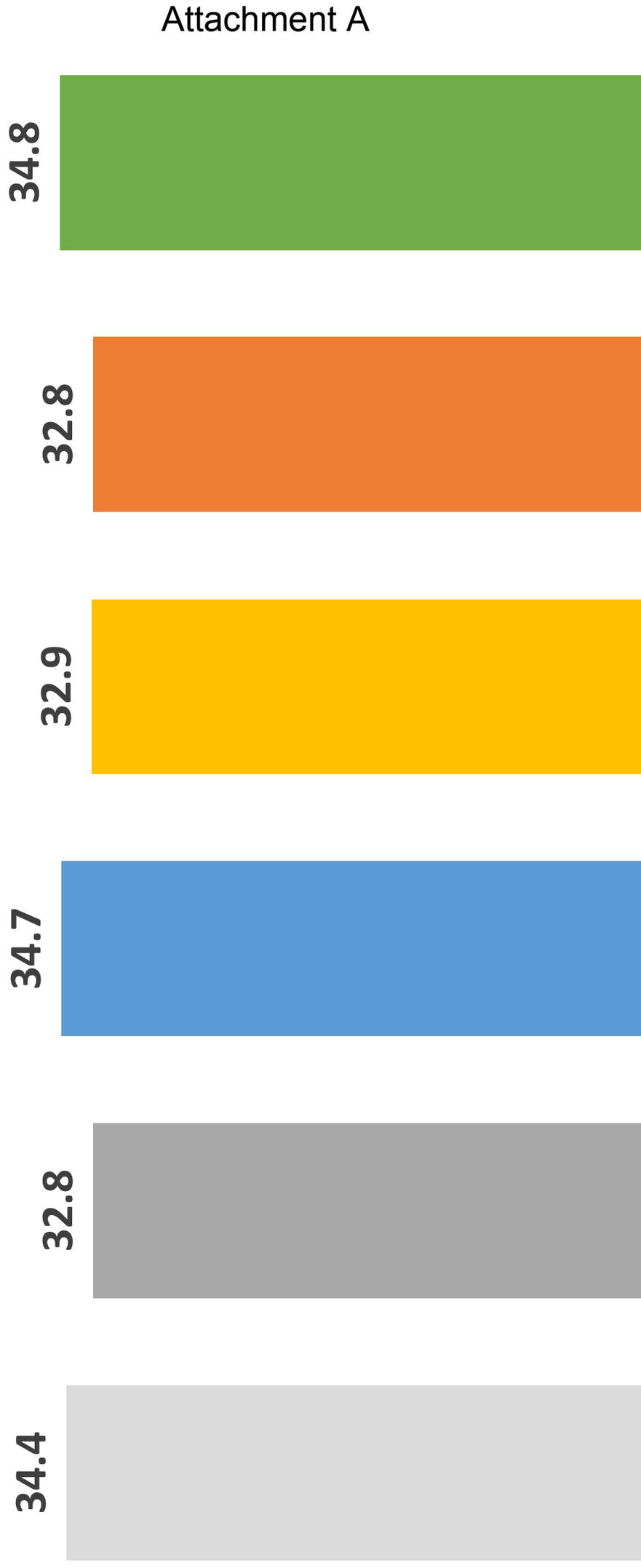
Annual Study Area Collisions



Attachment A

Countywide Peak Period Average Auto Speed (MPH)

4:00 PM to 7:00 PM

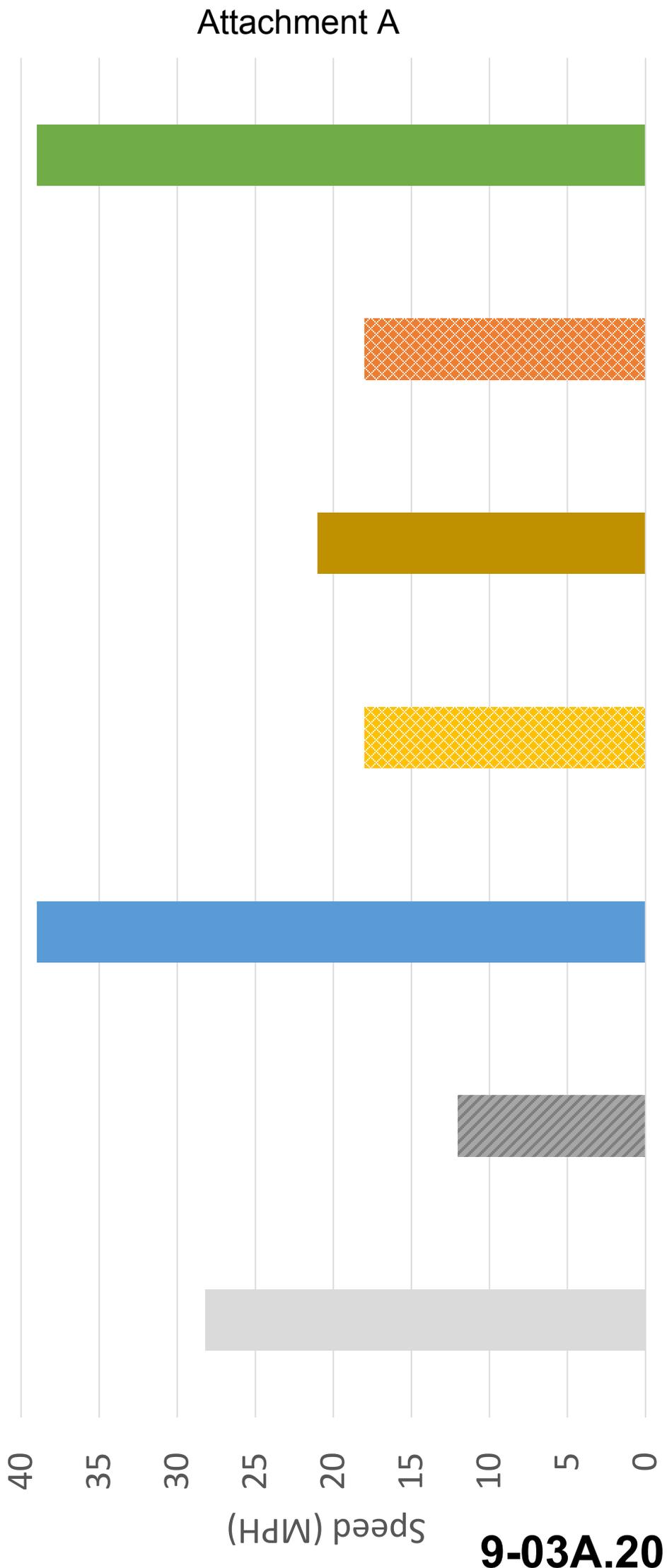


Attachment A

9-03A.19

Hwy 1 Peak Hour Northbound AM

Average Auto Speed (MPH)*



9-03A-20

Attachment A

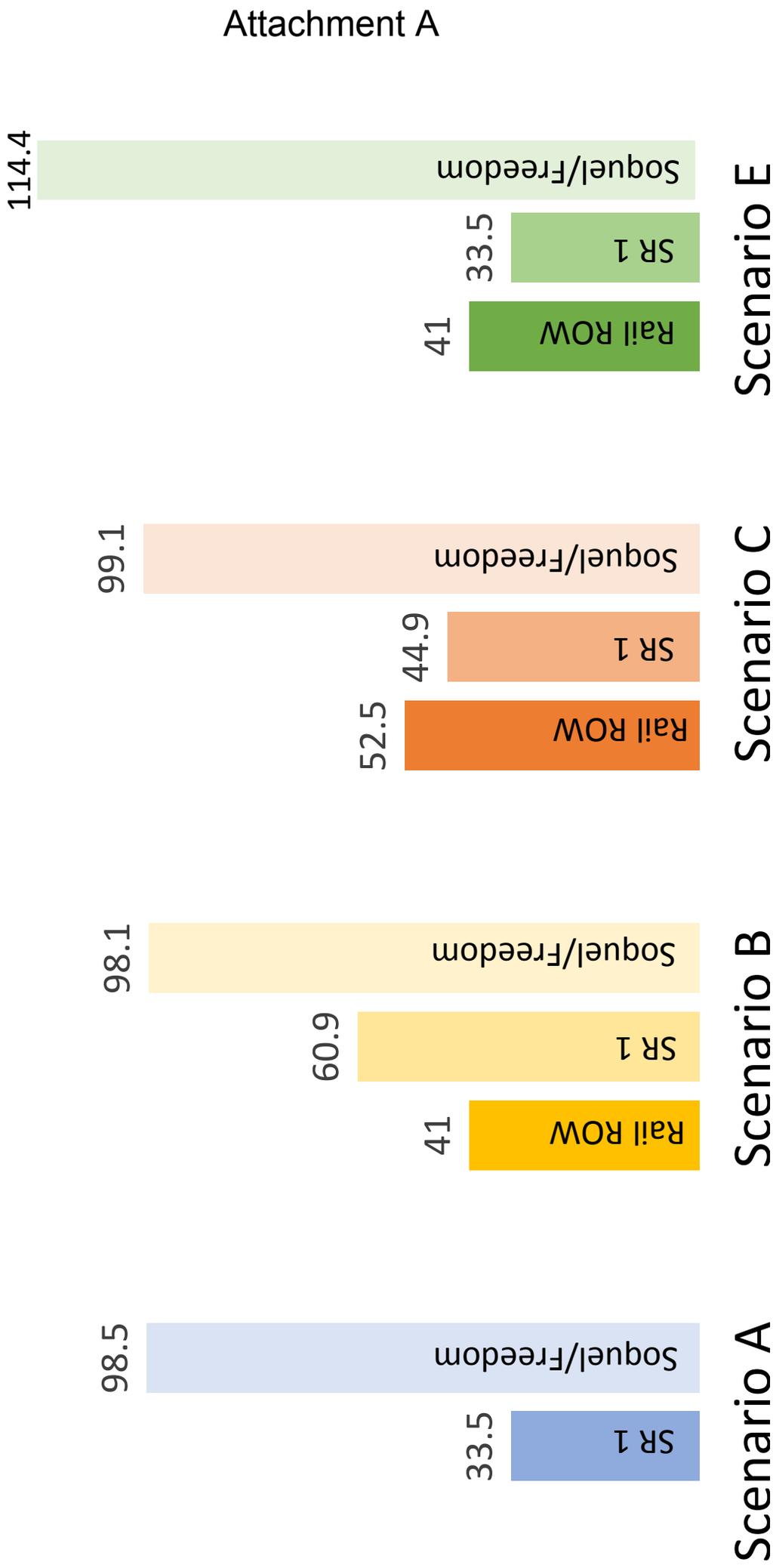
2015 Baseline No Build** Scenario A Scenario B Scenario B+ Scenario C Scenario E

*Data from Draft Highway 1 Environmental Impact Report (DEIR). Hatched data are estimated from Hwy 1 DEIR.

** No Build speed is from Hwy 1 DEIR and does not include the three sets of auxiliary lanes funded by Measure D.

Peak Period Transit Travel Time (4:00 PM to 7:00 PM)

Santa Cruz to Watsonville

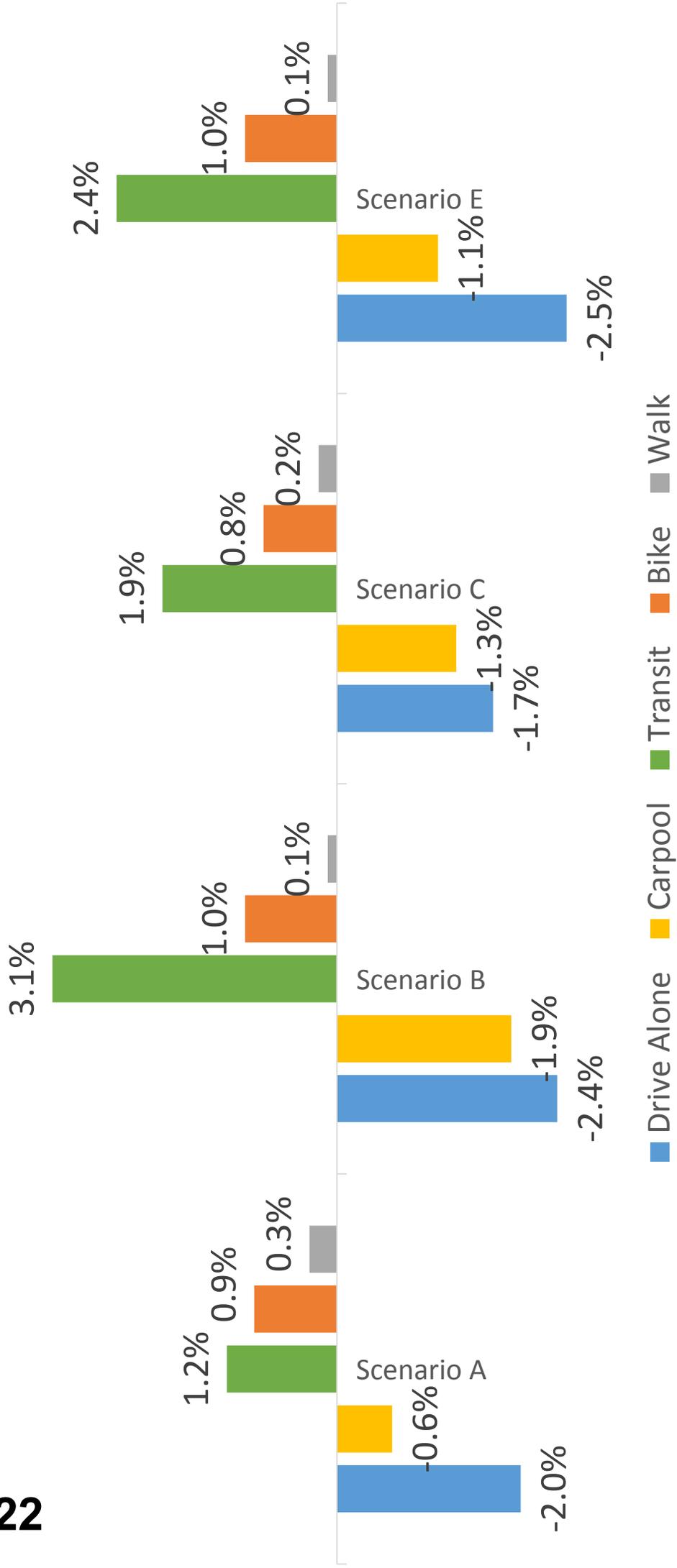


12.A-06

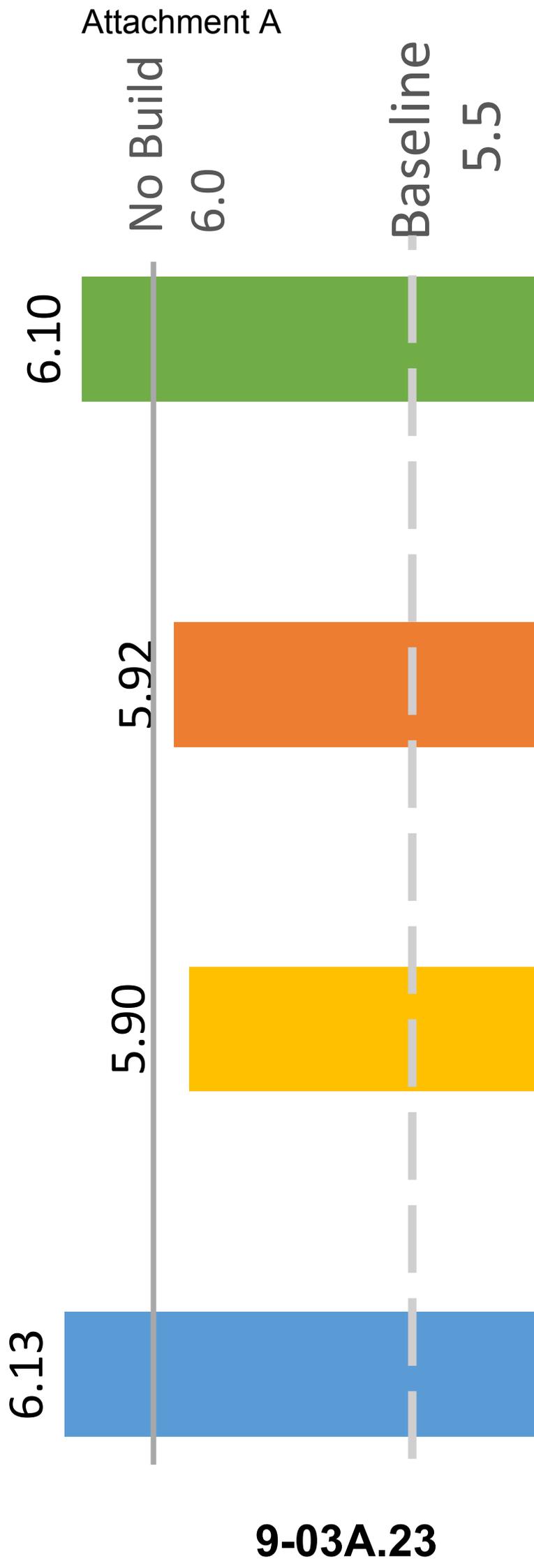
Mode Share Change by Scenario

9-03A.22

Attachment A

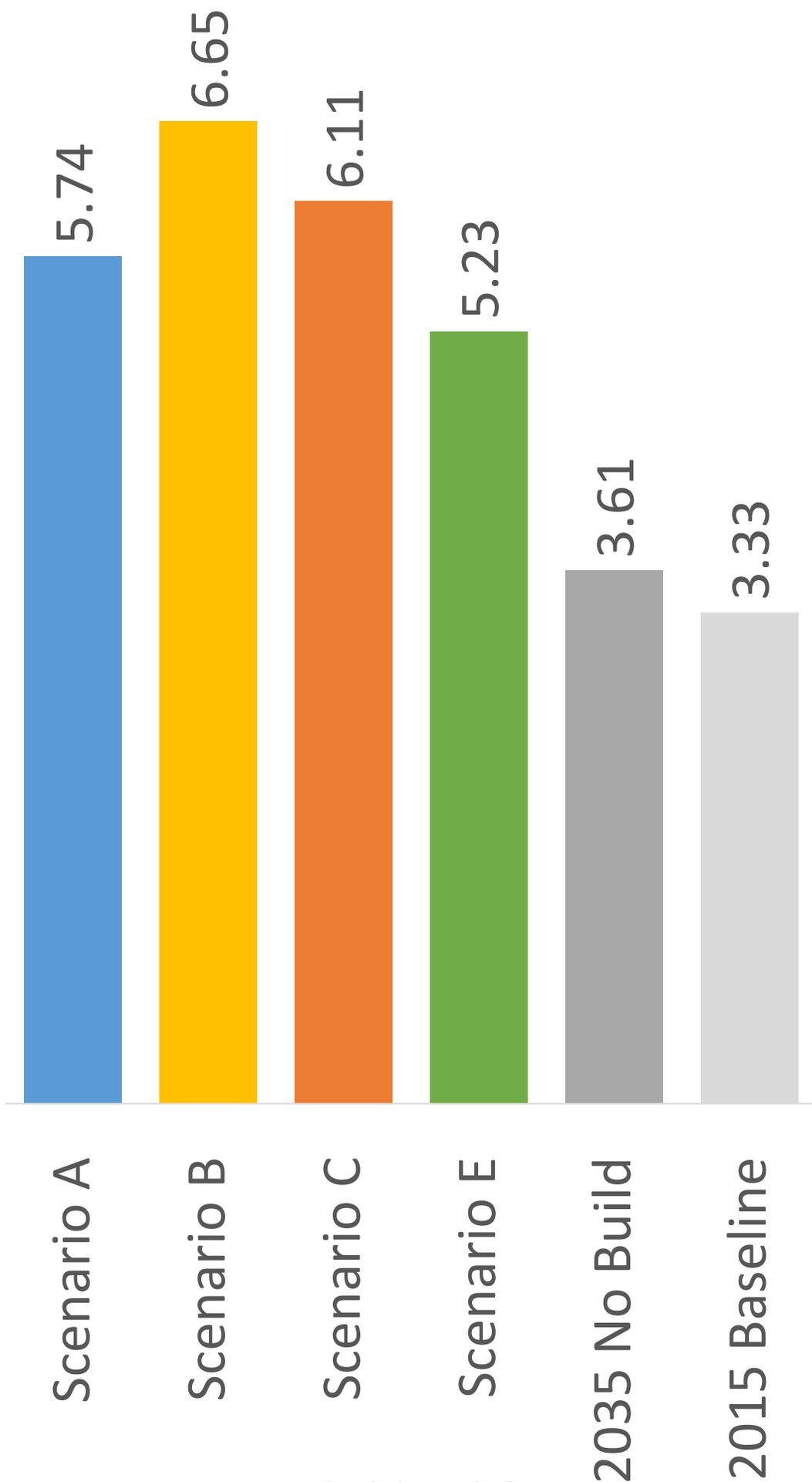


Countywide Vehicle Miles Traveled (in million miles/day)



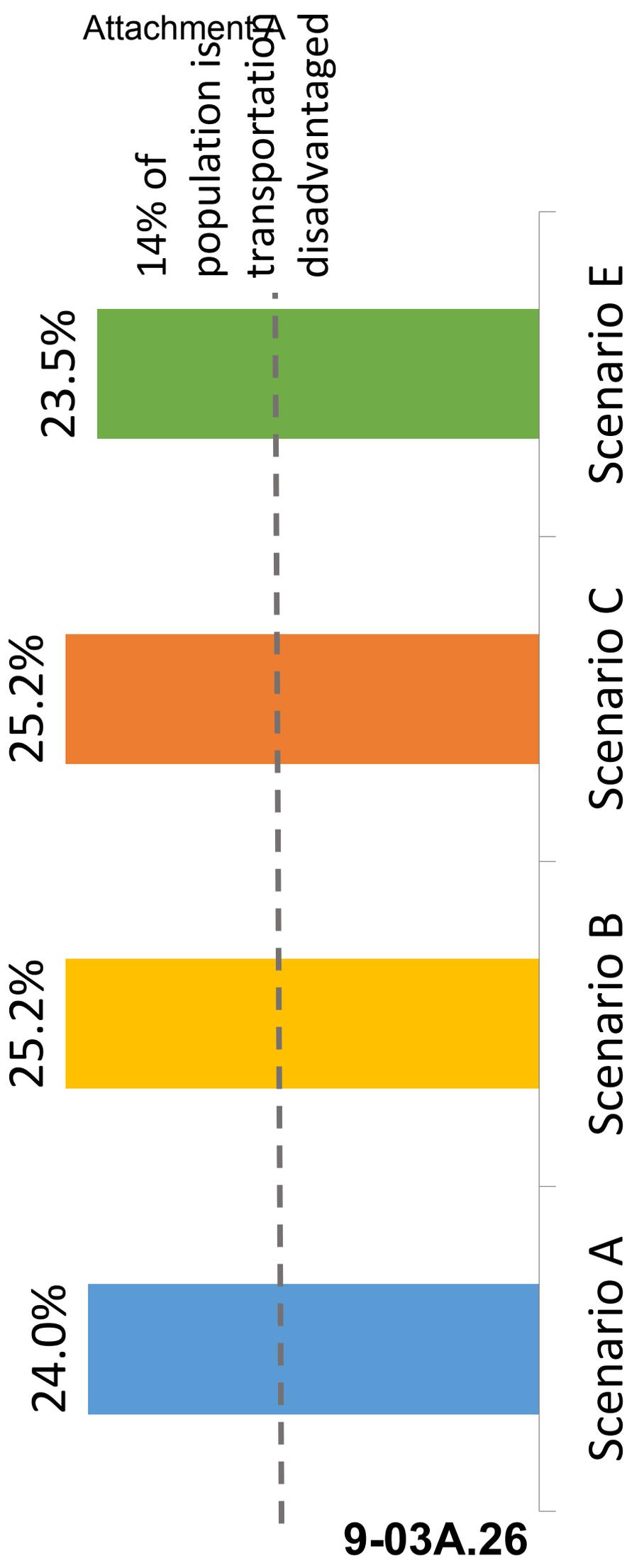
9-03A.23

Annual Transit Vehicle Miles Traveled (in millions)



9-03A.24

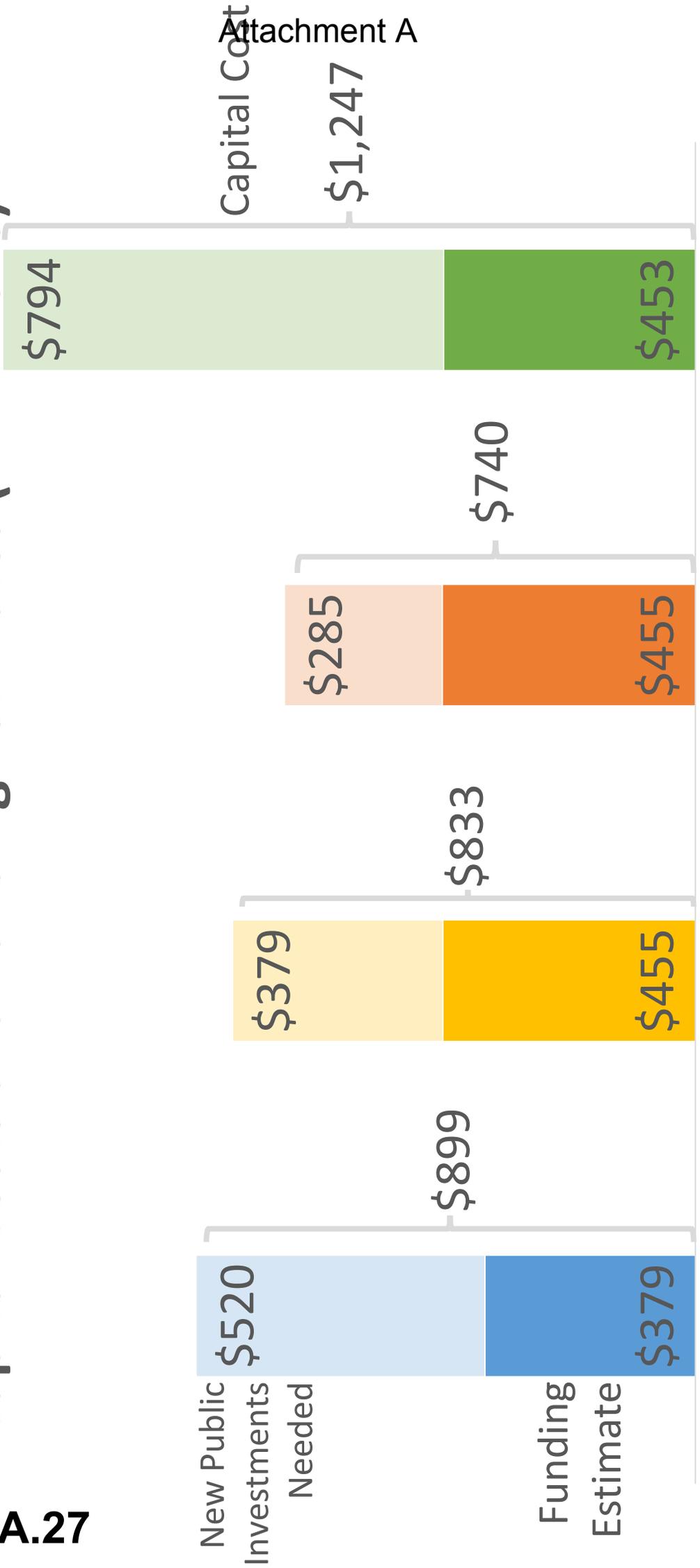
Share of Investment Benefit for Transportation Disadvantaged Population



9-03A.27

Level of Public Investment

Capital Costs and Funding Estimates (in millions)



New Public Investments Needed

Funding Estimate

Scenario A

Scenario B

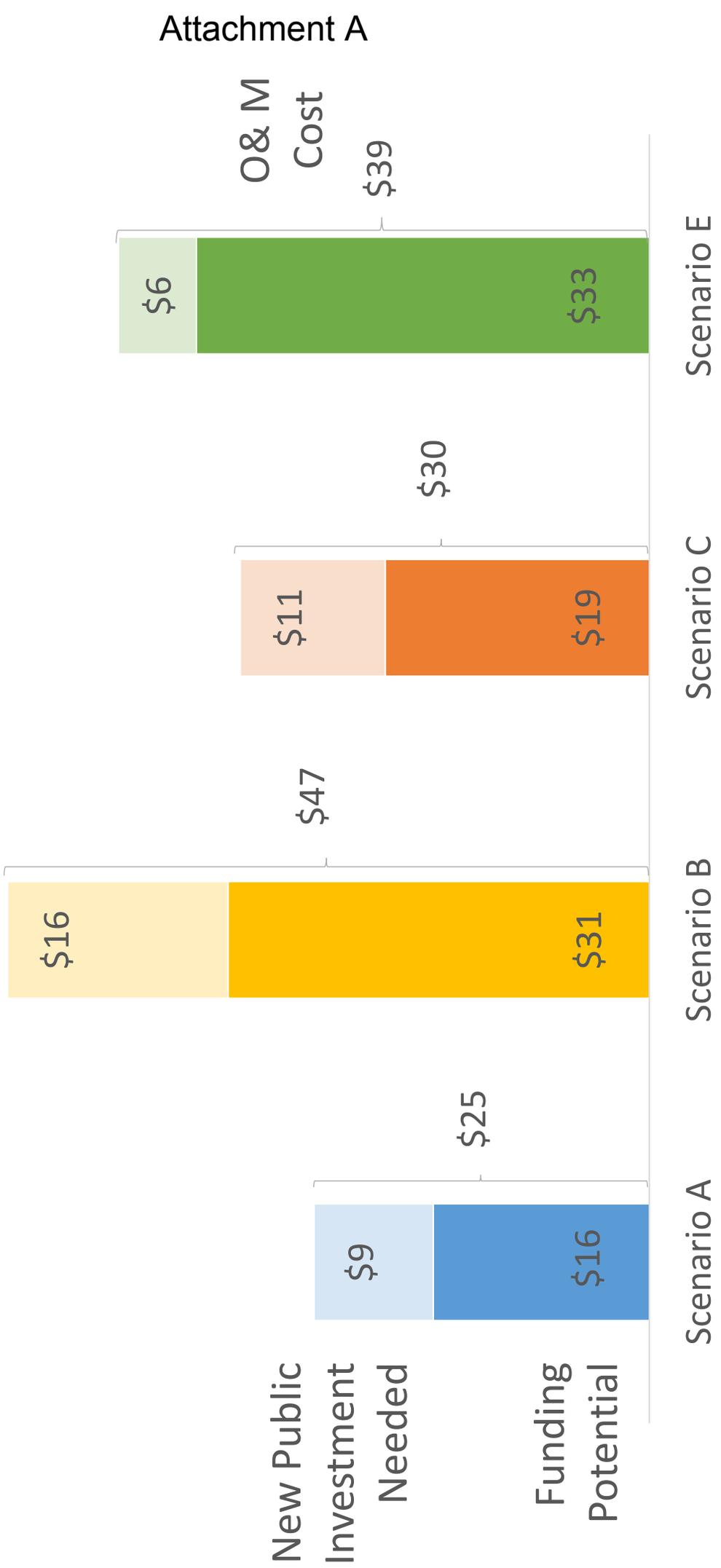
Scenario C

Scenario E

Capital Cost
Attachment A

9-03A.28

Annual Cost for Operations & Maintenance (In millions)



Transportation projects generate economic benefits by improving access

Factors used to evaluate economic benefits for each scenario:

- Area impacted by the transportation improvement
- Who benefits from the improvement
- Creation of a new transportation route
- Creation of a new amenity

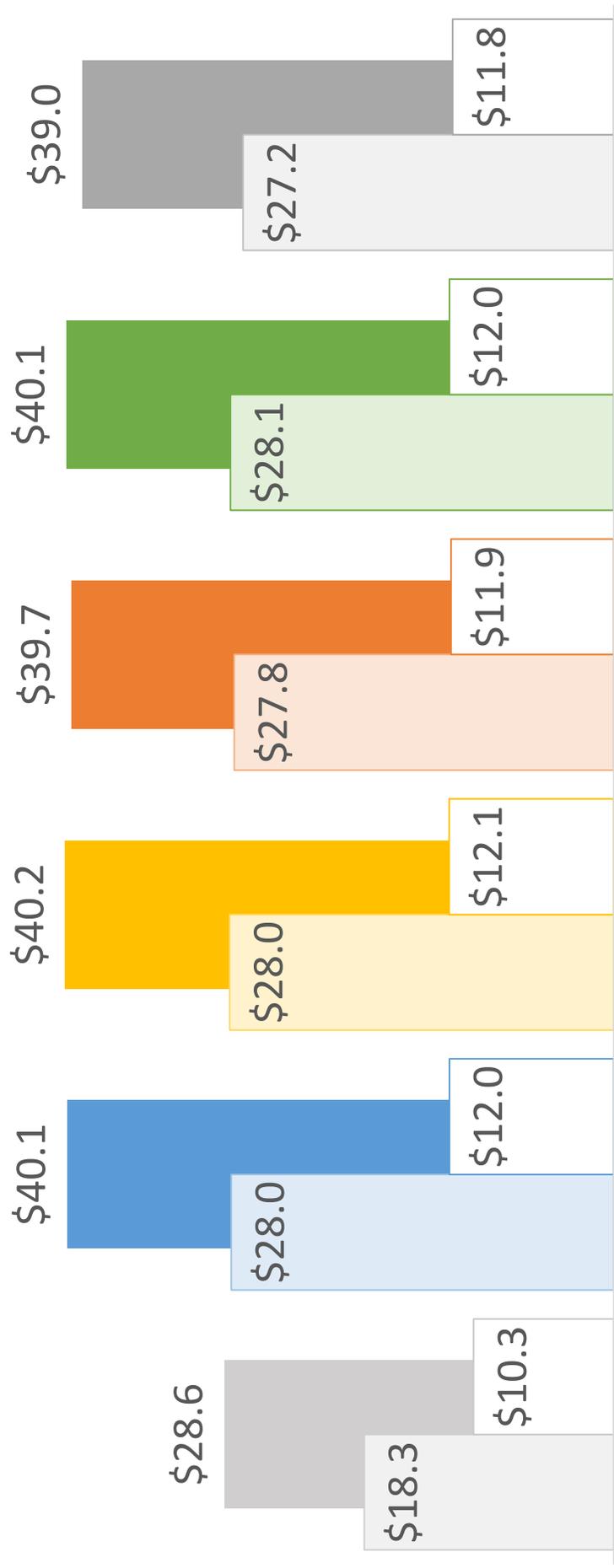
9-03A.29

9-03A.30

Visitor Tax Revenues

(per year in millions)

- Total
- Transient Occupancy Tax
- Visitor Related Sales Tax



Baseline Scenario A Scenario B Scenario C Scenario E No Build

Relative Economic Benefits

	Scenario A	Scenario B	Scenario C	Scenario E
Changes in Business Location Decisions	High	High	Moderate-High	Moderate-High
Changes in Development Potential and Property Values/Rents	Moderate	High	Moderate	Moderate
Changes in Business Performance	Moderate-High	High	Moderate-High	Low
Local Tax Revenue	Moderate-High	High	Moderate-High	Moderate
User Benefits	High	High	Moderate-High	Moderate-High

9-03A.31

- Outreach
 - Stakeholder Meetings
 - RTC Advisory Committees
 - Public Workshops
 - Focus Group Meetings
 - City Council & Metro Presentations
 - RTC Meetings – October 4 and 18, 2018
 - RTC Meeting November 15, 6:00 PM Watsonville (*staff recommendation of preferred Scenario, no action taken*)
 - RTC Meeting December 6, 9:00 AM County Chambers (*action on preferred scenario*)

9-03A.32

SCCRTC

Santa Cruz County
Regional Transportation Commission

DEADLINES FOR COMMENTS

November 2, 2018: For consideration by staff in development of the preferred scenario and revisions to the draft report that will be provided to the RTC on November 15, 2018.

November 20, 2018, 5:00PM: For consideration by staff in development of the final staff recommendation of preferred scenario and draft final report to the RTC on December 6, 2018.

December 5, 2018 12:00PM: For consideration by the commission in the action on the preferred scenario on December 6, 2018.

Website: sccrtc.org

Email: ucs@sccrtc.org



STRATEGICECONOMICS



Attachment A

Backup slides below

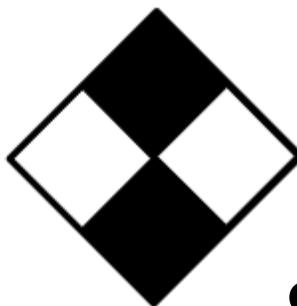
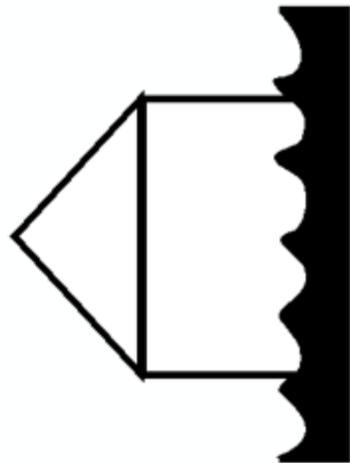
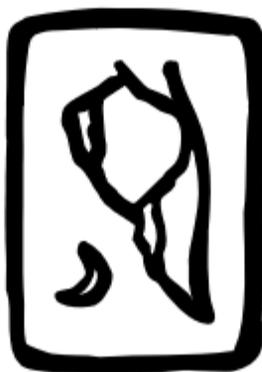
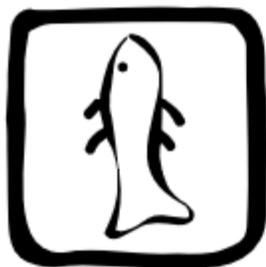
Bus Rapid Transit on the Rail Right-of-Way

9-03A.35

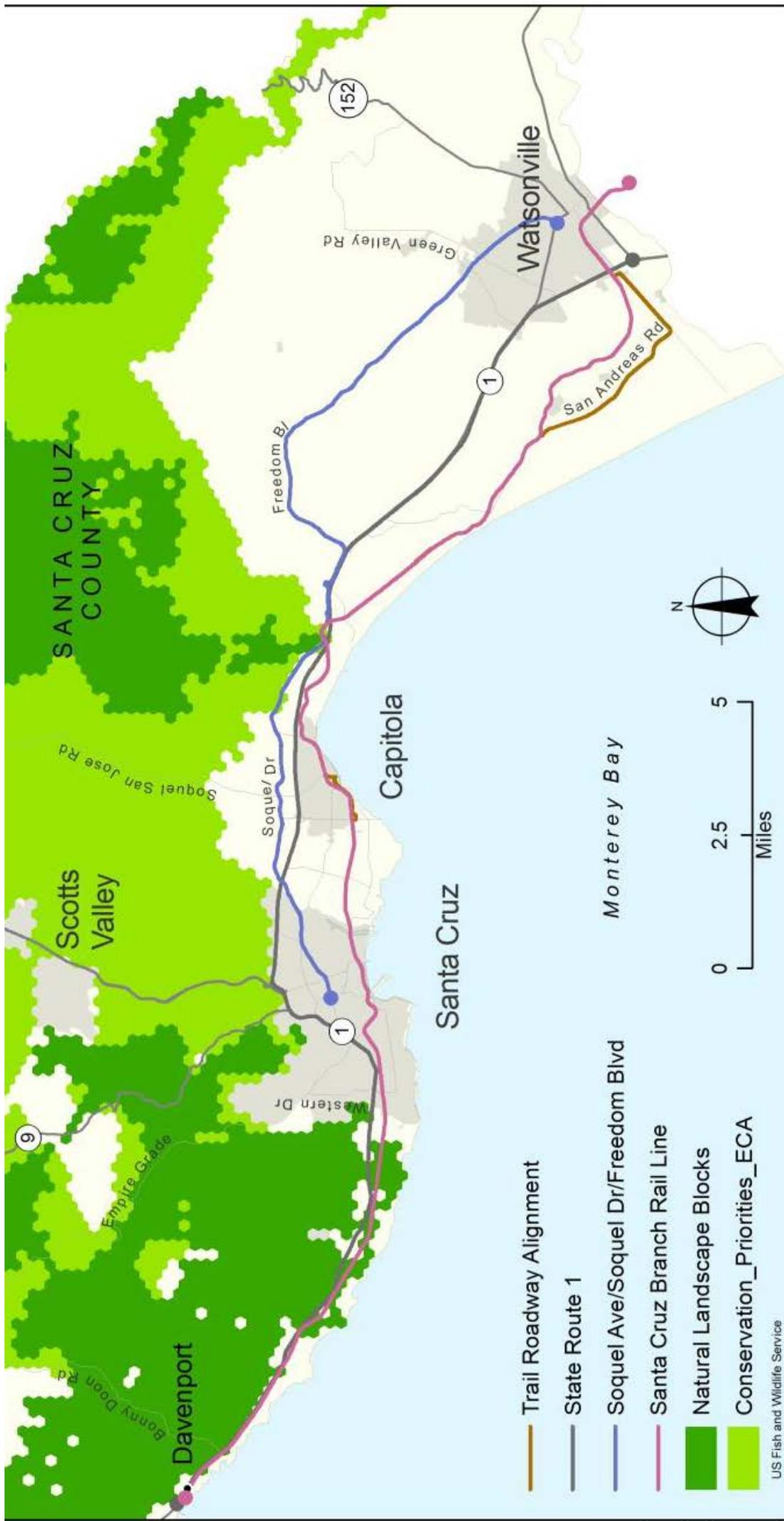


	Transit on Roadways (Daily Ridership)	BRT or Rail on Rail ROW (Daily Ridership)
Baseline	20,160	
No Build	22,924	
Scenario A	32,319	-
Scenario B	40,443	7396
Scenario C	34,038	3949
Scenario E	35,472	6571

Environmentally Sensitive Areas



9-03A.37



9-03A.38

Environmental Analysis – Scenario B



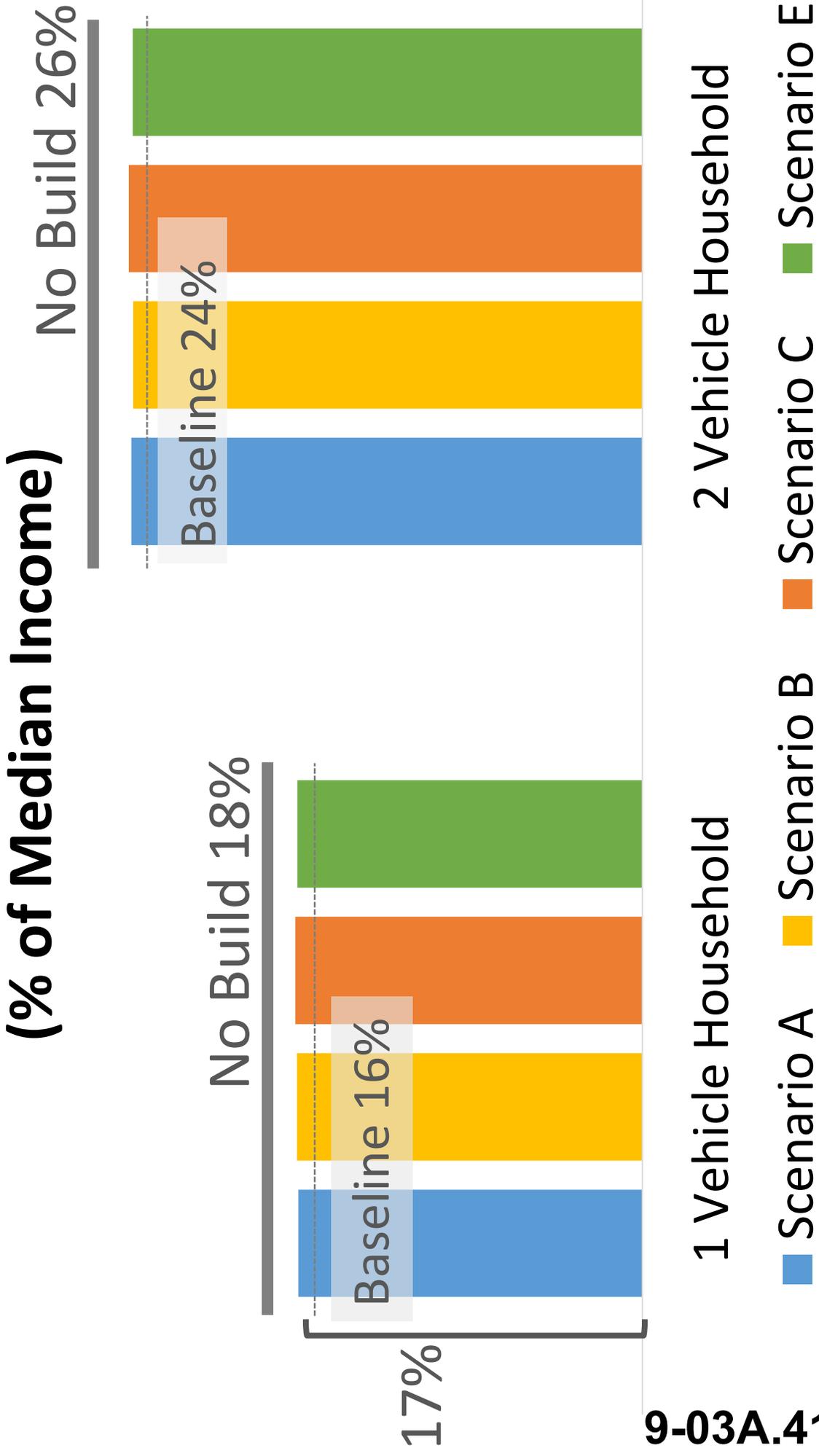
9-03A.39

New Construction and Environmentally Sensitive Areas Overlap

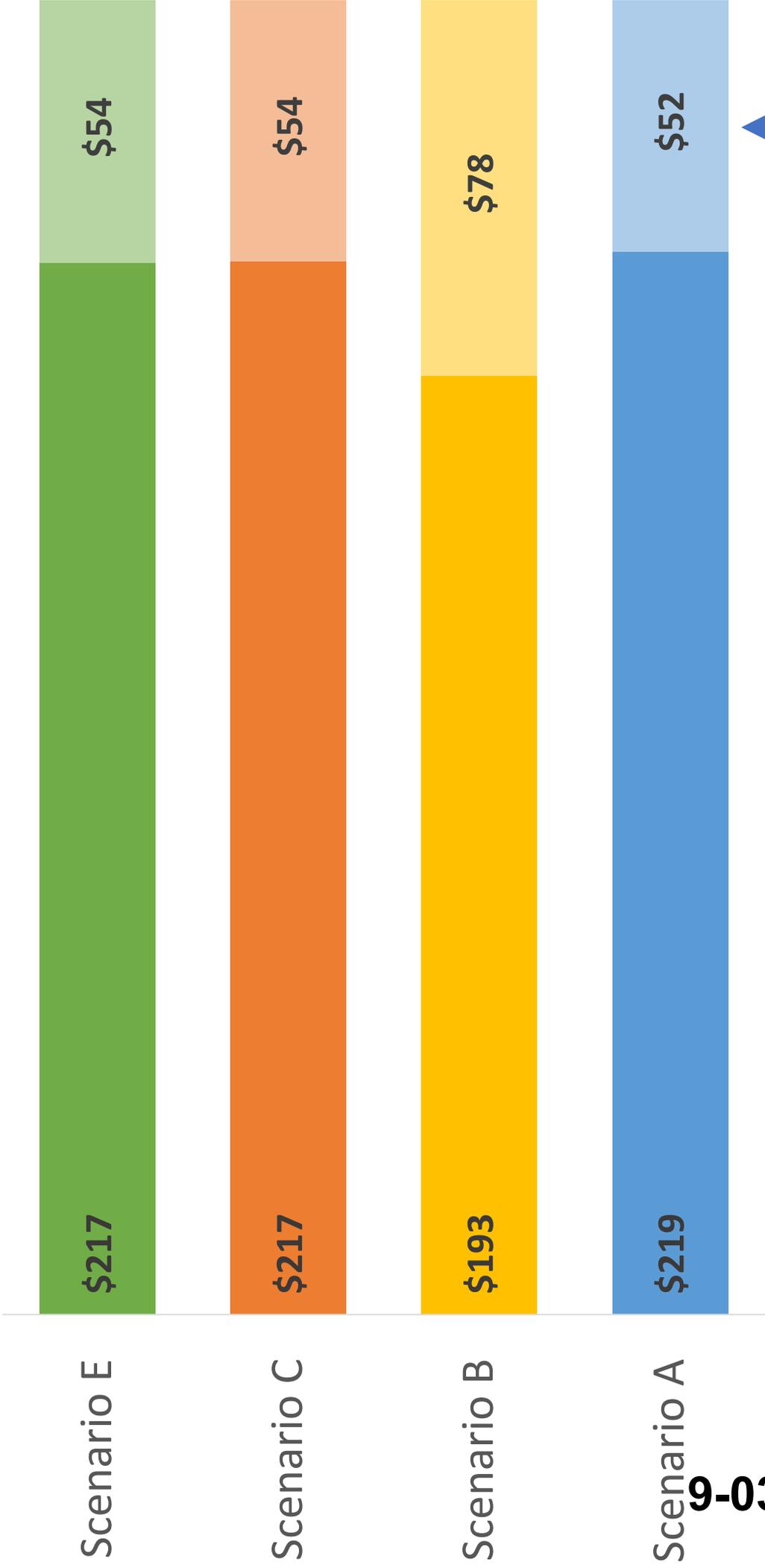
	Length in Miles
Scenario A	36.5
Scenario B	38.3
Scenario C	36.0
Scenario E	40.7

9-03A.40

Household Transportation Cost (% of Median Income)



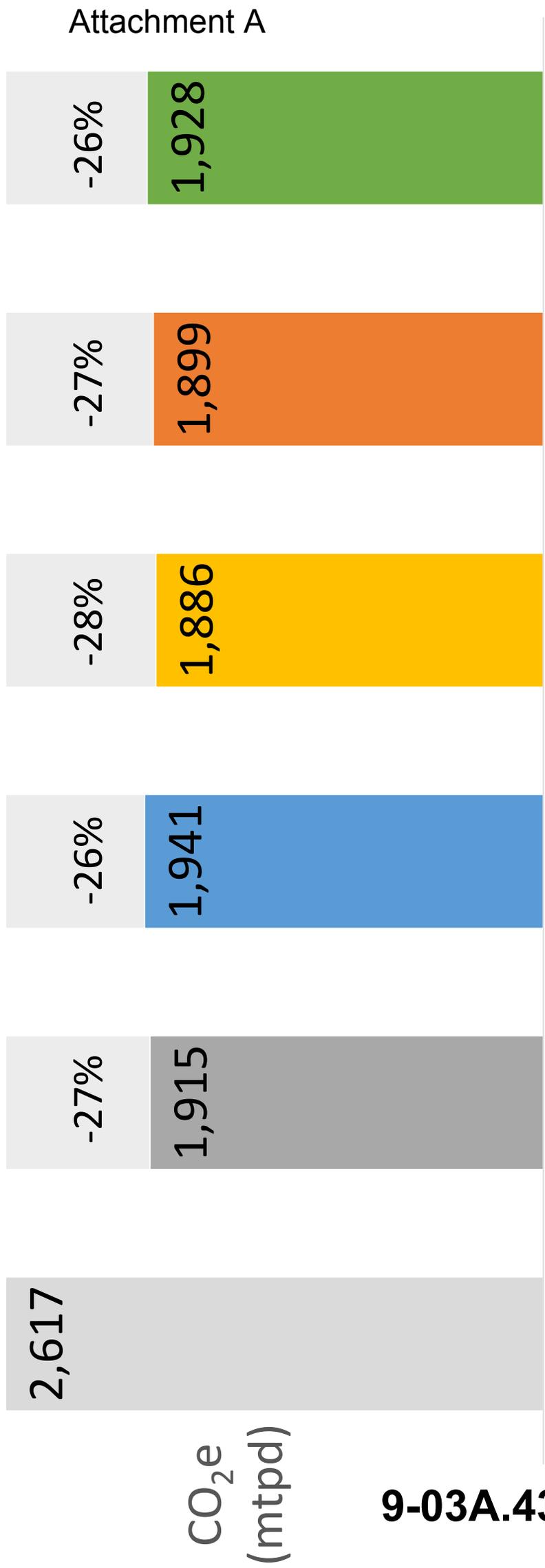
Annual Cost of Collisions (\$millions)



↑
Cost reduction due to project

9-03A.42

CO2e Emissions (metric tons/day) and % Reduction from 2015 Baseline

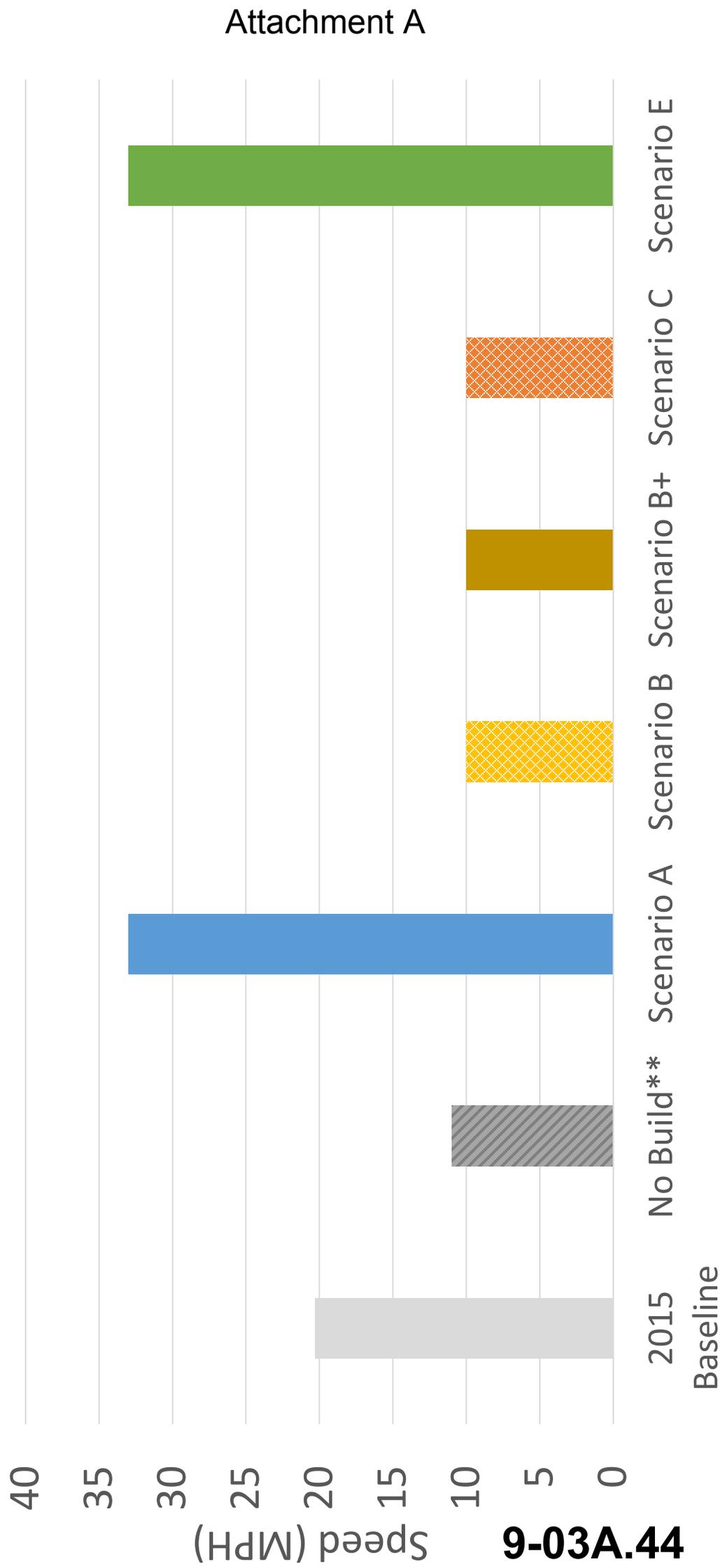


CO₂e
(mtpd)

9-03A.43

Baseline No Build Scenario A Scenario B Scenario C Scenario E

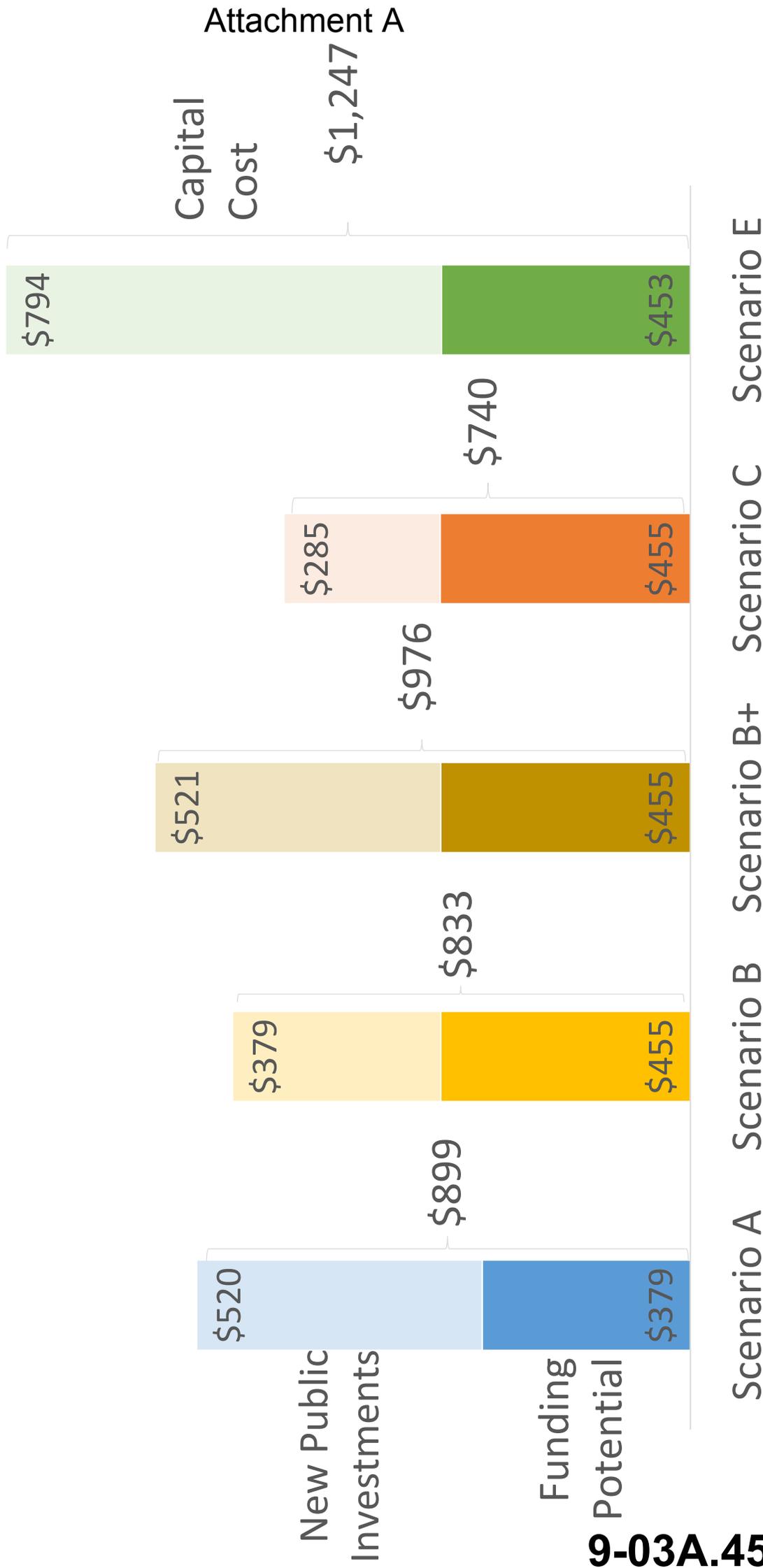
Hwy 1 Peak Hour Southbound PM Average Auto Speed (MPH)*



9-A-06.44

*Data from Draft Highway 1 Environmental Impact Report (DEIR). Hatched data are estimated from Hwy 1 DEIR.
 ** No Build speed is from Hwy 1 DEIR and does not include the three sets of auxiliary lanes funded by Measure D.

Level of Public Investment Capital Costs and Funding Estimates (in millions)



Attachment A
Draft Unified Investment Corridor Study
Step 2 Scenarios for Analysis

Scenario A

Highway 1 Projects

- HOV and auxiliary lanes, ramp meters, San Lorenzo bridge widening, multimodal intersection improvements

Soquel / Freedom

- BRT Lite with increased transit frequency, multimodal intersection improvements

Rail ROW

- Bike and pedestrian trail only

Scenario B

Highway 1 Projects

- Bus on shoulder, ramp metering, Mission St. intersection improvements

Soquel / Freedom

- BRT Lite with increased transit frequency, buffered/protected bike lanes, bike/ped intersection improvements

Rail ROW

- Bike and pedestrian trail and rail transit

Scenario C

Highway 1 Projects

- Bus on shoulders, auxiliary lanes

Soquel / Freedom

- BRT Lite with increased transit frequency, multimodal intersection improvements

Rail ROW

- Bike and pedestrian trail, bus rapid transit and freight service (in Watsonville)

Scenario E

Highway 1 Projects

- HOV and auxiliary lanes, ramp meters

Soquel / Freedom

- Buffered/protected bike lanes, bike/pedestrian intersection improvements

Rail ROW

- Bike and pedestrian trail and rail transit & freight service



OCTOBER 17, 2018
SPECIAL BOARD MEETING
UPDATE

SUCCESSIONS

2014 - 2018

- Eliminated Structural Deficit
 - Balanced Annual Budget
 - Reserve Buckets Replenished
 - Annual Recurring Capital Funding Program Established
- Comprehensive Operations Analysis (COA) Implemented
- Zero Emissions Bus Commitment
- Broad Public Support for METRO Expressed Through Measure D and SB1
- Standing Board Committees Established:
 - Capital Projects
 - Finance, Budget and Audit
 - Personnel/Human Resources
- Multiple Grants Won for New Buses and ParaCruz Vehicles
- Creative Bus Replacement Strategy Approved by Board
 - Acquired Three (3) Lease-to-Purchase Fixed-Route Buses
 - Acquired Ten (10) Standard and Four (4) Articulated Buses from VTA
- Judy K. Souza METRO Operations Facility Completed

SUCCESES

2014 - 2018

- Investments in Technology
 - Cameras on Buses
 - Automated Vehicle Locator (Real Time Information for Riders)
- Watsonville Transit Center Remodel Completed
- Customer Service Booth Established at Watsonville Transit Center
- CNG Heavy Vehicle Fueling Partnership with City of Santa Cruz
- Enhanced Relationships with Colleges
 - Successful Articulated Bus Pilot Project with UCSC
 - Cabrillo College Student Bus Pass Program Implemented
- Outside Legal Counsel Established
- Initiated First Ever Classification and Compensation Study
- Completed First Federally Required Transit Asset Management (TAM) Plan
- Staffed Safety/Security and Implemented Enhanced Safety Practices



DRAFT STRATEGIC BUSINESS PLAN PRIORITIES

1. Safety First Culture
2. Financial Stability, Stewardship and Accountability
3. Service Quality and Delivery
4. Internal and External Technology
5. Employee Engagement: Attract, Retain and Develop
6. State of Good Repair
7. Strategic Alliances and Community Outreach

STRATEGIC BUSINESS PLAN NEXT STEPS

- 1ST Session - October 2018
Initial Board/Management Work Session
- 2nd Session – Late 2018/Early 2019
Post Proposition 6 Budget Review
- 3rd Session – Early 2019
Incorporation of Strategic Business Plan
Initiatives Into FY20 Budget Process

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PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Santa Cruz METRO](#)
To: [Cayla Hill](#)
Subject: [CSV-0000001377] Closure of Santa Cruz Park and Ride
Date: Tuesday, October 23, 2018 2:07:24 PM

Hello,

A new ticket has been added:

[CSV-0000001377](#)

alana.sherman@gmail.com wrote:

Hello

I am writing to express my concern about the proposed closure of the Soquel Park and Ride lot in the next week. I am a commuter who uses that lot of park and van pool rather than driving myself to Moss Landing. This lot has been great for me and my fellow van pool riders, as it offers a convenient and relatively safe location to leave our cars, as a result on any given day there are 15-20 less cars on our congested highways. We have found it difficult in the past to find an appropriate stop to park multiple cars. It would be a great solution if some spaces were left open in the lot for car pools and van pools, even if the lot were closed at night. I know there is a community meeting at 9 am on Friday but I will need to be working then, so I hope this is an appropriate venue to voice my concerns.

Your Phone - Include Area Code: 5108479624

Preferred method of contacting you: Email address entered above

Your Address: 513 Cabrillo Ave

Your City: Santa Cruz

Your State: CA

Your Zip: 95065

Nature of Comment: Complaint

Date of Incident: 10.23.2018

Time of Incident: 0:00

Route: Not applicable

Choose location : Other Location (enter below)

Location - additional information: Soquel Park and Ride

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Shonoa Ruddick](#)
To: [Cayla Hill](#)
Subject: Park & Ride Complaints
Date: Tuesday, October 23, 2018 2:59:40 PM
Attachments: [image001.png](#)

Good afternoon,

I had a few people call yesterday and today regarding the closure of the Soquel Park & Ride.

They had questions on why it was closing and if there are any alternatives on what to do for those who car/vanpool.

1. Diane Nelson ; 831-476-6090
2. Peter Walz ; 831-775-1740

Any questions, let me know.

Thank you,

Sasha G Sandoval
Customer Service Rep.
920 Pacific Ave. Ste. 21
Santa Cruz, CA 95060
831-425-8600
ssandoval@scmttd.com

Shonoa Ruddick
Safety, Security, & Risk Director
Interim Customer Service Manager



Santa Cruz Metropolitan Transit District
110 Vernon Street
Santa Cruz, CA 95060
(831) 426-6080
<http://www.scmttd.com>

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Santa Cruz METRO](#)
To: [Cayla Hill](#)
Subject: [CSV-0000001374] Soquel Ave Park & Ride
Date: Tuesday, October 23, 2018 11:56:11 AM

Hello,

A new ticket has been added:

[CSV-0000001374](#)

John.Ryan555@gmail.com wrote:

Greetings, I am among the vanpoolers who would be adversely affected by the planned closure of the Soquel Ave Park & Ride next to Hwy 1. This location has been excellent for the vanpool group of which I am a part, and its loss would have a negative impact on a program that is keeping a lot of cars off the road. Further, this closure planned for this Friday has given us essentially no time to find alternatives. I encourage the Metro board to hit the pause button. After all, this lot has had extensive investment in accommodating cars and bicycles, and it is in great shape. Why suddenly close a very useful resource without giving its users a chance to understand and weigh in? I cannot be at the board meeting this Friday, but that does not indicate the importance of the topic to me, just other commitments. Thank you for considering this matter.

Your Phone - Include Area Code: 831 428 1137

Preferred method of contacting you: Email address entered above

Your Address: 522 14th Ave

Your City: Santa Cruz

Your State: CA

Your Zip: 95062

Nature of Comment: Inquiry

Date of Incident: Click the calendar

Time of Incident: daily

Route: Not applicable

Choose location : Street & Cross street (enter below)

Location - additional information:

Vehicle Number - If Known:

Direction of Travel: Inbound

9-03A.55

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Shonoa Ruddick](#)
To: [Cayla Hill](#); [Ciro Aguirre](#); [Alex Clifford](#)
Subject: FW: Santa Cruz METRO Park & Ride
Date: Wednesday, October 24, 2018 8:21:24 AM
Attachments: [image001.png](#)
[image001.png](#)

From: John Ryan [mailto:john.ryan555@gmail.com]
Sent: Tuesday, October 23, 2018 5:06 PM
To: Shonoa Ruddick <SRuddick@scmtd.com>
Subject: Re: Santa Cruz METRO Park & Ride

Hi Shonoa,

Thanks for your quick response.

Yes, delaying the closure until December 31 would be helpful.

Regards,

John

On Tue, Oct 23, 2018 at 4:05 PM Shonoa Ruddick <SRuddick@scmtd.com> wrote:

Re: Santa Cruz METRO Park & Ride

Thank you for contacting Santa Cruz Metropolitan Transit District. We have received your concerns, both online and through our Customer Service line, and appreciate the opportunity to communicate with you.

I have included alternative Park & Ride Locations around the county, as an attachment.

Public comment may be posed, in person, at the below meeting.

Santa Cruz Metropolitan Transit District Board Meeting on October 26, 2018 at 420 Capitola Ave. Capitola, California @ 0900 hours.

We recognize that this change will create a hardship for some and ask if delaying the closure until December 31, 2018 would be helpful.

All comments and replies to this email, online, and by phone will be presented at the above board meeting.

Thank you.

Shonoa Ruddick

Safety, Security, & Risk Director
Interim Customer Service Manager

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: Molly Gallet

Sent: Tuesday, October 23, 2018 9:16 AM

To: Ben Rubio <brubio@scmttd.com>

Cc: Heather Forshner <HForshner@scmttd.com>; Shonoa Ruddick <SRuddick@scmttd.com>

Subject: RE: Soquel Park & Ride Questions

Good Morning

Kathleen Pitz called to complain about Soquel Park & Ride says she uses it everyday and would like to file a complaint and be contacted regarding this kpitz23@gmail.com.

Thank you!

Molly Gallet

Santa Cruz Metropolitan Transit District (Santa Cruz Metro)

Customer Service Representative

920 Pacific Ave. Ste. 21

Santa Cruz, CA 95060

831-425-8600

mgallet@scmttd.com



PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Shonoa Ruddick](#)
To: [Cayla Hill](#)
Subject: Park & Ride Complaints
Date: Tuesday, October 23, 2018 3:01:27 PM
Attachments: [image001.png](#)

Hi Shonoa,

I use the parking lot Monday through Friday, leaving my car at the lot at 7:20am and being dropped off at the lot at 6-6:30pm. I commute in to Moss Landing, CA with the Monterey Bay Aquarium Research Institute van pool. Employees take turns driving minivans that are provided by MBARI. We park the minivans at our own personal residences then pick up other riders at the Soquel Park and Ride. There isn't another good option where we can park multiple cars during the day in order to take the same van.

Email is the best way to reach me; this address is fine or my work email is kpitz@mbari.org. My office phone is 831-775-1894.

Thank you,
Katie Pitz

Shonoa Ruddick

**Safety, Security, & Risk Director
Interim Customer Service Manager**



Santa Cruz Metropolitan Transit District
110 Vernon Street
Santa Cruz, CA 95060
(831) 426-6080
<http://www.scmttd.com>

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Shonoa Ruddick](#)
To: [Cayla Hill](#)
Subject: FW: Santa Cruz METRO Park & Ride
Date: Wednesday, October 24, 2018 9:03:44 AM
Attachments: [image001.png](#)
[image001.png](#)

From: Kathleen Pitz [mailto:kpitz23@gmail.com]
Sent: Wednesday, October 24, 2018 9:02 AM
To: Shonoa Ruddick <SRuddick@scmted.com>
Subject: Re: Santa Cruz METRO Park & Ride

Hi Shonoa,

Delaying the closure would be helpful to allow us time to find an alternative location. For the alternative park and ride locations list, I believe the Quaker meeting house park and ride location was closed after concerns about homeless camping out overnight occurred. We were in contact with them last year. I think the Soquel P&R lot might be the last one near downtown Santa Cruz?

Thanks,
Katie

On Tue, Oct 23, 2018 at 4:05 PM Shonoa Ruddick <SRuddick@scmted.com> wrote:

Re: Santa Cruz METRO Park & Ride

Thank you for contacting Santa Cruz Metropolitan Transit District. We have received your concerns, both online and through our Customer Service line, and appreciate the opportunity to communicate with you.

I have included alternative Park & Ride Locations around the county, as an attachment.

Public comment may be posed, in person, at the below meeting.

Santa Cruz Metropolitan Transit District Board Meeting on October 26, 2018 at 420 Capitola Ave. Capitola, California @ 0900 hours.

We recognize that this change will create a hardship for some and ask if delaying the closure until December 31, 2018 would be helpful.

All comments and replies to this email, online, and by phone will be presented at the above board meeting.

Thank you.

Shonoa Ruddick

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Ciro Aguirre](#)
To: [Cayla Hill](#)
Cc: [Shonoa Ruddick](#)
Subject: FW: Soquel Park & Ride Questions
Date: Tuesday, October 23, 2018 2:44:46 PM
Attachments: [image001.png](#)
[image002.png](#)

From: Shonoa Ruddick
Sent: Tuesday, October 23, 2018 10:48 AM
To: Alex Clifford; [Ciro Aguirre](#)
Subject: RE: Soquel Park & Ride Questions

Caller 10/23/18

This individual is part of a van pool that goes to Monterey Bay Area Research Institute on weekdays.

Name: Kim Fulton Bennett
Ph: 831-775-1835

I contacted the person above. They have three vans that they run from the Park & Ride to Moss Landing every day. They have between 10-20 people daily. They also occasionally leave one of their vans there overnight. He thinks that the Monterey Bay Aquarium uses the Park & Ride also. I found his name under the above number and then searching for (Fulton)

We had a good conversation and I will keep his contact info.
Shonoa

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Santa Cruz METRO](#)
To: [Cayla Hill](#)
Subject: [CSV-0000001375] Park and Ride Closure
Date: Tuesday, October 23, 2018 2:06:41 PM

Hello,

A new ticket has been added:

[CSV-0000001375](#)

mhamilton@mbari.org wrote:

Hello,

I am writing to express my concern regarding the sudden and unexpected closure of the Soquel Park and Ride scheduled for Oct 29th. For the last few years I have been part of the Monterey Bay Aquarium Research Institute (MBARI) vanpool program that utilizes the Park and Ride. This sudden closure will seriously affect our ability operate and leaves me personally doubting the ability of Santa Cruz Metro (and the ability of the city of Santa Cruz) to serve its citizens. I am requesting that this closure be reconsidered or that an alternate Park and Ride location be opened nearby immediately.

Signed,

Maria Hamilton

Graduate Student Researcher

Monterey Bay Aquarium Research Institute

Your Phone - Include Area Code: 360-597-5660

Preferred method of contacting you: Email address entered above

Your Address: 326 Cayuga St.

Your City: Santa Cruz

Your State: CA

Your Zip: 95062

Nature of Comment: Complaint

Date of Incident: 10.29.2018

Time of Incident: NA

Route: Not applicable

Choose location : Street & Cross street (enter below)

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Santa Cruz METRO](#)
To: [Cayla Hill](#)
Subject: [CSV-0000001381] Soquel park'n'ride closure
Date: Wednesday, October 24, 2018 8:57:51 AM

Hello,

A new ticket has been added:

[CSV-0000001381](#)

mariah@mbari.org wrote:

Hello,

Please reconsider closing the Soquel park'n'ride lot.

My employer runs a vanpool program, and we rely heavily on this park'n'ride stop. Over the years, it has become increasingly difficult to find a safe place for people to leave their cars or bikes during the day.

Additionally, we have employees, collaborators visiting from afar, and interns that do not have cars and are completely dependent on the vanpool to get them to Moss Landing each day, as there are not reasonable public transport options.

The location of this park'n'ride is ideal for the majority of our riders, with 3 vans stopping at that location each morning and evening. Scotts Valley, Aptos, and Wattsonville locations don't work at all for us.

If you are closing it to use the space for something else, would you consider saving a small part of it, 20-30 spaces, for those who currently use it? It is true that the lot is not usually full, but close to half of our riders either walk or bike to this stop, so its usage is not accurately represented by the number of cars parked there.

Thank you for your consideration,

Mariah

Your Phone - Include Area Code: 831-775-1893

Preferred method of contacting you: Email address entered above

Your Address:

Your City:

Your State:

Your Zip:

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

Nature of Comment: Complaint

Date of Incident: 10.23.2018

Time of Incident: n/a

Route: Not applicable

Choose location : Other Location (enter below)

Location - additional information: Soquel park'n'ride

Vehicle Number - If Known: n/a

Direction of Travel: Not sure?

Employee Name or Number - If Known: n/a

Employee Position: Not applicable

If Other, Please Describe:

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Santa Cruz METRO](#)
To: [Cayla Hill](#)
Subject: [CSV-0000001382] Closure
Date: Wednesday, October 24, 2018 10:37:47 AM

Hello,

A new ticket has been added:

[CSV-0000001382](#)

majordude19@yahoo.com wrote:

I use the Soquel Park & Ride on a regular basis for my work van pool. Our van pool servers 20 plus persons on a daily basis cutting down on pollution and hwy 1 traffic. This announced closure is a major inconvenience and the short notice leaves us no time to find an alternate location.

Your Phone - Include Area Code: 831-775-1989

Preferred method of contacting you: Email address entered above

Your Address: 2425 Paul Minnie Ave

Your City: Santa Cruz

Your State: CA

Your Zip: 95062

Nature of Comment: Complaint

Date of Incident: 10.29.2018

Time of Incident: 7:00 am

Route: Not applicable

Choose location : Other Location (enter below)

Location - additional information: Soquel Park & Ride Lot

Vehicle Number - If Known:

Direction of Travel: Outbound

Employee Name or Number - If Known:

Employee Position: Not applicable

If Other, Please Describe: Closure

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Santa Cruz METRO](#)
To: [Cayla Hill](#)
Subject: [CSV-0000001376] Park N Ride lot closure
Date: Tuesday, October 23, 2018 2:06:53 PM

Hello,

A new ticket has been added:

[CSV-0000001376](#)

wape@mbari.org wrote:

I regularly commute by carpool or vanpool to Moss Landing. It was just posted at the Soquel Park N Ride lot that it would be closing in 6 days (Oct 29).

The reason for closure is unclear to me, but I do not agree with this decision or the short period of time we now have to find alternative parking.

Especially from a community that should be encouraging alternate forms of transportation and commuting options to relieve traffic congestion this does not make much sense to me.

Will there be alternative park n ride lots provided for commuters?

The parking lot was just resurfaced and repainted, and it used by many people monday thru friday.

Please provide some context or justification for closing this Park N Ride lot. I will also be communicating with my County Supervisor, John Leopold.

Your Phone - Include Area Code: 8317089163

Preferred method of contacting you: Email address entered above

Your Address: 1587 Webster St

Your City: Santa Cruz

Your State: CA

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Shonoa Ruddick](#)
To: [Cayla Hill](#); [Alex Clifford](#)
Subject: FW: Santa Cruz METRO Park & Ride Soquel lot
Date: Wednesday, October 24, 2018 9:35:18 AM
Attachments: [image001.png](#)
[Park and Ride Lot Locations.pdf](#)

From: Peter Walz [mailto:wape@mbari.org]
Sent: Wednesday, October 24, 2018 9:29 AM
To: Shonoa Ruddick <SRuddick@scmttd.com>
Subject: Re: Santa Cruz METRO Park & Ride Soquel lot

Hello Shonoa -

Thank you for the prompt reply and info about the SC Metro Board meeting this Friday.

Your document listing other Park N Ride locations is not accurate - the Quaker Meetinghouse lot is no longer open. We have used that in the past for our vanpool routes and it is now locked off.

The Soquel Park N Ride lot is the only location that can be easily accessed from East or West Santa Cruz, and the only site that has bike racks/bike parking.

<https://cruz511.org/drive/park-and-ride/>

For the meeting this Friday, I see there is a public comment period at the start of the meeting (item 6 of agenda below) but I cannot find anywhere in the Oct 26 Agenda where they are discussing or voting on the closure of the Park N Ride lot off Soquel. Has this action been discussed or included in previous Board meeting agenda's?

<https://www.scmttd.com/en/agency-info/board/board-of-directors>

*6 ORAL AND WRITTEN COMMUNICATIONS TO THE BOARD OF DIRECTORS
This time is set aside for Directors and members of the general public to address any item not on the Agenda which is within the subject matter jurisdiction of the Board. No action or discussion shall be taken on any item presented except that any Director may respond to statements made or questions asked, or may ask questions for clarification. All matters of an administrative nature will be referred to staff. All matters relating to Santa Cruz METRO will be noted in the minutes and may be scheduled for discussion at a future meeting or referred to staff for clarification and report. Any Director may place matters brought up under Communications to the Board of Directors on a future agenda. In accordance with District Resolution 610-2-1, speakers appearing at a Board meeting shall be limited to three minutes in his or her presentation. Any person addressing the Board may submit written statements,*

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

petitions or other documents to complement his or her presentation. When addressing the Board, the individual may, but is not required to, provide his/her name and address in an audible tone for the record.

Thanks for your continued assistance -

Peter Walz
wape@mbari.org
831-708-9163

From: "Shonoa Ruddick" <SRuddick@scmttd.com>
To: "Shonoa Ruddick" <SRuddick@scmttd.com>
Sent: Tuesday, October 23, 2018 4:05:32 PM
Subject: Santa Cruz METRO Park & Ride

Re: Santa Cruz METRO Park & Ride

Thank you for contacting Santa Cruz Metropolitan Transit District. We have received your concerns, both online and through our Customer Service line, and appreciate the opportunity to communicate with you.

I have included alternative Park & Ride Locations around the county, as an attachment.

Public comment may be posed, in person, at the below meeting.

Santa Cruz Metropolitan Transit District Board Meeting on October 26, 2018 at 420 Capitola Ave. Capitola, California @ 0900 hours.

We recognize that this change will create a hardship for some and ask if delaying the closure until December 31, 2018 would be helpful.

All comments and replies to this email, online, and by phone will be presented at the above board meeting.

Thank you.

Shonoa Ruddick
Safety, Security, & Risk Director
Interim Customer Service Manager



Santa Cruz Metropolitan Transit District
110 Vernon Street
Santa Cruz, CA 95060

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Santa Cruz METRO](#)
To: [Cayla Hill](#)
Subject: [CSV-0000001378] Closure of Soquel park n ride
Date: Tuesday, October 23, 2018 2:08:27 PM

Hello,

A new ticket has been added:

[CSV-0000001378](#)

rgwiazda@gmail.com wrote:

Hello,

i would like to convey the impact the closure of the Soquel park n ride will have on my daily commute and others with whom I carpool.

I have been using the lot for a number of years to park and take a vanpool to my place of work in Moss Landing. Three vans from my workplace (MBARI) utilize this lot to collect passengers who leave their cars parked there over the day, or who reach the lot by bike or by foot. This location has served us well, though not ideally since vans left there overnight have occasionally been vandalized. The number of daily users through the three vanpools oscillate daily between at least 12 to a maximum of 20, my estimate. I have also seen vanpools from the Monterey Bay Aquarium dropping passengers at the lot

In the absence of a viable park and ride option we will be forced to drive individually to work. I understand that METRO may have larger considerations for why to close this lot at this time. I was informed that it will become a site for Paracruz vehicles. However, I think that if METRO needs to change the way it uses its facilities it also needs to find ways to accommodate users impacted by these changes. I was surprised both by the short notice provided to us commuters about the impending closure of the lot, and by the lack of alternatives offered to users of the lot. I talked to METRO customer support, to John Leopold's office and to Ciro Aguirre, METRO COO, and while everybody was cordial and understandable, it seems this plan is being rolled out without consideration to the impact of current lot users.

I suggest a possible either temporary or permanent solution: The lot is clearly underutilized, yet there is always a respectable number of cars park there through the day. I suggest to close most of the lot but leave 20% of its space open until a more permanent commuter space is found. Please not that some of the commuters are people that reach the lot by foot or bike. A substitute park and ride lot at a considerable distance (for example the church at the State Park exit) may not be workable for some of us.

I would also like to point out that setting a Board of Director meeting at 9:00 am to receive public input from commuters about this issue is a poor choice of time. Most of us can not make it at that time on a working day.

Thanks for your consideration

Roberto Gwiazda

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Ciro Aguirre](#)
To: [Cayla Hill](#)
Subject: FW: Park& Ride Alternative Sites
Date: Tuesday, October 23, 2018 6:14:36 PM

From: [Ciro Aguirre](#)
Sent: Tuesday, October 23, 2018 6:14 PM
To: 'Roberto Gwiazda'
Subject: RE: Park& Ride Alternative Sites

Mr. Gwiazda,

Yes, it is confirmed, the meeting will take place at the Capitola City Council Chambers at the address below same stipulated time.

Thank you.

From: Roberto Gwiazda [<mailto:rgwiazda@gmail.com>]
Sent: Tuesday, October 23, 2018 4:28 PM
To: [Ciro Aguirre](#)
Subject: Re: Park& Ride Alternative Sites

Mr Aguirre,

Thanks for your attention to my concerns. When I talked to your assistant, she mentioned Vernal St as the place of the meeting. Can you please confirm that it is in the Capitola City council Chambers?

I appreciate you sending me the list of alternative sites

We have used the Quaker house but it ended up being not workable because there were few spaces on Friday if I recall correctly. The other places are out of town and out of the way for commuters going southbound on hwy 1, like us, or out of the way for bikers wanting to take the vanpool. The only place that may work is the church in State Park
Thanks

Roberto

On Tue, Oct 23, 2018 at 3:02 PM [Ciro Aguirre <CAguirre@scmtd.com>](#) wrote:

Mr. Gwiazda,

Pleasure speaking to you this morning. As discussed, attached is a list of Park and Ride sites that in the event the Paul Sweet Road Park and Ride site is closed, may serve your purposes. Your concerns as voiced to me have been submitted for Board review at the meeting to be held on October 26, 2018, 0900 hours at the Capitola City Council Chambers, 420 Capitola Avenue, Capitola City, CA 95010. If you require additional information, please call 426-6080.

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Shonoa Ruddick](#)
To: [Cayla Hill](#); [Ciro Aguirre](#); [Alex Clifford](#)
Subject: FW: Santa Cruz METRO Park & Ride
Date: Wednesday, October 24, 2018 8:22:22 AM
Attachments: [image001.png](#)
[image001.png](#)

From: Roberto Gwiazda [mailto:rgwiazda@gmail.com]
Sent: Tuesday, October 23, 2018 4:57 PM
To: Shonoa Ruddick <SRuddick@scmtd.com>
Subject: Re: Santa Cruz METRO Park & Ride

Hello Shonoa,

We have used the Quaker house but it ended up being not workable because there were few spaces on Friday if I recall correctly. The other places are out of town and out of the way for commuters going southbound on hwy 1, like us, or out of the way for bikers wanting to take the vanpool. The only place that may work is the church in State Park.

The time of the meeting is very inconvenient precisely for the people (commuters in the morning of a working day) who will be most affected by this change. I appreciate if you could forward my comments to the board as part of the public input to the final decision.

Yes, a temporary suspension of the closure until December would be helpful as it may allow us to find a more permanent arrangement. I personally would prefer if the lot is not full closed but ~20% of its space is left open for good

Thanks
Roberto

On Tue, Oct 23, 2018 at 4:05 PM Shonoa Ruddick <SRuddick@scmtd.com> wrote:

Re: Santa Cruz METRO Park & Ride

Thank you for contacting Santa Cruz Metropolitan Transit District.
We have received your concerns, both online and through our Customer Service line, and appreciate the opportunity to communicate with you.

I have included alternative Park & Ride Locations around the county, as an attachment.

Public comment may be posed, in person, at the below meeting.

Santa Cruz Metropolitan Transit District Board Meeting on October 26, 2018 at 420 Capitola Ave. Capitola, California @ 0900 hours.

We recognize that this change will create a hardship for some and ask if delaying the closure until December 31, 2018 would be helpful.

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

All comments and replies to this email, online, and by phone will be presented at the above board meeting.

Thank you.

Shonoa Ruddick

Safety, Security, & Risk Director
Interim Customer Service Manager
metro_logo_transparent

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Santa Cruz METRO](#)
To: [Cayla Hill](#)
Subject: [CSV-0000001372] P&R closure
Date: Tuesday, October 23, 2018 11:31:07 AM

Hello,

A new ticket has been added:

[CSV-0000001372](#)

ssudek@mbari.org wrote:

The park & ride at Soquel Avenue/Hwy1 is getting closed down on very short notice. I use it daily to get on a shuttle van to work in Moss Landing. There are 10-15 colleagues getting on 2-3 shuttle vans there. Looks like we will need to get back into our 10-15 cars and be part of clogging Hwy1 every morning. Seems like a step in the wrong direction.

Sebastian

Your Phone - Include Area Code: 831-775-2071

Preferred method of contacting you: Email address entered above

Your Address: 1544 7th Ave

Your City: Santa Cruz

Your State: CA

Your Zip: 95062

Nature of Comment: Complaint

Date of Incident: 10.23.2018

Time of Incident: n/a

Route: Not applicable

Choose location : Street & Cross street (enter below)

Location - additional information:

Vehicle Number - If Known:

Direction of Travel: Inbound

Employee Name or Number - If Known:

Employee Position: Not applicable

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Shonoa Ruddick](#)
To: [Cayla Hill](#)
Subject: FW: Santa Cruz METRO Park & Ride
Date: Wednesday, October 24, 2018 4:46:36 PM
Attachments: [image001.png](#)

From: Sebastian Sudek [mailto:ssudek@mbari.org]
Sent: Wednesday, October 24, 2018 9:52 AM
To: Shonoa Ruddick <SRuddick@scmttd.com>
Subject: Re: Santa Cruz METRO Park & Ride

Hi Shonoa,

thanks for getting back to me. I will note that none of the alternative locations you sent are anywhere close to the lot about to be closed. They will not work for us. Postponing the closure will help in the sense that it is a few more months before we become part of the problem on Hwy1.

best,
Sebastian

From: "Shonoa Ruddick" <SRuddick@scmttd.com>
To: "Shonoa Ruddick" <SRuddick@scmttd.com>
Sent: Tuesday, October 23, 2018 4:05:32 PM
Subject: Santa Cruz METRO Park & Ride

Re: Santa Cruz METRO Park & Ride

Thank you for contacting Santa Cruz Metropolitan Transit District. We have received your concerns, both online and through our Customer Service line, and appreciate the opportunity to communicate with you.

I have included alternative Park & Ride Locations around the county, as an attachment.

Public comment may be posed, in person, at the below meeting.

Santa Cruz Metropolitan Transit District Board Meeting on October 26, 2018 at 420 Capitola Ave. Capitola, California @ 0900 hours.

We recognize that this change will create a hardship for some and ask if delaying the closure until December 31, 2018 would be helpful.

All comments and replies to this email, online, and by phone will be presented at the above board meeting.

Thank you.

Shonoa Ruddick

**Safety, Security, & Risk Director
Interim Customer Service Manager**



Santa Cruz Metropolitan Transit District

110 Vernon Street
Santa Cruz, CA 95060
(831) 426-6080
<http://www.scmtd.com>

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Santa Cruz METRO](#)
To: [Cayla Hill](#)
Subject: [CSV-0000001373] Closure of Soquel park and ride
Date: Tuesday, October 23, 2018 11:37:07 AM

Hello,

A new ticket has been added:

[CSV-0000001373](#)

sbwilliams216@gmail.com wrote:

Hi,

I am writing to express my concern over the closure of the Soquel park and ride. I work in Moss Landing and regularly take a vanpool that uses this area as a pickup. It has been difficult with the expanding community in Live Oak to find areas appropriate for us to leave vehicles during the day, and this has been a good solution. Although this spot isnt perfect, my bike was stolen from there, and yes, it was locked, we need a safe, well-lit place to gather in order to vanpool to work. I see other vanpools such as Netflix also utilize the space. I am hopeful you can consider keeping it open and in order to help us reduce cars on the roadway.

Thanks,

Shannon Johnson, Live Oak resident.

Your Phone - Include Area Code: 8315880716

Preferred method of contacting you: Email address entered above

Your Address: 3711 Moana Way

Your City: Santa Cruz

Your State: CA

Your Zip: 95062

Nature of Comment: Inquiry

Date of Incident: 10.23.2018

Time of Incident: 6:30 am

Route: Not applicable

Choose location : Street & Cross street (enter below)

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

From: [Shonoa Ruddick](#)
To: [Ciro Aguirre](#); [Cayla Hill](#); [Alex Clifford](#)
Subject: FW: Santa Cruz METRO Park & Ride
Date: Wednesday, October 24, 2018 8:22:49 AM
Attachments: [image001.png](#)
[image001.png](#)

From: Shannon Williams [mailto:sbwilliams216@gmail.com]
Sent: Tuesday, October 23, 2018 4:43 PM
To: Shonoa Ruddick <SRuddick@scmttd.com>
Subject: Re: Santa Cruz METRO Park & Ride

Hi and thank you for your response!

I think delaying the closure until Dec. 31 would be awesome, this would give us time to plan for change!

Thanks again for your help,
Shannon

On Tue, Oct 23, 2018 at 4:05 PM Shonoa Ruddick <SRuddick@scmttd.com> wrote:

Re: Santa Cruz METRO Park & Ride

Thank you for contacting Santa Cruz Metropolitan Transit District. We have received your concerns, both online and through our Customer Service line, and appreciate the opportunity to communicate with you.

I have included alternative Park & Ride Locations around the county, as an attachment.

Public comment may be posed, in person, at the below meeting.

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We recognize that this change will create a hardship for some and ask if delaying the closure until December 31, 2018 would be helpful.

All comments and replies to this email, online, and by phone will be presented at the above board meeting.

Thank you.

Shonoa Ruddick
Safety, Security, & Risk Director
Interim Customer Service Manager

PUBLIC COMMENTS RECEIVED AFTER 10/22/18 BOARD POSTING

Paul Sweet Road Park & Ride Closure_Contact List

Name	Email	Phone	Address	Date of Contact
Sebastian Sudek	ssudek@mbari.org	831-775-2071	1544 7th Ave., Santa Cruz, CA 95062	10/23/2018
Kathleen Pitz	kpitz23@gmail.com	831-775-1894		10/23/2018
Shannon Williams	sbwilliams216@gmail.com	831-588-0716	3711 Moana Way, Santa Cruz, CA 95062	10/23/2018
John Ryan	John.Ryan555@gmail.com	831-428-1137	522 14th Ave., Santa Cruz, CA 95062	10/23/2018
Maria Hamilton	mhamilton@mbari.org	360-597-5660 831-708-9163/	326 Cayuga St., Santa Cruz, CA 95062	10/23/2018
Peter Walz	wape@mbari.org	831-775-1740	1587 Webster St., Santa Cruz, CA 95062	10/23/2018
Alana Sherman	alana.sherman@gmail.com	510-847-9624	513 Cabrillo Ave., Santa Cruz, CA 95065	10/23/2018
Roberto Gwiazda	rgwiazda@gmail.com	831-420-7554	112 Reno Way, Santa Cruz, CA 95060	10/23/2018
Diane Nelson		831-476-6090		10/23/2018
Peter Walz		831-775-1740		10/23/2018
Kim Fulton Bennett		831-775-1835		10/23/2018
Mariah Salisbury	mariah@mbari.org	831-775-1893		10/24/2018
Neil Conner	majordude19@yahoo.com	831-775-1989	2425 Paul Minnie Ave., Santa Cruz, CA 95062	10/24/2018

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Attachment B



**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (METRO)
PERSONNEL/HUMAN RESOURCES STANDING COMMITTEE AGENDA
MEETING MINUTES*
NOVEMBER 9, 2018 – 10:30 AM
METRO ADMIN OFFICES
110 VERNON STREET
SANTA CRUZ, CA 95060**

The Personnel/Human Resources Standing Committee convened a meeting as referenced above. The Meeting Agenda Packet can be found online at www.SCMTD.com and is available for inspection at Santa Cruz METRO's Administrative Office at 110 Vernon Street, Santa Cruz, California. *Minutes are "summary" minutes, not verbatim minutes. Audio recordings of Board meeting open sessions are available to the public upon request.

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@scmttd.com

COMMITTEE ROSTER

Director Ed Bottorff, Board Vice Chair	City of Capitola
Director Jimmy Dutra, Immediate Past Board Chair	City of Watsonville
Director Norm Hagen	County of Santa Cruz
Director John Leopold	County of Santa Cruz
Director Bruce McPherson, Board Chair	County of Santa Cruz
Alex Clifford	METRO CEO/General Manager
Julie Sherman	METRO District Counsel

CALL TO ORDER at 10:35 AM by Board Chair McPherson

ROLL CALL: The following Directors were **present**, representing a quorum:

Director Norm Hagen	County of Santa Cruz
Director John Leopold	County of Santa Cruz
Director Bruce McPherson, Board Chair	County of Santa Cruz

Directors Bottorff and Dutra were absent.

METRO EMPLOYEES AND MEMBERS OF THE PUBLIC WHO VOLUNTARILY INDICATED THEY WERE PRESENT (IN ALPHABETICAL ORDER) THROUGH A SIGN IN SHEET OR VERBAL INTRODUCTION WERE:

Holly Alcorn, SEIU	Joan Jeffries, SEIU
Shonoa Ruddick, METRO	

Attachment B

Personnel/Human Resources Standing Committee Meeting Minutes
November 9, 2018
Page 2 of 3

ADDITIONS OR DELETIONS FROM AGENDA/ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS

None

ORAL AND OTHER COMMUNICATIONS TO THE PERSONNEL/HUMAN RESOURCES STANDING COMMITTEE

None

RECOMMEND TO THE BOARD OF DIRECTORS THE CPS HR CONSULTING SEIU CLASSIFICATION STUDY, NEW POSITIONS DESCRIPTIONS AND TOTAL COMPENSATION METHODOLOGY

Alex Clifford, CEO/General Manager, introduced Angela Aitken, CFO and Acting HR Director, noting this agenda item is an update for the committee. The process is ongoing as not all of the meet and confers concerning position descriptions have been completed.

Ms. Aitken reiterated today's ask is for a recommendation from the Committee to the Board that the CPS HR Consulting SEIU Classification Study, new position descriptions and total compensation methodology be approved in concept. She noted a few of the differences between the management study and the SEIU study; i.e., seven agencies for management versus ten for SEIU, the logic behind recommending 5% below median for SEIU, as compared to median recommendation for managers (job responsibilities for a staff position would be relatively the same in a large agency as it would be in a small agency; i.e., mechanic. A Manager in a large agency would have a larger band of responsibility than a Manager in a smaller agency; i.e., Fleet Manager at METRO, one facility; Fleet Manager at VTA would have multiple sites and fleets.

CEO Clifford added that this initial methodology recommendation is consistent with what Metro has been doing, in that periodic SEIU reclass requests have included the, larger comparable properties as well as a salary 5% below median.

In response to Director Leopold's inquiries regarding the management study, Ms. Aitken and CEO Clifford responded that CPS has not yet responded to all employee inquires. METRO anticipates any changes to be within what is currently budgeted in the FY19 Operating Budget when this is presented to the Board on November 16th.

Public comment:

Eduardo Montesino, representing the bus and paratransit unions, asked that the Committee not "forget the little people". He cited the difficulties METRO is having recruiting ParaCruz operators and compared their starting salary to those at McDonalds. He expressed concern that the peer properties used in the study are not equitable and asked to see the comparables as he anticipates SEIU and management will receive increases.

Joan Jeffries, representing SEIU SEA, said they are opposed to making the recommendation at this point as the ten agencies used in this study are not the same used historically; e.g., SamTrans is not included. Additionally, the 95% is a relatively new practice that began in 2014 Accountant reclass. She asked that the Committee look at the numbers before making a recommendation, and not forward a recommendation at this time.

Michael Rios, PSA representative, echoed Ms. Jeffries' comments noting that the ten agencies were negotiated.

Olivia Martinez, SEIU representative, expressed her appreciation to Ms. Aitken and Mr. Aguirre for their teamwork on this. She then stated that this is the worst class and comp study she's been involved in over the past eight years. As a result, she is asking METRO to hold CPS accountable for the

9-03B.2

Attachment B

Personnel/Human Resources Standing Committee Meeting Minutes
November 9, 2018
Page 3 of 3

unprofessional work product; e.g., they have not responded to employees' questions, conducted horrible desk audits, etc. She stated that it is not okay to ask that the agencies agreed upon in the side letter agreement be changed. She asked that the Committee not agree with the recommendation regarding compensation methodology. She added that wages are a mandatory bargaining subject.

CEO Clifford reiterated today's subject was focused on job specifications. He recommends the Committee approve these in concept in order to move forward. Other conversations will follow. He added this is a total compensation process.

MOTION TO RECOMMEND FORWARDING THE CPS STUDY AND POSITION DESCRIPTIONS TO THE BOARD OF DIRECTORS, USING THE AGENCIES HEREIN, OBTAINING THE SALARY INFORMATION FOR 5% ABOVE MEDIAN, AT MEDIAN AND 5% BELOW MEDIAN IN ORDER TO OBTAIN BOARD APPROVAL IN CONCEPT.

MOTION: DIRECTOR LEOPOLD

SECOND: DIRECTOR HAGEN

MOTION PASSED WITH 3 AYES (Directors Hagen, Leopold and McPherson)

Directors Bottorff and Dutra were absent.

Meeting was adjourned at 11:15 AM by Board Chair McPherson Bottorff.

Respectfully submitted by,

Gina Pye
Executive Assistant

DRAFT

9-03B.3

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DATE: November 16, 2018
TO: Board of Directors
FROM: Thomas Hiltner, Grants/Legislative Analyst
SUBJECT: ACCEPT AND FILE QUARTERLY STATUS REPORT OF GRANT APPLICATIONS, ACTIVE GRANTS AND FUTURE OPPORTUNITIES JULY – SEPTEMBER 2018

I. RECOMMENDED ACTION

That the Board of Directors receives and files the quarterly report on grant applications and active grants. This is for information only. No action is required.

II. SUMMARY

- Staff submitted one formula and two discretionary grant applications for capital projects during the quarter
- Santa Cruz Metropolitan Transit District (METRO) received funding allocations from the California Transportation Commission (CTC) in October for buses and Intelligent Transportation System projects.
- METRO has pending applications for formula and discretionary grants totaling \$25,821,513.
- A list of METRO's applications (Attachment A), active grants (Attachment B) and a grant-funding outlook (Attachment C) are provided quarterly to apprise the Board of grant funding status.
- No action is required; this report is for information only.

III. DISCUSSION/BACKGROUND

During the quarter, METRO submitted applications for two discretionary grants:

- A proposal to build electric bus charging infrastructure with \$8 million from the US Department of Transportation's FY18 BUILD program, which will announce grant awards by 12/18/18.
- A proposal to purchase seven new CNG buses using \$2,950,000 in Federal Transit Administration (FTA) funding assistance. Unfortunately, the FTA did not choose this project for funding when it announced awards in September. METRO received funds from this program in 2017 to purchase four new CNG buses, and the FTA acknowledged that a recipient would not likely receive

grant awards from the same program in two consecutive years, as it intends to spread the wealth among as many recipients as possible.

As part of the local match for this FY18 FTA discretionary application , staff also submitted a formula funding application for \$671,079 in SB 1 State of Good Repair (SGR) funds. Because the discretionary grant was not awarded, the SGR formula funds will accrue to METRO's bus replacement fund for use as local match in other bus replacement funding opportunities.

On 10/18/18, the California Transportation Commission (CTC) allocated \$3.9 million in State Transportation Improvement Program (STIP) funds to initiate METRO's bus rehabilitation, bus replacement and ITS projects. Subsequently, the Board authorized purchase contracts for the bus replacements and the ITS projects at its 10/26/18 meeting.

This staff report apprises the Board of grant applications in progress (Attachment A), the awarded grants which fund METRO's operations and capital improvements (Attachment B) and foreseeable opportunities for new grant solicitations (Attachment C) based upon grant funding cycles.

IV. FINANCIAL CONSIDERATIONS/IMPACT

Formula awards during the quarter will contribute nearly \$11.3 million to METRO's FY19 operating and capital budgets.

V. ALTERNATIVES CONSIDERED

This is for information only and there are no alternatives to consider.

VI. ATTACHMENTS

Attachment A: Grant Applications as of November 2018

Attachment B: Active Grants as of November 2018

Attachment C: Future Grant Opportunities as seen in November 2018

Prepared by: Thomas Hiltner, Grants/Legislative Analyst

VII. APPROVALS:

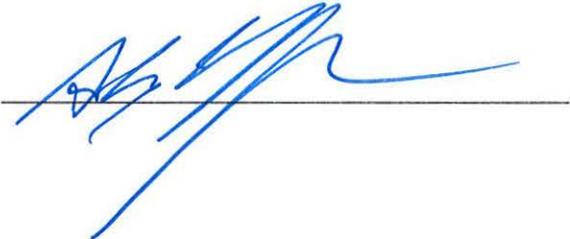
Barrow Emerson, Planning
and Development Director



Approved as to fiscal impact:
Angela Aitken, CFO



Alex Clifford, CEO/General Manager



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Attachment A

Santa Cruz METRO Grant Applications November 2018

Competitive Grant

Formula Grant

#	Project Description	Grant Funding Source	\$ Budget Total Project	\$ Budget Grant	\$ Budget Local Match / Source	Project Status
OPERATING Projects						
1	FY18 Urban Transit Operations	FY18 FTA 5307 Formula Operating Assistance Application: 9/30/20 Award: TBD	\$ 48,077,820	\$ 6,815,447	\$ 41,262,373	Submit Application in Trams
2	FY19 Rural transit operation	FY19 FTA 5311 Rural Operating Assistance Formula administered by Caltrans Application: 6/30/18 Award: TBD	\$ 474,936	\$ 180,962	\$ 293,974 Sales Tax	Submission Complete; Awaiting Caltrans contract
3	FY18 Rural transit operation	FY18 FTA 5311 Rural Operating Assistance Formula administered by Caltrans Application: 5/24/17 Award: TBD	\$ 688,567	\$ 174,321	\$ 514,246 Sales Tax	METRO executed the Caltrans contract 11/2/18.
End of OPERATING projects						
Capital Projects						
4	Solar Canopy and Battery Storage at Operations	FY18 BUILD Application: 7/18/18 Award: 12/18/18	\$ 10,871,000	\$ 10,676,170	\$ 75,000	Application submitted 7/18/18.
5	Local Match for bus projects	FY19 Caltrans State of Good Repair Application: 9/1/18 Award: 10/1/18	\$ 671,079	\$ 671,079	\$ - Fuel Credit	Funds available by 11/30/18 .

9-04A.1

Attachment A

#	Project Description	Grant Funding Source	\$ Budget Total Project	\$ Budget Grant	\$ Budget Local Match / Source	Project Status
6	Purchase 1 Electric Bus for Watsonville DAC - (year 2): Total budget uses FY17 + FY18 allocations plus HVIP voucher	FY18 Low Carbon Transit Operations Program (LCTOP) Application: 3/30/18 Award: 6/30/18	\$ 1,013,102	\$ 619,812	\$ 393,290	The Board approved a purchase contract for one Proterra battery-electric bus with nine options 2/23/18. Final Proterra specs accepted 10/5/18. Received approval from LCTOP program to purchase a bus with higher battery capacity for delivery in 2020 rather than purchasing the standard battery pack now.
7	2 ZEBs	CTC FY18 Local Partnership Program Application: 12/15/17 Award: 3/22/18	\$ 1,956,000	\$ 786,000	FY17 LCTOP; \$243,390; HVIP: \$150,000	The California Transportation Commission allocated \$1,656,000 in State funding or 2 battery-electric buses at its 10/18/18 meeting.
8	Refurbish 3 buses	CTC 2018 STIP Application: 10/17/17 Award: 3/22/18	\$ 1,016,605	LPP formula \$ 900,000	\$870k STIP; \$300k HVIP \$ 116,605	California Transportation Commission (CTC) allocated \$900,000 for this project at its 10/18/18 meeting.
9	Automatic Vehicle Locator	CTC 2018 STIP Application: 10/23/17 Award: 3/22/18	\$ 1,581,385	\$ 1,400,000	FY19 STA \$ 181,385	California Transportation Commission (CTC) allocated \$1,400,000 for this project at its 10/18/18 meeting.

9-04A.2

Attachment A

#	Project Description	Grant Funding Source	\$ Budget Total Project	\$ Budget Grant	\$ Budget Local Match / Source	Project Status
10	1 CNG Replacement Bus	FY13-17 Caltrans Discretionary FTA 5339 Program Expiration: TBD	\$ 537,595	\$ 456,956	\$ 80,639 Measure D	Caltrans contract anticipated by December 2018. BOD to authorize purchase contract with Gillig for new buses 8/24/18.
11	Various FY19 Capital Improvements	FTA FY18 \$5339(a) Bus and Bus Facilities Formula Program Application: 9/30/20 Award: TBD	\$ 596,725	\$ 596,725		Submit project application in TRAMS.
12	Bus Mid-Life Overhauls (4)	FTA FY17 \$5339(a) Bus and Bus Facilities Formula Program Application: 10/31/17 Award: Pending	\$ 160,000	\$ 160,000	Toll Credits	Application in review @ FTA. Has pre-award authority.
13	Fuel Management System	FTA FY17 \$5339(a) Bus and Bus Facilities Formula Program Application: 9/27/17 Award: Pending	\$ 180,000	\$ 180,000	Toll Credits	Application in review @ FTA. Has pre-award authority.
14	Golf Club Fire Escape	FTA FY17 \$5339(a) Bus and Bus Facilities Formula Program Application: 9/27/17 Award: Pending	\$ 97,523	\$ 97,523	Toll Credits	Application in review @ FTA. Has pre-award authority.
15	4 40' CNG replacement buses.	FTA FY17 \$5339(b) Bus and Bus Facilities Competitive Program Application: 8/25/17 Award: Spring 2018	\$ 2,413,036	\$ 1,206,518	\$ 1,206,518 Toll Credits	Awarded 4/5/18 with pre-award authority to spend. BOD authorized bus purchase contract with Gillig 8/24/18. Submit application in Trams by 12/31/18.

9-04A.3

Attachment A

#	Project Description	Grant Funding Source	\$ Budget Total Project	\$ Budget Grant	\$ Budget Local Match / Source	Project Status
16	Vouchers for 7 ZEBs	CALSTART Heavy-duty zero-emission Vehicle Incentive Program (HVIP) Application: Continuous	\$ 900,000	\$ 900,000	Bus Replacement Fund FY18 STA: \$535,439; FY18 SGR: \$671,079 \$ -	Voucher to be submitted by bus manufacturer.
	Total		\$ 71,115,543	\$ 25,821,513	\$ 45,294,030	
End of Applications						

9-04A.4

Attachment B

Santa Cruz METRO Active Grants November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match / Source	\$ Budget Total Project	Project Status/ Legislation
OPERATING Projects						
1	Watsonville Mural	FY18 Arts Council Santa Cruz Expiration: 12/31/18	\$ 2,700	\$ 3,900	\$ 6,600	Public favors restoration. Board updated on 6/22/18. ON HOLD.
2	Operate Watsonville Circulator	FY18 Air District 2018 AB2766 Program Expiration: 1/29/20	\$ 200,000	\$ 478,111 PAL (\$900); Cash Reserves	\$ 678,111	Grant awarded 9/21/17. Contract with Air District executed 1/29/18.
3	FY19 operating assistance	FY19 SCCRTC TDA-LTF formula allocation Expiration: NA	\$ 7,074,858	Sales Tax \$ 7,074,858	\$ 14,149,716	SCCRTC approved claim 5/3/18.
4	FY19 operating and capital assistance	FY19 State Transit Assistance (TDA-STA) Application: 4/1/18 Award: 5/3/18	\$3,540,904	\$ - Fare Revenue; Sales Tax	\$ 3,540,904	SCCRTC approved claim 5/3/18.
End of OPERATING Projects						

Attachment B

Santa Cruz METRO Active Grants November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match / Source	\$ Budget Total Project	Project Status/ Legislation
CAPITAL Projects						
5	CNG Bus Replacements [Match to FTA5339(b)]	Caltrans FY18 STA-State of Good Repair (STA-SGR) Expiration	\$671,079	\$ 1,741,957 FTA FY17 5339(b): \$1,206,518 FY18 Bus Replacement Fund	\$ 2,413,036	RTC pays quarterly
6	Purchase 1 Electric Bus for Watsonville DAC	FY17 LCTOP Low Carbon Transit Operations Program combined with FY18 LCTOP \$619,812 to meet purchase price Expiration: 6/30/21 est.	\$ 243,290		\$ 1,013,102 FY18 LCTOP (\$619,812) HVIP (\$150,000)	FY17 LCTOP + FY18 LCTOP funds + HVIP for 1 Proterra bus.
7	Purchase 1 Electric Bus for Watsonville DAC	FY16 LCTOP Low Carbon Transit Operations Program Formula 5/27/19, Expenditure deadline; Grant Expiration: 11/27/19	\$ 709,292	NA; [HVIP] \$ 357,216	\$ 1,066,508	Awarded: 6/13/16. Advance payment received. Board authorized contract w/Clemson, SC for Proterra buses.

Attachment B

Santa Cruz METRO Active Grants November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match / Source	\$ Budget Total Project	Project Status/ Legislation
8	Comprehensive Security and Surveillance to purchase CCTV, lighting, generator replacement	FY17 Proposition 1B California Transit Security Progra Expires: 3/30/2019	\$ 352,404	\$ -	\$ 352,404	This is the last installment of the CA Transit Security Grants Program. Received payment 11/14/17.
9	1 CNG Bus	SCCRTC FY17 Surface Transportation Block Grant program Expiration: 6/30/21	\$ 500,000	None	\$ 588,887	Board authorized contract with Gilliag on 8/24/18 to purchase bus with 9 options.
10	11 ParaCruz Vans	FTA FY15/FY16 5339(a) Bus and Bus Facilities Formula Program Expires: 7/1/19, milestone	\$ 816,000	PTMISEA, \$70k [expires 6/30/22] Bus Replacement Fund, \$ 122,240 Toll Credit 76380;	\$ 938,240	11 Ford T350 Vans @ \$75,233.23 = \$827,565.53 received.
11	Facilities: Vernon x-planter	FTA FY15/FY16 5339(a) Bus and Bus Facilities Formula Program 7/1/19 project completion	\$ 9,200	\$ -	\$ 9,200	Project complete

Attachment B

Santa Cruz METRO Active Grants November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match / Source	\$ Budget Total Project	Project Status/ Legislation
12	Facilities: WTC Landscape	FTA FY15/FY16 5339(a) Bus and Bus Facilities Formula Program 7/1/19 project completion	\$ 30,000	\$ -	\$ 30,000	Project complete
13	Fleet fire escape. Construction support	FTA FY15/FY16 5339(a) Bus and Bus Facilities Formula Program 7/1/19 project completion	\$ 20,000	\$ - Toll Credit;	\$ 20,000	Design engineering in progress.
14	Facilities Improvements. Bus stop holding	FTA FY15/FY16 5339(a) Bus and Bus Facilities Formula Program 7/1/19 project completion	\$ 14,180	\$ - Toll Credit;	\$ 14,180	In progress.
15	3 Electric replacement buses for Highway 17 Express	FTA FY16 \$5339(c) LoNo 3/30/18 Receive buses 6/28/19 Complete Project Expires: none	\$ 3,810,348	\$ 1,126,164 Toll Credit;	\$ 4,936,512	FTA approved hold until suitable over-the-road battery-electric bus is available.
16	Comprehensive Security and Surveillance Camera on bus	FY16 CA Transit Security Grant Program (CTSGP) funds from Cal-OES Expiration: 3/31/19	\$ 440,505	\$ - None	\$ 440,505 Alt Fuel Tax [\$551,136] PTMISEA [\$575,028]	Received payment 8/18/17

Attachment B

Santa Cruz METRO Active Grants November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match / Source	\$ Budget Total Project	Project Status/ Legislation
16	Pacific Station right-of-way acquisition and Construction	FY15 Public Transportation Modernization, Infrastructure and Service Enhancement Act (PTMISEA) Expiration: 6/30/22	\$ 1,551,333	\$ -	\$ 1,551,333	Amendment 1, 10/19/16: MetroBase <\$1,411,247>; Bus and Facilities <\$1,002,244> Amendment 2 approved 6/9/18: MetroBase <\$1,675,000>
17	Pacific Station Roof Construction	FY15 Public Transportation Modernization, Infrastructure and Service Enhancement Act (PTMISEA) Expiration: 6/30/22	\$ 350,000	\$ -	\$ 350,000	Engineering and cost estimate in progress.
18	Purchase One ParaCruz Expansion Van for Elderly/Disabled program beyond ADA requirements.	FY15 Caltrans FTA 5310 Elderly & Handicapped mobility program 5/17 In Service Expiration: 3/1/26	\$ 63,000	\$ 5,367	\$ 68,367	Grant contract executed w/Caltrans 3/15/16. Arrived.
19	Propane Mule	FY14 FTA 5339 Formula Allocation Award: 8/14/17 Expiration: 7/1/19 , milestone	\$ 46,602	\$ 13,398	\$ 60,000	Tow motor is operating in fleet support. Project complete.
				Alt Fuel Tax Alt Fuel [\$1,747]	\$ 53,415	

Attachment B

Santa Cruz METRO Active Grants November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match / Source	\$ Budget Total Project	Project Status/ Legislation
20	Bus Mid-Life Overhaul, 7 @ \$39,513.70 ea.	FY14 FTA 5339 Formula Allocation Award: 8/14/17 Expires: 6/30/19, milestone	\$ 221,277	\$ 55,319	\$ 276,596	7 engine overhauls completed.
21	Bucket truck	FY14 FTA 5339 Formula Allocation Award: 8/14/17 Expiration: 7/1/19, milestone	\$ 75,318	\$ 22,496 STA	\$ 97,814	Bucket truck is operating in facilities support. Project complete.
22	Bus Repaint, 36 @ 3,628.10 ea.	FY14 FTA 5339 Formula Allocation Expiration: 3/31/19, milestone	\$ 105,467	Alt Fuel Tax \$ 26,367	\$ 131,834	Grant CA-2017-038 in Trams awarded 8/14/17.
23	Relocate Mechanics Sink	FY14 FTA 5339 Formula Allocation Award: 8/14/17 Expiration: 7/1/19, milestone	\$ 7,638	\$ 1,910 STA	\$ 9,548	Grant CA-2017-038 in Trams.
24	Relocate Exhaust Evacuation Hose Reel	FY14 FTA 5339 Formula Allocation Award: 8/14/17 Expiration: 7/1/19, milestone	\$ 6,400	Alt Fuel Tax \$ 1,600	\$ 8,000	Grant CA-2017-038 in Trams.

Attachment B

Santa Cruz METRO Active Grants November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match / Source	\$ Budget Total Project	Project Status/ Legislation
25	Non-Revenue Vehicles.	FY13 Caltrans 5339 Formula Allocation Expires: 7/29/18 , grant	\$ 171,023	\$ 42,756	\$ 213,779	Project complete.
26	Repaint 20 Buses	FY13 Caltrans 5339 Formula Allocation Expires: 7/29/18 , grant	\$ 69,494	STA \$ 17,374	\$ 86,868	Project complete.
27	Resurface Scotts Valley, Vernon, Soquel P&R Lots	FY13 Caltrans 5339 Formula Allocation Expires: 7/29/18 , grant	\$ 60,000	\$ 15,000 STA	\$ 75,000	Project complete.
28	MetroBase: Judy K. Souza Operations Facility construction	FY12 Proposition 1B State and Local Partnership Program (SLPP) California Transportation Commission Expires: 6/30/18	\$ 5,812,000	\$ 5,812,000 Sales Tax	\$ 11,624,000	Project complete.
29	MetroBase development, Judy K. Souza Operations Facility	FY10 - 13, FY15 Public Transportation Modernization, Infrastructure and Service Enhancement Act (PTMISEA) Expires: 6/30/22	\$ 15,096,394	\$ -	\$ 15,096,394	Project complete.

Attachment B

Santa Cruz METRO Active Grants November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match / Source	\$ Budget Total Project	Project Status/ Legislation
30	Pacific Station expansion and renovation architectural services	FY08 FTA 5309 CA-04-0102 Expires: 9/30/19	\$ 490,000	\$ 122,500	\$ 612,500	FTA approved extension through 9/30/19 to continue related design studies.
31	Pacific Station expansion and renovation architectural services	FY06 FTA 5309 CA-04-0021 Expire: 9/30/19	\$ 396,000	\$ 99,000 Reserves	\$ 495,000	FTA approved extension through 9/30/19 to continue related design studies.
		Total	\$ 42,956,707	\$ 17,228,419 Reserves	\$ 61,008,353	

End of Active Grants

Attachment C

Santa Cruz METRO Future Grant Opportunities seen November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match	Program / Status	Stakeholders
OPERATING Projects						
1	FY19 Urbanized Area transit operating assistance	FY19 FTA 5307 Urbanized Area Operating Assistance Forumula Apportionment: 10/1/18	~\$6,200,000	~6,200,000	Continuing FY18 budget resolution through 12/7/18.	BOD; Finance; CEO
End of OPERATING Projects						
CAPITAL Projects						
1	Capital Projects; buses & facilities	FY2019 FEMA Transit Security Grant Program Application: May 2019	TBD	TBD	Call for Projects in June, 2019	Finance; Fleet; Facilities; CEO; BOD
2	Capital Projects; buses	FY20 & FY21 CTC Local Partnership Program FORMULA funds	\$ 605,000	\$ 605,000	Call for Projects in June, 2019	Finance; Fleet; Facilities; CEO; BOD
3	Purchase Zero Emission Buses	VW Settlement	TBD	TBD	CTA ZEB working group;	BOD; Finance; CEO
4	Discounts for electric bus purchase	CALSTART Heavy-duty zero-emission Vehicle Incentive Program (HVIP) Application: Continuous	~\$150,000 per new electric bus	\$ -	Continuous application process. Requires contract for zeb bus purchase.	SCCRTC; AMBAG; Legislative Coalition

Attachment C

Santa Cruz METRO Future Grant Opportunities seen November 2018

Competitive Grant
Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match	Program / Status	Stakeholders
5	Discounts for electric bus charging infrastructure	CALSTART Heavy-duty zero-emission Vehicle Incentive Program (HVIP) Application: Continuous	~\$30,000 in infrastructure funds for every new battery-electric bus	\$ - None	Continuous application process. Requires contract for zeb bus purchase.	SCCRTC; AMBAG; Legislative Coalition
6	Affordable housing, Pacific Station or Watsonville; Expanded transit service w/electric buses	Affordable Housing and Sustainable Communities Program (AHSC); \$150 Million Statewide Proposal:2019	\$1,000,000 - \$8,000,000	\$ - None	Form partnership w/affordable housing non-profit. Requires transit capital improvement w/in 1/2 mile or new/expanded transit service.	Watsonville City Council; Santa Cruz Economic Development Department; Planning; METRO BOD; AMBAG; RTC; County Economic Development
7	Purchase electric buses and associated charging infrastructure for revenue service.	California Energy Commission's Alternative and Renewable Fuel and Vehicle Technology Program Application: TBD	\$2,000,000 - \$5,000,000	Unknown TBD	Monitor	MBUAPCD; CTA; BOD; Legislative Coalition
8	Purchase electric bus 2020 and associated charging infrastructure for revenue service.	FY19 Low Carbon Transit Operations Program, ~\$500,000 Application: 3/1/2019	\$ 500,000	Unknown	METRO apportionment based upon statewide allocation of \$50 million.	SCCRTC; TAMC; MST; Caltrans; AMBAG; MBUAPCD; CARB

Santa Cruz METRO
 Future Grant Opportunities seen November 2018

Competitive Grant

Formula Grant

#	Project Description	Funding Source	\$ Budget Grant	\$ Budget Local Match	Program / Status	Stakeholders
9	Pacific Station renovation	FY19 US DOT BUILD ~ \$500 - \$1,000 million Nationwide	\$ 12,000,000	\$ 3,000,000	Nationwide budget est. ~\$500 million	Public Works; Chip; Greyhound
10	Advanced Farebox Technology	5339(a,b); 5307; dedicated technology grant	TBD	Partnership; AHSC TBD	Upgrade fareboxes to accommodate chip reader, radio xmit	METRO BOD; Fleet Maint; Planning
End of Future Grant Opportunities						

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DATE: November 16, 2018
TO: Board of Directors
FROM: Daniel Zaragoza, Operations Manager, Paratransit Division
SUBJECT: ACCEPT AND FILE THE METRO PARACRUZ OPERATIONS STATUS REPORT FOR JULY, AUGUST AND SEPTEMBER 2018

I. RECOMMENDED ACTION

That the Board of Directors accept and file the quarterly METRO ParaCruz Operations Status Report for July, August and September 2018

II. SUMMARY

- Summary review of monthly operational statistics for ParaCruz:
Comparing the monthly statistics of FY18 to the monthly statistics of FY19:
 - In July, the number of ParaCruz rides increased by 251
 - In August, the number of ParaCruz rides increased by 19
 - In September, the number of ParaCruz rides decreased by 443
- Summary of monthly operational information about ParaCruz:
 - July number of total ParaCruz rides: 5,805
 - August number of total ParaCruz rides: 5,937
 - September number of total ParaCruz rides: 6,098

III. DISCUSSION/BACKGROUND

Comparing June 2018 statistics to July 2018, ParaCruz rides increased by 367 rides. Comparing July 2018 statistics to August 2018, ParaCruz rides increased by 132 rides. Comparing August 2018 statistics to September 2018, rides increased by 161 rides.

ParaCruz is currently funded for 30 Paratransit Operators. Seven of these positions are vacant; and, of these vacancies, four Operators have recently been promoted to (Fixed Route) Bus Operators.

ParaCruz is currently recruiting to fill the open Paratransit Operator positions with the following strategies:

- An advertisement in a weekly Spanish language newspaper that will feature the story of one of our Operators.
- We are hiring! Cards were created to pass out to the public.

- Extensive outreach with assistance from UTU has also been ongoing at different public events and locations.

METRO ParaCruz is the federally mandated ADA complementary paratransit program of the Santa Cruz Metropolitan Transit District, providing shared ride, door-to-door demand-response transportation to customers certified as having disabilities that prevents them from independently using the fixed route bus.

IV. COORDINATION

This staff report has been coordinated with statistics provided by the Finance and Fleet Departments. Additional data was provided by the Eligibility Coordinator and Candis Almanza, Paratransit Supervisor.

V. FINANCIAL CONSIDERATIONS/IMPACT

There are no financial considerations for this report.

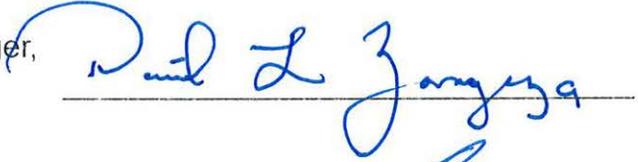
VI. ATTACHMENTS

- Attachment A:** ParaCruz On-time Performance Charts for July, August and September 2018
- Attachment B:** Comparative Operating Statistics Tables for July, August and September 2018
- Attachment C:** Number of Rides Comparison Chart
- Attachment D:** Total Ride vs. Shared Ride Chart
- Attachment E:** Annual Miles Comparison Chart
- Attachment F:** Monthly Assessments

Prepared by: Daniel Zaragoza, Operations Manager, Paratransit Division

VII. APPROVALS

Daniel Zaragoza, Operations Manager,
Paratransit Division



Alex Clifford, CEO/General Manager



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Attachment A

ParaCruz On-time Performance Report

	July 2017	July 2018
Total pick ups	5,651	5,805
Percent in “ready window”	78.29%	81.40%
1 to 5 minutes late	6.09%	6.08%
6 to 10 minutes late	4.76%	4.20%
11 to 15 minutes late	3.31%	2.96%
16 to 20 minutes late	2.57%	2.08%
21 to 25 minutes late	1.43%	1.31%
26 to 30 minutes late	1.13%	.88%
31 to 35 minutes late	.90%	.59%
36 to 40 minutes late	.53%	.34%
41 or more minutes late (excessively late/missed trips)	.99%	.16%
Total beyond “ready window”	21.71%	18.60%

On-time Performance

During July, ParaCruz on time performance increased 3.11% from last year, due to continued improvements in scheduling and dispatching procedures. July has a decrease of 5.10% from last month. Ridership increased from last month. ParaCruz hired a new class of three Operators. ParaCruz had one Operator promoted to Dispatcher/Scheduler. ParaCruz has two Operators on long term disability. The total number of available working ParaCruz Operators is twenty-one per weekday, not including Operators on Annual Leave.

A Customer Service Report is either a compliment, comment, or a complaint.

During the month of July 2018, ParaCruz received six (6) Customer Service Reports. One complaint was valid: a late ride. Three (3) of the reports were non-valid complaints: one regarding an Operator speeding; the vehicle AVL showed the Operator was obeying the speed limit. One regarding a passenger wanting to sit in a seat that was occupied by another passenger. And, one complaint regarding an Operator that could not make change. Two (2) were compliments for ParaCruz Operators.

Attachment A

	August 2017	August 2018
Total pick ups	5,918	5,937
Percent in “ready window”	83.52%	84.77%
1 to 5 minutes late	5.27%	5.56%
6 to 10 minutes late	3.90%	3.37%
11 to 15 minutes late	2.48%	2.46%
16 to 20 minutes late	1.86%	1.45%
21 to 25 minutes late	1.06%	.86%
26 to 30 minutes late	.57%	.67%
31 to 35 minutes late	.54%	.49%
36 to 40 minutes late	.22%	.30%
41 or more minutes late (excessively late/missed trips)	.56%	.07%
Total beyond “ready window”	16.48%	15.23%

On-time Performance

During August, ParaCruz on time performance increased 2.25% from last year, due to continued improvements in scheduling and dispatching procedures. August has an increase of 3.37% from last month. Ridership increased this month. ParaCruz added three Operators who have completed training. ParaCruz had one Operator retire. ParaCruz had two Operators on long term disability. The total number of available working ParaCruz Operators is twenty-three per weekday, not including Operators on Annual Leave.

A Customer Service Report is either a compliment, comment, or a complaint.

During the month of May 2018, ParaCruz received two (2) Customer Service Reports. One (1) was valid regarding a late ride. One (1) was a compliment for a ParaCruz Operator.

Attachment A

	September 2017	September 2018
Total pick ups	6,541	6,098
Percent in “ready window”	81.87%	81.88%
1 to 5 minutes late	5.82%	6.36%
6 to 10 minutes late	4.07%	4.48%
11 to 15 minutes late	2.83%	2.64%
16 to 20 minutes late	1.80%	1.75%
21 to 25 minutes late	1.19%	1.00%
26 to 30 minutes late	.89%	.80%
31 to 35 minutes late	.41%	.54%
36 to 40 minutes late	.47%	.30
41 or more minutes late (excessively late/missed trips)	.64%	.25%
Total beyond “ready window”	18.13%	18.12%

On-time Performance

During September, ParaCruz on time performance slightly increased .01% from last year, due to continued improvements in scheduling and dispatching procedures. June has a decrease of 2.89% from last month. Ridership increased from last month. ParaCruz has four Operators on long term disability. The total number of available working ParaCruz Operators is twenty per weekday, not including Operators on Annual Leave.

A Customer Service Report is either a compliment, comment, or a complaint.

During the month of September 2018, ParaCruz received three (3) Customer Service Reports. One (1) was valid: a Customer Service Representative made a booking error for the wrong day. One (1) was non-valid: a client felt the driver asked too many questions. One (1) was a compliment to an Operator.

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Attachment B

Comparative Operating Statistics through July 2018

	July 2017	July 2018	FY 18	FY 19	Performance Averages	Performance Goals
Requested	6,398	6,500	6,398	6,500	6,876	
Performed	5,651	5,805	5,651	5,805	6,029	
Cancels	22.41%	21.05%	22.41%	21.05%	21.55%	
No Shows	3.24%	3.48%	3.24%	3.48%	3.49%	Less than 3%
Total miles	47,578	48,549	47,578	48,549	51,175	
Av trip miles	6.36	6.34	6.36	6.34	6.27	
Within ready window	78.29%	81.40%	78.29%	81.40%	85.61%	90.00% or better
Call center volume	5,236	5,173	5,236	5,173	N/A	New phone system 1/6/18
Hold times less than 2 minutes	92.1%	96.10%	92.1%	96.10%	N/A	Greater than 90%
Distinct riders	670	668	670	668	638	
Most frequent rider	53 rides	56 rides	53 rides	56 rides	51 rides	
Shared rides	68.2%	66.0%	68.2%	66.0%	60.65%	Greater than 60%
Passengers per rev hour	1.99	1.93	1.99	1.93	1.85	Greater than 1.6 passengers/hour
Rides by supplemental providers	N/A	N/A	N/A	N/A	N/A	No more than 25%
Vendor cost per ride	N/A	N/A	N/A	N/A	N/A	
Rides < 10 miles	62.34%	61.88%	62.34%	61.88%	63.14%	
Rides > 10	37.66%	38.12%	37.66%	38.12%	36.62%	
Denied Rides	0	0	0	0	0	Zero
Missed Trips	56	9	56	9	12	
Excessively Long Trips	2	4	2	4	2	New Stat Jan 2017
# Trips at Base Fare	4,212	3,625	4,212	3,625	3,929	
# Trips > Base Fare	1,439	1,079	1,439	1,079	1,245	

Attachment B

Comparative Operating Statistics through August 2018

	August 2017	August 2018	FY 18	FY 19	Performance Averages	Performance Goals
Requested	6,588	6,598	12,986	13,098	6,877	
Performed	5,918	5,937	11,569	11,742	6,031	
Cancels	21.34%	20.23%	21.87%	20.64%	21.46%	
No Shows	3.22%	4.14%	3.23%	3.81%	3.57%	Less than 3%
Total miles	51,011	50,216	98,589	98,674	51,109	
Av trip miles	6.36	6.29	6.36	6.25	6.26	
Within ready window	83.52%	84.77%	80.97%	83.10%	85.71%	90.00% or better
Call center volume	5,408	5,601	10,664	10,774	N/A	New phone system 1/6/18
Hold times less than 2 minutes	92.3%	93.48%	92.2%	94.8%	N/A	Greater than 90%
Distinct riders	683	698	859	883	639	
Most frequent rider	60rides	73 rides	108 rides	125 rides	52 rides	
Shared rides	64.4%	61.3%	66.2%	63.5%	60.39%	Greater than 60%
Passengers per rev hour	1.89	1.85	1.94	1.89	1.84	Greater than 1.6 passengers/hour
Rides by supplemental providers	N/A	N/A	N/A	N/A	N/A	No more than 25%
Vendor cost per ride	N/A	N/A	N/A	N/A	N/A	
Rides < 10 miles	64.06%	62.88%	64.48%	62.38%	63.04%	
Rides > 10	35.04%	37.12%	35.52%	37.62%	36.80%	
Denied Rides	0	0	0	0	0	Zero
Missed Trips	33	4	89	13	7	N/A
Excessively Long Trips	0	2	2	6	3	New Stat Jan 2017
# Trips Base Fare	4,482	3,682	8,694	7,307	3,862	
# Trips > Base Fare	1,436	1,078	2,875	2,157	1,215	

Attachment B

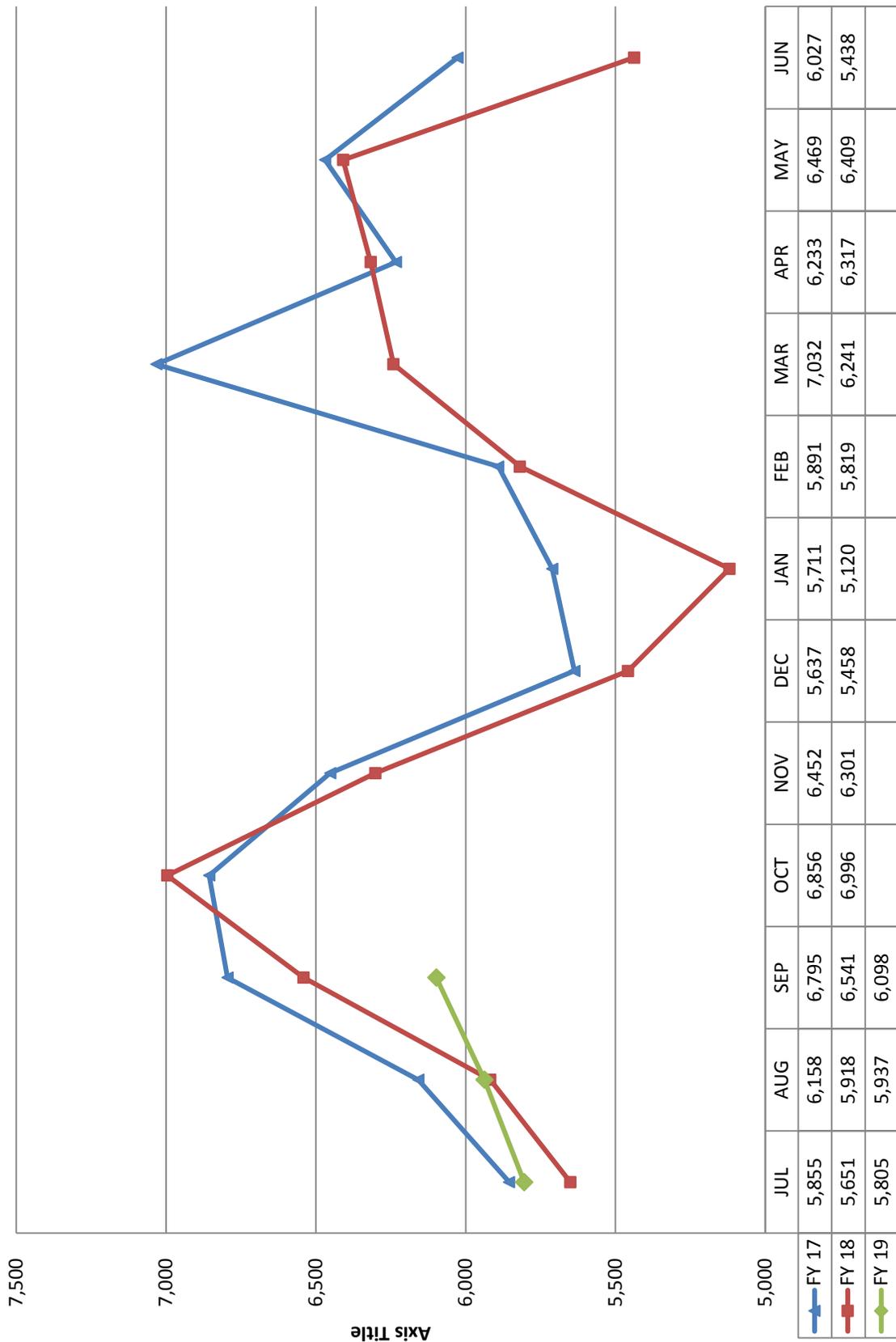
Comparative Operating Statistics through September 2018

	Sept 2017	Sept 2018	FY 18	FY 19	Performance Averages	Performance Goals
Requested	7,221	6,916	20,207	20,014	6,852	
Performed	6,541	6,098	18,110	17,840	5,994	
Cancel	20.38%	21.79%	21.34%	21.04%	21.58%	
No Shows	3.23%	3.64%	3.23%	3.75%	3.60%	Less than 3%
Total miles	51,532	51,513	150,121	150,181	51,100	
Av trip miles	5.92	6.28	6.20	6.30	6.29	
Within ready window	81.87%	81.88%	81.29%	82.68%	85.71%	90.00% or better
Call center volume	5,589	5,387	16,223	16,161	N/A	New phone system 1/6/18
Hold times less than 2 minutes	92.2%	94.59%	92.2%	74.72%	N/A	Greater than 90%
Distinct riders	717	680	1,018	1726	636	
Most frequent rider	46 rides	59 rides	145 rides	144 rides	53 rides	
Shared rides	70.1%	65.9%	67.6%	64.2%	60.04%	Greater than 60%
Passengers per rev hour	2.01	1.90	1.97	1.90	1.83	Greater than 1.6 passengers/hour
Rides by supplemental providers	N/A	N/A	N/A	N/A	N/A	No more than 25%
Vendor cost per ride	N/A	N/A	N/A	N/A	N/A	
Rides < 10 miles	63.09%	61.95%	63.98%	62.24%	62.94%	
Rides > 10 miles	36.91%	38.05%	36.02%	37.76%	36.89%	
Denied Rides	0	0	0	0	0	Zero
Missed Trips	42	15	131	28	8	N/A
Excessively Long Trips	2	1	4	7	2	New Stat Jan 2017
# Trips Base Fare	4,800	3,837	13,494	11,144	3,782	
# Trips > Base Fare	1,741	1,111	4,616	3,268	1,163	

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Attachment C

Number of Rides Comparison

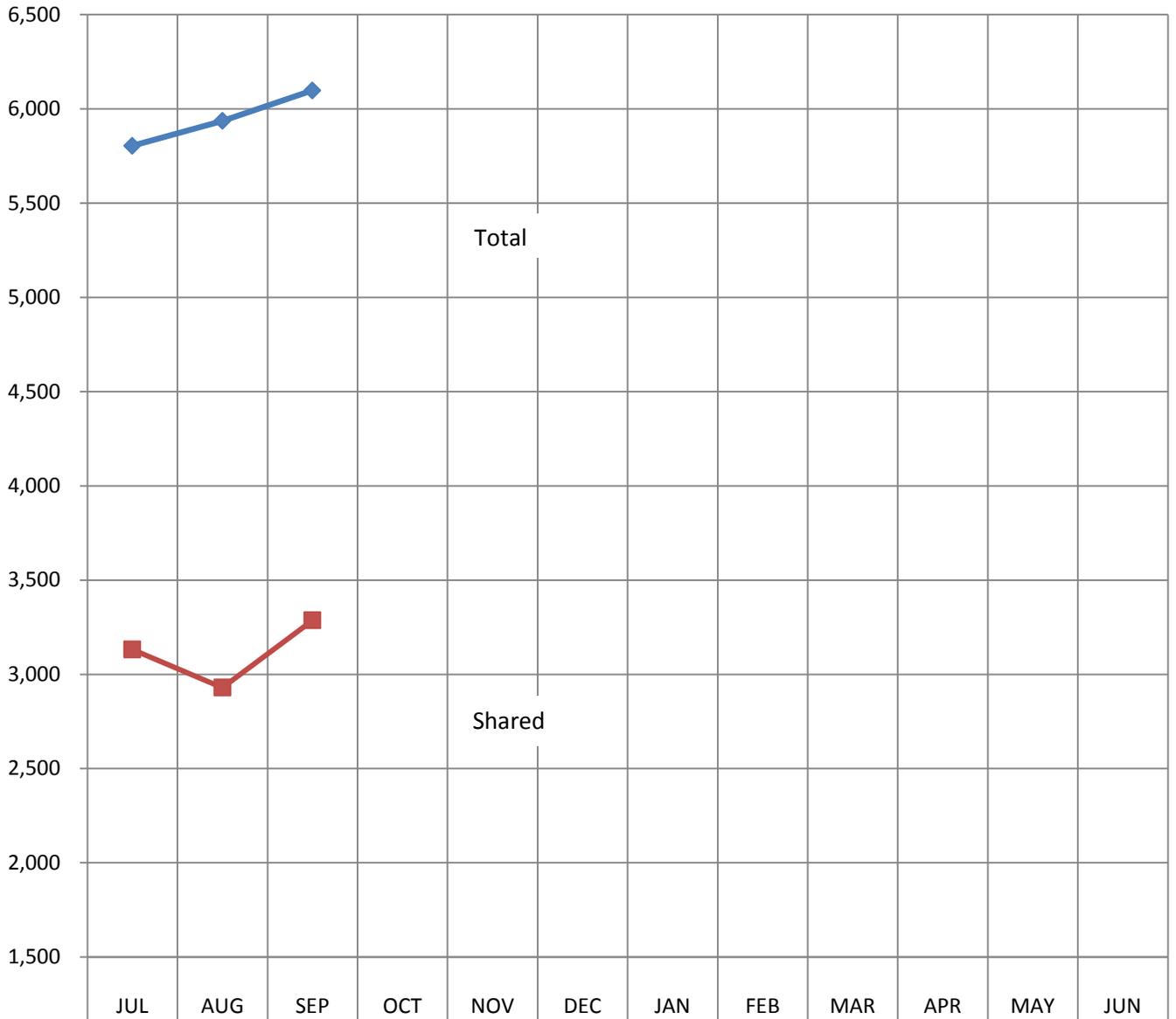


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Attachment D

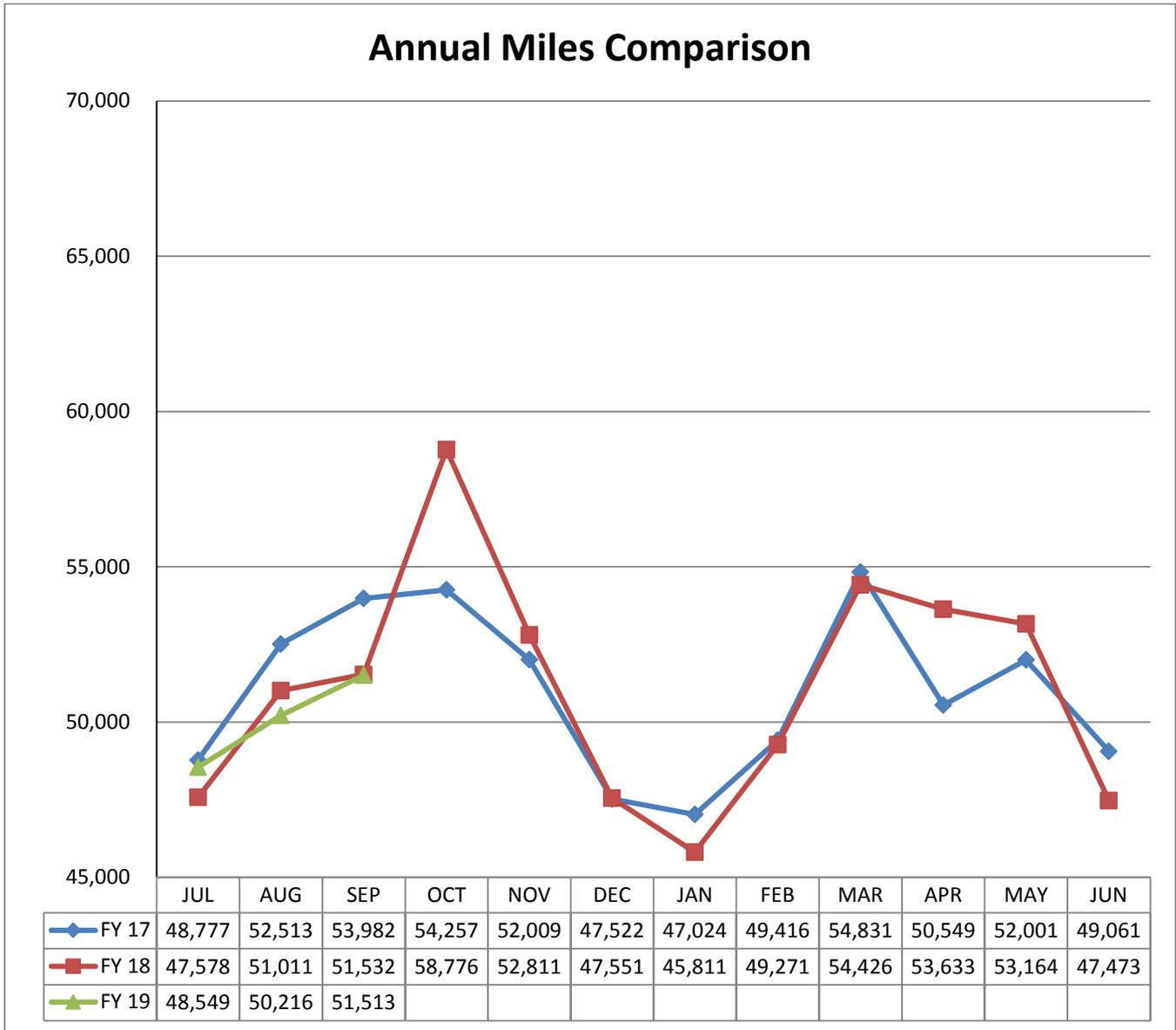
Total Ride vs. Shared Ride Count



Total Rides	5,805	5,937	6,098									
Shared Rides	3,132	2,930	3,287									

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Attachment E



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Attachment F

Monthly Assessments

MONTHLY ASSESSMENTS						
	UNRESTRICTED	RESTRICTED CONDITIONAL	RESTRICTED TRIP BY TRIP	TEMPORARY	DENIED	TOTAL
OCTOBER 2017	30	0	2	2	0	34
NOVEMBER 2017	21	0	0	0	0	21
DECEMBER 2017	29	0	0	1	0	30
JANUARY 2018	22	0	1	1	0	24
FEBRUARY 2018	33	0	0	2	0	35
MARCH 2018	45	0	1	1	0	47
APRIL 2018	35	0	0	0	0	35
MAY 2018	33	0	0	1	0	34
JUNE 2018	37	0	1	0	0	38
JULY 2018	47	0	0	1	0	48
AUGUST 2018	37	0	3	2	0	42
SEPTEMBER 2018	35	0	0	2	0	37

Number of Eligible Riders for the month of July 2018 = 3,555

Number of Eligible Riders for the month of August 2018 = 3,655

Number of Eligible Riders for the month of September 2018 = 3,675

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DATE: November 16, 2018
TO: Board of Directors
FROM: Barrow Emerson, Planning & Development Director
SUBJECT: METRO SYSTEM RIDERSHIP REPORTS FOR THE FIRST QUARTER OF FY19

I. RECOMMENDED ACTION

Accept and file the METRO system ridership report for the first quarter of FY19

II. SUMMARY

- This report contains ridership summaries and ridership by route for Santa Cruz Metropolitan Transit District (METRO) fixed route bus service for the first quarter (Q1) of FY19 (July 1 – September, 2018).
- Attachment A shows system-wide and college student ridership statistics for Q1 of FY19 and makes comparisons with ridership statistics from Q1 of FY18.
- Attachment B shows the average ridership and pass/fare usage per route and system-wide.
- Quarterly ridership reports are provided to keep the Board of Directors apprised of METRO's ridership statistics and ridership trends.

III. DISCUSSION/BACKGROUND

FY19 Q1 total fixed-route ridership increased 0.2% compared to FY18 Q1.

Reason(s) include:

- Local ridership increased 0.4%. Ridership on the local route was 89.9% of total fixed route ridership.
 - College student bus pass programs apply only to our local routes and are the primary source of METRO's steady ridership stats this quarter.
 - Student pass usage increased 6.3%
 - UCSC ridership increased 3.6%
 - Cabrillo ridership increased 18.1%
 - Non-Student ridership on our local system decreased 3.4%
- Highway 17 ridership decreased 1.7%. Ridership on the commuter route was 10.1% of total fixed route ridership.

Reason(s) include:

- Highway 17 peak traffic volumes exceed the capacity of the roadway and the congestion on the freeway causes trip delays leading to unreliable service.

- High rates of car ownership allow more people access to a vehicle for commuting and are further contributing to congestion.
 - For the third straight year California annual vehicle sales will exceed 2 million.
- Increased telecommuting results in less riders commuting daily.
 - Highway 17 Day pass and 15-Ride pass usage increased 3% and 1%, respectively. While, 31-Day passes decreased 8% for the second consecutive quarter supporting the assumption that less commuters are using this service every weekday.

Quarterly Discounted Pass and Cash Fare usage increased 1.4% and decreased 0.7%, respectively.

- Discounted ridership had an increase of 131 separate discounted fare or pass transactions and this segment of ridership on our fixed route service is holding steady.
- Paracruz ridership decreased 1.4% in this same time-frame.

Quarterly Regular Pass and Cash Fare totals decreased 4.9% and 5.8%, respectively.

Reason(s) include:

- Loss of discretionary riders.
 - Slower speeds due to street and highway congestion. Caltrans Average Annual Daily Traffic Counts show that the volume of cars on Highway 1 increased by 10% over the last 6 years.
 - Increased car ownership rates across the U.S. are higher than before the recession among all households, but especially among low-income consumers – those most likely to ride the bus.
 - AB60 passed in 2015, allowing undocumented residents to acquire drivers' licenses. The number of drivers' licenses issued per capita in 2016 in Santa Cruz County increased 4.5% from 2014, where this metric was stable in prior years.

Attachment B shows average ridership per trip for all weekday and weekend routes in Q4 of FY18. System-wide, on average there are 25 riders per trip on weekdays and 30 riders per trip weekends.

- The weekday routes with the highest ridership average is Route 15
 - This route serves UCSC via Laurel West. This is likely due to the implementation of articulated buses along this route, which have a greater capacity than the 40 ft. buses that serve other UCS routes.
- The weekend route with the highest ridership average are routes 16 and 20.

- These routes serve Laurel East and the West Side. The route 16 is usually the sole route with the highest average ridership per trip on weekends. The increase in on the route 20 may indicate an increasing demand for service on the West Side of Santa Cruz on weekends.
- The weekday route with the lowest ridership average is Route 34.
 - This route serves South Felton during the SLVUSD school term. This route will be removed after the SLV school district starts their winter break.
- The weekend route with the lowest ridership average is Route 79.
 - This route serves Pajaro/East Lake.

IV. FINANCIAL CONSIDERATIONS/IMPACT

Revenue derived from passenger fares and passes is reflected in the FY19 operating budget.

V. ALTERNATIVES CONSIDERED

There are no alternatives to consider.

VI. ATTACHMENTS

Attachment A: Quarterly System Ridership Summary for FY19 Q1 (July 1 – September 30, 2018)

Attachment B: Quarterly Average Ridership by Route Report for FY19 Q1 (July 1 – September 30, 2018)

Prepared by: Cayla Hill, Planning Analyst

VII. APPROVALS

Barrow Emerson,
Planning and Development Director



Alex Clifford, CEO/General Manager



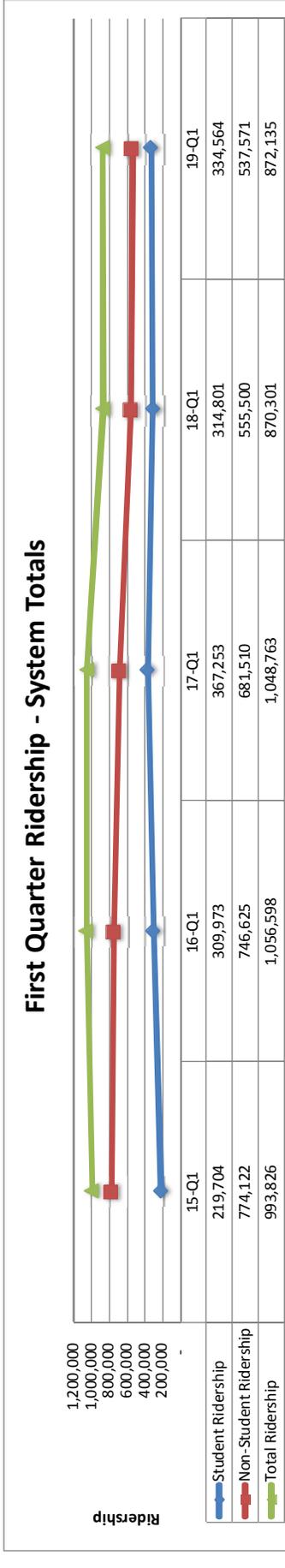
Quarterly System Ridership Summary

FY19 Q1 (July 1, 2018 - September 30, 2018)

Calendar Operating Days		Discounted Pass Usage (Senior/Disabled)			Regular Pass Usage		
This Year	Last Year	FY19 Q1	FY18 Q1	% Change	This Year	Last Year	% Change
65	65	103,196	103,949	-0.7%	111,440	118,052	-5.6%
27	27				26,806	28,393	-5.6%
2	2				8,572	7,842	9.3%
24	24				2,860	3,051	-6.3%
Total Pass Usage					149,678	157,338	-4.9%

Discounted Cash Usage (Senior/Disabled)		Regular Cash Usage	
This Year	Last Year	This Year	Last Year
57,658	56,301	2.4%	165,566
5,857	6,330	-7.5%	33,588
63,515	62,631	1.4%	199,154

Quarterly System Totals		Quarterly Student Pass Totals	
FY19 Q1	FY18 Q1	% Change	FY19 Q1
803,881	800,840	0.4%	256,630
68,254	69,461	-1.7%	58,171
872,135	870,301	0.2%	314,801



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Quarterly Average Ridership by Route Report

July 1, 2018 - September 30, 2018		Average Weekday Ridership per Trip				Average Weekend Ridership per Trip					
Route	Corridor	Total Riders	UCSC Riders	Cabrillo Riders	Discount Fares and Passes	Regular Passes	Total Riders	UCSC Riders	Cabrillo Riders	Discount Fares and Passes	Regular Passes
UCSC											
10	UCSC via High St.	33	28	0	1	2	24	21	0	2	1
15	UCSC via Laurel West	71	69	0	0	1					
16	UCSC via Laurel East	41	37	0	1	1	30	26	0	1	1
19	UCSC via Lower Bay	40	34	1	2	1	28	24	0	2	1
20	UCSC via West Side	34	25	1	2	3	30	23	0	2	2
20D	UCSC via West Side Supp.	44	43	0	0	0					
22	UCSC/Coastal Science Campus	44	43	0	0	0					
Intercity											
35/35A	Santa Cruz/Scotts Valley/SLV	16	1	1	4	5	19	0	1	6	4
69A	Capitola Road/Watsonville	28	1	2	9	5	23	1	1	7	3
69W	Cap. Road/Cabrillo/Watsonville	31	2	6	7	5	24	2	2	7	4
71	Santa Cruz to Watsonville	29	1	5	8	5	25	1	2	8	4
91X	Santa Cruz/Watsonville Express	16	1	7	3	2					
Rural											
33	Lompico SLV/Felton Faire	7	0	1	1	3					
34	South Felton	2	0	0	0	0					
40	Davenport/North Coast	15	0	1	2	5					
41	Bonny Doon	11	1	0	2	3					
42	Davenport/Bonny Doon	15	2	0	2	4	12	2	0	3	3
Local											
3	Mission/Beach	9	2	1	3	2	7	2	0	3	1
4	Harvey West/Emeline	17	1	1	7	5					
55	Rio Del Mar	13	0	5	4	2	9	0	1	4	2
66	Live Oak via 17th	14	1	1	4	3	12	1	0	5	2
68	Like Oak via Broadway/Portola	12	1	1	4	3	10	1	1	3	2
72	Watsonville Hospital/Pinto Lake	14	0	1	5	2	10	0	0	4	1
74S	PVHS/Watsonville Hospital	15	0	0	2	2					
75	Green Valley Road	17	0	1	7	2	15	0	1	7	2
79	Pajaro/East Lake	6	0	1	2	1	5	0	0	2	1
Highway 17											
Hwy 17	Hwy 17 Express	15	-	-	1	6	17	-	-	1	2
Avg. Ridership per Trip		22	11	1	3	3	18	6	1	4	2

23 Calendar School Days of SJSU
 24 Calendar School Days of Cabrillo
 2 Calendar School Days of UCSC

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DATE: November 16, 2018
TO: Board of Directors
FROM: Isaac Holly, IT and ITS Director
SUBJECT: CONSIDERATION OF AUTHORIZING THE CEO TO EXECUTE A CONTRACT WITH GIRO, INC. FOR HASTUS SOFTWARE MAINTENANCE AND SUPPORT

I. RECOMMENDED ACTION

That the Board of Directors authorize the CEO to execute a contract with GIRO, Inc. to renew Hastus (Version 2009) maintenance and support services in the amount of \$80,241 for the 2019 calendar year

II. SUMMARY

- On November 17, 2017, the Board of Directors approved a contract renewal with Giro, Inc. for Hastus software maintenance and support for the 2018 calendar year.
- This maintenance contract needs to be renewed annually in order to continue to receive the following for this mission-critical Santa Cruz Metropolitan Transit District (METRO) system:
 - Unlimited support via telephone and email
 - Bug fixes and customization for the current Hastus version
 - Eligibility for new Hastus versions at a reduced license cost

III. DISCUSSION/BACKGROUND

Hastus is a unified software environment that enables METRO to:

- Report monthly and annual service stats to the National Transit Database (NTD) to remain eligible for FTA funding
- Plan new service changes accurately and efficiently
- Assign work to Operators and deploy them to and from the field
- Accurately compute Operator pay and schedule leave
- Track Operator performance and track license and medical certificate renewal

- Publish accurate timetables to print and web media
- Provide a data feed to the Google Transit Trip Planner

Prior to the current Hastus version, METRO was running an earlier version of Hastus with just the scheduling related modules. METRO identified a need to replace its aging, text-based dispatch system so in 2009 a grant opportunity became available via ARRA (American Reinvestment and Recovery Act). This grant funded the upgrade and expansion to the current Hastus version at the time with additional modules to allow for a complete scheduling and dispatch management system. METRO was then able to retire the legacy dispatch system. The cost for this new unified system, licensed for a fleet of 80 peak vehicles, (the number of buses in service at one time) including integration and customization, was \$1.4M.

Giro's maintenance schedule is based on calendar year and needs to be renewed on a yearly basis. On November 17, 2017, the Board of Directors approved a contract with Giro, Inc. which allowed the execution of a Hastus maintenance and support contract for the 2018 calendar year. This contract expires at the end of December 2018. The 2019 maintenance and support contract currently being presented is based on the following deployed software modules:

- Hastus-Vehicle (Service schedules)
- Hastus-Crew (Operator work creation)
- CrewOpt (Automated crew scheduling)
- Hastus-Roster (Period rosters for personnel)
- Minbus (Automated vehicle blocking)
- Geo (Geocoding of stops and route itineraries)
- Bid (Operator work selection)
- Hastus-Daily (Operations daily vehicle and crew management)
- SelfService (Operator web access to their work assignments)
- EPM (Operator Discipline and award management)

This maintenance contract includes five days' worth of software development time to allow for further customizations as new needs are identified. If these days are not used, they may be carried over into the next year.

Staff recommends that the Board of Directors authorize the CEO to execute a maintenance and support contract with Giro, Inc. for Hastus software in the amount of \$80,241 for the 2019 calendar year.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The funding in the amount of \$80,241 is included in the FY19 current fiscal year's IT Department Operating budget within the Maintenance Fees (503352) account.

V. ALTERNATIVES CONSIDERED

- Do nothing. There is no alternative recommended at this time. Hastus is a critical foundation to the core functions of the scheduling and deployment of METRO service. Not renewing this contract for maintenance and support services would result in losing the eligibility to receive technical support and updates, as well as incurring additional cost towards the purchase of future versions of Hastus.
- Going out to bid for a new system of this magnitude is not feasible at this time due to the lack of a viable alternative and budget to support it. METRO is in the process of evaluating alternative systems that offer similar functionality.

VI. ATTACHMENTS

Attachment A: Giro Hastus Maintenance and Support Contract

Prepared by: Isaac Holly, IT and ITS Director

VII. APPROVALS:

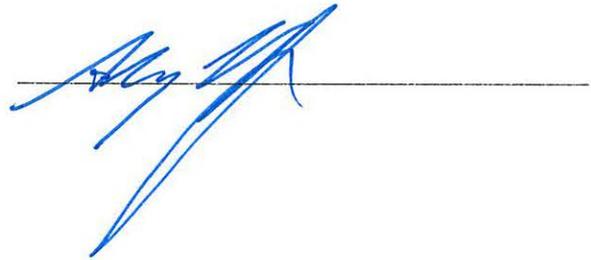
Isaac Holly, IT and ITS Director



Approved as to fiscal impact:
Angela Aitken, CFO



Alex Clifford, CEO/General Manager



Attachment A

HASTUS
MAINTENANCE AND SUPPORT CONTRACT
(Reference number: 617-12)

ENTERED INTO BETWEEN:

GIRO INC./LE GROUPE EN INFORMATIQUE ET RECHERCHE OPÉRATIONNELLE, having its principal place of business at 75, Port-Royal Street East, Suite 500, in the city of Montreal, Province of Quebec, Canada, H3L 3T1.

(hereinafter referred to as "GIRO")

AND:

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT, having its principal place of business at 110 Vernon Street, Santa Cruz, California, USA 95060.

(hereinafter referred to as the "Client")

FOR:

The software *HASTUS-Vehicle*, *HASTUS-Crew*, *CrewOpt*, *HASTUS-Roster*, *Minbus*, *Geo*, *Bid*, *HASTUS-DailyCrew*, *HASTUS-DailyVehicle*, *SelfService*, and *EPM* version 2009 (hereinafter referred to as "Software") used by the Client for the operation of a maximum of eighty (80) peak vehicles (for *EPM* module, allows management of a maximum of ninety (90) non-driving employees).

Starting on January 1, 2019 (the "Commencement Date") for one (1) year.

1. SERVICES PROVIDED

GIRO will provide the Client with the following services beginning on the Commencement Date of this Agreement specified above and conditionally on payment of annual charges for support and maintenance as defined in Section 2:

1.1 GIRO will assign, in a maximum delay of twenty-four (24) hours, an employee to correct a Software defect, once the Client has provided GIRO with a detailed description of the said defect. For the purposes of this Agreement, a defect is considered to exist when the Software does not perform according to the description given in the appropriate version of the User Guide and online help and when the said defect affects the performance of the Software. Correction of any problems due to one or several of the following causes is excluded from this Agreement: an accident, a disaster, faulty use of Software, inappropriate use of the Software, additions and/or modifications (including changes to system setting files) which are made to the Software by other than GIRO's personnel except if these additions and/or modifications have been done with prior approval by GIRO, a change to an unsupported version of the operating system or database management system, and failure to supply the necessary facilities for correct operation of the Software.

1.2 Electronic mail and telephone support are available from Monday to Friday inclusively from 9 a.m. to 5 p.m. (Eastern Standard Time) excluding Québec public holidays.

1.3 When the *Geo* module is included in the Software, the support required to assist in one annual conversion of the geographical data is included. However, any Software modification required for the data conversion is not covered by this Agreement and the additional costs will be invoiced.

1.4 GIRO will provide the Client with a bank of five (5) person-days of GIRO staff time. This time can be used to perform tests on system operation, to make minor modifications to the Software, to train personnel on the Client's premises, and to approve additions and/or modifications made by the Client. The use of these staff days is determined by the Client. Non-used days can be accumulated and used in subsequent years as long as this Agreement is renewed by the Client without interruption. The time needed by GIRO personnel to perform modifications requested by the Client under this Agreement and that are not defects as defined in the present Agreement will be deducted from this bank. If there are no remaining person-days available in the bank, therefore the time necessary to perform any work requested by the Client under this Agreement except for work required for defects as defined in this Agreement, will be charged to the Client by GIRO according to current rates for GIRO personnel.

Attachment A

1.5 Availability for the Client, without additional licence fees, of all additions and improvements made to the Software by GIRO for other customers, excluding new modules or new products. These improvements or additions to the Software could be a new report, a new command or a new function. If requested by the Client, they can be adapted and/or installed by GIRO on the Client's version of the Software without any additional licence fees related to their purchase. New versions of the Software up to release 2011 are also available without additional licence fees. Charges relative to the installation of these additions, improvements or new version by GIRO, if applicable, will be payable by the Client and invoiced separately. Any charges relative to third party software licences are also payable by the Client.

1.6 A 20% discount on the licence fee is accorded to the Client when a new module of *HASTUS* is added to *HASTUS-Vehicle* and *HASTUS-Crew*. This discount is valid only if the Client has maintained a Maintenance and Support Contract without interruption since the initial installation of the Software.

2. TERMS AND CONDITIONS

2.1 For services specified in Section 1, the Client will pay GIRO a fee of \$80,241 US. The total amount is payable when the Agreement comes into effect.

2.2 The annual fee includes the following direct expenses: telephone charges, fax and courier incurred by GIRO during the provision of the services specified in this Agreement. Travel and living expenses that may be incurred are not included.

2.3 All charges quoted or understood in the present Agreement will be increased as necessary to reflect any applicable taxes in effect at the time that the monies become due.

2.4 The Client will supply GIRO with a method to access the installed Software remotely for maintenance and support purposes.

2.5 GIRO undertakes not to reveal any of the Client's confidential information acquired during product installation and support activities without the express authorization of the Client.

2.6 Any *HASTUS* maintenance and support contract previously signed between the Client and GIRO is hereby rescinded.

The Client acknowledges that he has read this Agreement, understood it, and has agreed to be bound by its terms and conditions. Further, he agrees that it is the complete and exclusive statement of the Agreement between the parties and that it supersedes all proposals or prior Agreements, oral or written, and all other communications between the parties relating to its subject matter.

At Montreal, this 5th day of September 2018

GIRO INC./LE GROUPE EN INFORMATIQUE ET RECHERCHE OPÉRATIONNELLE

Per:

Name: Annie Gagné

Title: Director, Business Relations

Signature: 

Duly authorized, as she so declares.

At _____, this ____ day of _____.

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Per:

Name: _____

Title: _____

Signature: _____

Duly authorized, as he/she so declares.



DATE: November 16, 2018
TO: Board of Directors
FROM: Angela Aitken, CFO and Acting HR Director
**SUBJECT: CONSIDERATION OF AWARD OF CONTRACT TO CLAREMONT
BEHAVIORAL SERVICES FOR EMPLOYEE ASSISTANCE PROGRAM
SERVICES NOT TO EXCEED \$26,000**

I. RECOMMENDED ACTION

- 1) That the Board of Directors authorize the CEO to execute a contract with Claremont Behavioral Services for Employee Assistance Program Services in an amount not to exceed \$26,000 for a three (3)-year period, with options to extend the contract for a total term of seven (7) years.**
- 2) That the Board of Directors authorize the CEO to execute future amendments with Claremont Behavioral Services for the options to extend, increasing the contract total for each option period as required, not to exceed a total value of \$62,500 for the full seven (7) years.**

II. SUMMARY

- The Santa Cruz Metropolitan Transit District (METRO) has a need for Employee Assistance Program Services.
- A formal request for proposals was conducted to solicit proposals from qualified firms. One firm submitted a proposal for METRO's review.
- The Interim HR Manager notified UTU and SEIU about the change in contract with no opposition.
- A two-member evaluation team comprised of METRO staff reviewed and evaluated the proposals, and is recommending an award to Claremont Behavioral Services.

III. DISCUSSION/BACKGROUND

Employee Assistance Programs ("EAPs") are intended to help employees deal with personal and work-related problems that might adversely impact their job performance, health, and well-being. They provide an opportunity for all METRO employees and their dependents to obtain confidential professional counseling, assessment and referral services in an effort to address problems relating, but not limited, to marriage and family, psychological health, substance abuse, financial difficulties, and legal issues. METRO's current provider for EAP services is Managed Health Network. This contract has been in effect since

December of 2012, and will expire on November 30, 2018 with no further options to renew.

On September 7, 2018, METRO legally advertised and distributed Request for Proposals (RFP) No. 19-03 to twenty-two firms, posted notice on its website, and sent email notices to all GovDelivery subscribers. On October 19, 2018, one proposal was received and opened from Claremont Behavioral Services. A two-member evaluation team comprised of METRO staff has reviewed and evaluated the proposal.

The evaluation team used the following criteria as contained in the Request for Proposals:

Evaluation Criteria	Points
Qualifications and recent experience	30
Understanding of and technical approach to Program requirements	30
Quality of relevant experience of key staff	20
Experience with government agencies	15
References	15
Cost proposal	30
Total Points Possible	140

Staff is recommending the following actions: 1) that the Board of Directors authorize the CEO to execute a three (3)-year contract on behalf of METRO with Claremont Behavioral Services for Employee Assistance Program Services in an amount not to exceed \$26,000; and 2) that the Board of Directors authorize the CEO to execute two (2) future contract extensions with Claremont Behavioral Services for two additional two (2)-year terms, for a total anticipated contract value not to exceed \$62,500 and a total term not to exceed seven (7) years.

Contractor will provide all services meeting all METRO's specifications and requirements of the contract. Angela Aitken, CFO and Acting HR Director, will serve as the Contract Administrator and will ensure contract compliance.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The base value of the contract is \$26,000 for the first three (3) years. Should both of the two-year options be exercised, the total seven (7)-year value of the contract is anticipated to be no more than \$62,500. Funds to support this

contract are included in the Human Resources FY19 –FY22 Other Fringe Benefits (502999) Operating budget. The Department Manager will be responsible for budgeting this expense each fiscal year.

V. ALTERNATIVES CONSIDERED

- Do not award this contract. Staff does not recommend this option, as studies indicate that offering an Employee Assistance Program may result in various benefits for the employer, including lower medical costs, reduced turnover and absenteeism, and higher employee productivity.

VI. ATTACHMENTS

Attachment A: Contract with Claremont Behavioral Services

Note: A full copy of the Contract is available on request.

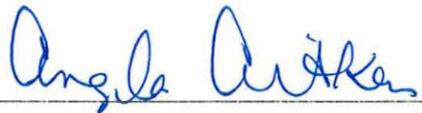
Prepared by: Joan Jeffries, Administrative Specialist

VII. APPROVALS:

Angela Aitken, CFO and Acting
HR Director



Approved as to fiscal impact:
Angela Aitken, Chief Financial Officer



Alex Clifford, CEO/General Manager



Attachment A

PROFESSIONAL SERVICES CONTRACT FOR EMPLOYEE ASSISTANCE PROGRAM SERVICES (19-03)

THIS CONTRACT is made effective on December 1, 2018 between the SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (“Santa Cruz METRO”), a political subdivision of the State of California, and CLAREMONT BEHAVIORAL SERVICES (“Contractor”).

1. RECITALS

1.1 Santa Cruz METRO’s Primary Objective

Santa Cruz METRO is a public entity whose primary objective is providing public transportation and which has its principal office at 110 Vernon Street, Santa Cruz, California 95060.

1.2 Santa Cruz METRO’s Need for Employee Assistance Program Services

Santa Cruz METRO has the need for Employee Assistance Program Services. In order to obtain these services, Santa Cruz METRO issued a Request for Proposals, dated September 7, 2018, setting forth specifications for such services. The Request for Proposals is attached hereto and incorporated herein by reference as Exhibit A.

1.3 Contractor’s Proposal

Contractor is a firm qualified to provide Employee Assistance Program Services and whose principal place of business is 1050 Marina Village Parkway, Suite 203, Alameda, California 94501. Pursuant to the Request for Proposals issued by Santa Cruz METRO, Contractor submitted a proposal for Employee Assistance Program Services, which is attached hereto and incorporated herein by reference as Exhibit B

1.4 Selection of Contractor and Intent of Contract

On October 29, 2018, Santa Cruz METRO selected Contractor as the offeror whose proposal was most advantageous to Santa Cruz METRO to provide the Employee Assistance Program Services described herein. This Contract is intended to fix the provisions of these services.

Santa Cruz METRO and Contractor agree as follows:

2. INCORPORATED DOCUMENTS AND APPLICABLE LAW

2.1 Documents Incorporated in this Contract

The documents listed below are attached to this Contract and by reference made a part hereof. This is an integrated Contract. This writing constitutes the final expression of the parties’ Contract, and it is a complete and exclusive statement of the provisions of that

Attachment A

Contract, except for written amendments, if any, made after the date of this Contract in accordance with Section 12.15 of the General Conditions to the Contract.

A. Exhibit A

Santa Cruz METRO's "Request for Proposals" dated September 7, 2018, including Addendums No. 1 and No. 2.

B. Exhibit B (Contractor's Proposal)

Contractor's Proposal to Santa Cruz METRO for Employee Assistance Program Services, signed by Contractor and dated October 19, 2018.

C. Exhibit C

Contractor's Cost Proposal for option years 6-7, and additional detail on Contractor's Substance Abuse Professional (SAP) Service.

2.2 Conflicts

Where in conflict, the provisions of this writing supersede those of the above-referenced documents, Exhibits A, B and C. Where in conflict, the provisions of Exhibit A supersede Exhibit B and the provisions of Exhibit C supersede Exhibit B.

2.3 Recitals

The Recitals set forth in Article 1 are part of this Contract.

3. DEFINITIONS

3.1 General

The terms below (or pronouns in place of them) have the following meaning in the Contract:

3.1.1 **CONTRACT** - The Contract consists of this document, the attachments incorporated herein in accordance with Article 2, and any written amendments made in accordance with Part IV, Section 12.15 of the General Conditions to the Contract.

3.1.2 **CONTRACTOR** - The Contractor selected by Santa Cruz METRO for this project in accordance with the Request for Proposals issued September 7, 2018.

3.1.3 **CONTRACTOR'S STAFF** - Employees of Contractor.

3.1.4 **DAYS** - Calendar days.

3.1.5 **OFFEROR** - Contractor whose proposal was accepted under the terms and conditions of the Request for Proposals issued September 7, 2018.

Attachment A

3.1.6 PROVISION - Any term, agreement, covenant, condition, clause, qualification, restriction, reservation, or other stipulation in the Contract that defines or otherwise controls, establishes, or limits the performance required or permitted by either party.

3.1.7 SCOPE OF WORK (OR “WORK”) - The entire obligation under the Contract, including, without limitation, all labor, equipment, materials, supplies, transportation, services, and other work products and expenses, express or implied, in the Contract.

4. TIME OF PERFORMANCE

4.1 Term

The term of this Contract will be for a period not to exceed **three (3) years** and shall commence upon the execution of the Contract by Santa Cruz METRO.

At the option of Santa Cruz METRO, this Contract agreement may be renewed for **two (2) additional two (2) year** terms.

5. COMPENSATION

5.1 Terms of Payment

Santa Cruz METRO shall compensate Contractor in an amount not to exceed the amounts/rates agreed upon by Santa Cruz METRO. Santa Cruz METRO has selected the “3 Visit Plan” option at a rate of \$2.25 per employee per month. Santa Cruz METRO shall reasonably determine whether work has been successfully performed for purposes of payment. Compensation shall be made within thirty (30) days of Santa Cruz METRO’s written approval of Contractor’s written invoice for said work. Contractor understands and agrees that if it exceeds the **\$26,000** maximum amount payable under this Contract, it does so at its own risk.

5.2 Invoices

Contractor shall submit invoices with a purchase order number provided by Santa Cruz METRO on a monthly basis. Expenses shall only be billed if allowed under the Contract.

Said invoice records shall be kept up-to-date at all times and shall be available for inspection by Santa Cruz METRO (or any grantor of Santa Cruz METRO, including, without limitation, any State or Federal agency providing project funding or reimbursement) at any time for any reason upon demand for not less than four (4) years after the date of expiration or termination of the Contract. Under penalty of law, Contractor represents that all amounts billed to Santa Cruz METRO are (1) actually incurred; (2) reasonable in amount; (3) related to this Contract; and (4) necessary for performance of the project.

Attachment A

6. NOTICES

All notices under this Contract shall be deemed duly given upon delivery, if delivered by hand, or three (3) days after posting if sent by registered mail, receipt requested, to a party hereto at the address hereinunder set forth, or to such other address as a party may designate by notice pursuant hereto.

Santa Cruz METRO

Santa Cruz Metropolitan Transit District
110 Vernon Street
Santa Cruz, CA 95060

Attention: Alex Clifford, CEO

CONTRACTOR

Claremont Behavioral Services
1050 Marina Village Parkway, Suite 203
Alameda, CA 94501

Attention: William Taylor, Director of Operations
(510) 995-1111
wtaylor@claremonteap.com

7. ACCEPTANCE OF ELECTRONIC SIGNATURES AND COUNTERPARTS

The parties agree that this Contract, agreements ancillary to this Contract, and related documents to be entered into this Contract will be considered executed when the signature of a party is delivered by scanned image as an attachment to electronic mail. Such scanned signature must be treated in all respects as having the same effect as an original signature. Each party further agrees that this Contract may be executed in two or more counterparts, all of which constitute one and the same instrument.

8. AUTHORITY

Each party has full power and authority to enter into and perform this Contract and the person signing this Contract on behalf of each has been properly authorized and empowered to enter into this Contract. Each party further acknowledges that it has read this Contract, understands it, and agrees to be bound by it.

Attachment A

Signed on _____

Santa Cruz METRO –
SANTA CRUZ METROPOLITAN TRANSIT
DISTRICT

Alex Clifford, CEO/General Manager

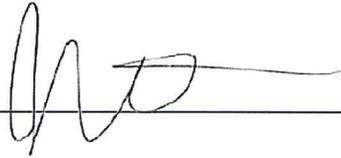
Contractor –
CLAREMONT BEHAVIORAL SERVICES

Tom Farris, President

A handwritten signature in blue ink, appearing to be 'Tom Farris', written over a horizontal line.

Approved as to Form:

Julie A. Sherman, General Counsel

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DATE: November 16, 2018
TO: Board of Directors
FROM: Angela Aitken, CFO
SUBJECT: CONSIDERATION OF RESOLUTION APPROVING THE FY19 REVISED CAPITAL BUDGET

I. RECOMMENDED ACTION

That the Board of Directors adopt a resolution approving the FY19 Revised Capital Budget, as presented in Attachment B

II. SUMMARY

- The Board of Directors (Board) adopted the FY19 Capital Budget on June 22, 2018.
- Periodic capital budget revisions may be required due to new grant awards, new projects, changes to the scope of existing projects, spending and removal of projects that are no longer needed.
- Revisions to an adopted capital budget require Board approval and the adoption of a resolution.

III. DISCUSSION/BACKGROUND

The Board must adopt an Operating and Capital Budget by June 30th each year. The Board adopted the FY19 & FY20 Operating and FY19 Capital Budget on June 22, 2018.

This will be the first revision to the FY19 Capital Budget since it was adopted.

Staff requests that the Board adopt a resolution (Attachment A) to approve the FY19 Revised Capital Budget (Attachment B)

A Reconciliation by Project as of November 16, 2018 (Attachment C) is provided; this reconciles the (current) FY19 Revised Capital Budget against the (original) Final FY19 Capital Budget adopted on June 22, 2018.

This revision impacts multiple projects.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The original FY19 Capital Budget adopted June 22, 2018 totals \$17,690,059.

- Revision 1 – November 16, 2018 – This revision added five (5) capital projects, added additional funding to four (4) existing projects and removed one (1) project. The Bus Replacement Fund section was moved and updated as well. This revision resulted in a net increase of \$4,282,818, for an FY19 Revised Capital Budget balance of \$21,972,877.

The Reconciliation by Project as of November 16, 2018 (Attachment C) lists the detail of all changes by project since adoption on June 22, 2018, and includes an explanation for the action. The year to date change is a net increase of \$4,282,818.

The estimated balance of the Operating and Capital Reserve Fund after this revision is approximately \$2M. Please note, the estimate provided here includes deductions for approved capital projects *and* commitments (the required local match) against grants that have *not* yet been awarded; those un-awarded projects are *not* included in the attached revised budget. If/when awarded, the capital budget will be revised accordingly.

V. ALTERNATIVES CONSIDERED

- There are no recommended alternatives at this time. If the revised budget is not approved, important capital improvements and capital projects may be delayed or cancelled.

VI. ATTACHMENTS

Attachment A: FY19 Capital Budget Resolution

Attachment B: FY19 Revised Capital Budget as of November 16, 2018

Attachment C: FY19 Revised Capital Budget – Reconciliation by Project as of November 16, 2018

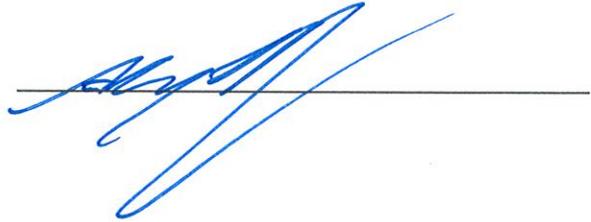
Prepared By: Debbie Kinslow, Finance Deputy Director

VII. APPROVALS:

Approved as to fiscal impact:
Angela Aitken, CFO



Alex Clifford, CEO/General Manager



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Attachment A

BEFORE THE BOARD OF DIRECTORS OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Resolution No. _____
On the Motion of Director _____
Duly Seconded by Director _____
The following Resolution is adopted:

A RESOLUTION OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT AUTHORIZING A REVISION TO THE FY19 CAPITAL BUDGET

WHEREAS, the Board of Directors approved the FY19 Capital Budget on June 22, 2018 with a total budget of \$17,690,059; and

WHEREAS, it is necessary to revise the adopted FY19 Capital Budget by \$4,282,818 to add funds for various capital projects;

NOW, THEREFORE, BE IT RESOLVED, that the Board of Directors of the Santa Cruz Metropolitan Transit District hereby amends the FY19 Capital Budget per Attachment B to this resolution for a total FY19 Revised Capital Budget of \$21,972,877.

PASSED AND ADOPTED this 16th day of November 2018, by the following vote:

AYES: Directors -

NOES: Directors -

ABSENT: Directors -

ABSTAIN: Directors -

Approved _____
BRUCE MCPHERSON
Board Chair

ATTEST _____
ALEX CLIFFORD,
CEO, General Manager

APPROVED AS TO FORM:

JULIE A. SHERMAN
General Counsel

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SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
 FY19 (REVISED) CAPITAL BUDGET
 AS OF NOVEMBER 16, 2018

PROJECT/ACTIVITY	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	LCTOP	LPP	BUS REPLACEMENT FUND		TOTAL
								STA-SB1 (XFR FROM OPER BUDGET)	MEASURE D (XFR FROM OPER BUDGET)	
	FEDERAL FUNDS	PTMISEA (1B) + INT-PAC STATION/JKS/B US & BUS FAC.	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	STA-SB1 (XFR FROM OPER BUDGET)	MEASURE D (XFR FROM OPER BUDGET)	
Construction Related Projects										
1 Pacific Station/Metro Center-Station Rehabilitation		\$ 1,551,333								\$ 1,551,333
Pacific Station/Metro Center-Roof & Window Replacement		\$ 350,000								\$ 350,000
Pacific Station/Metro Center-Conceptual Design / MOU		\$ 175,668								\$ 175,668
2 Metrobase Project - Judy K.Souza - Operations Bldg.	\$ 140,535	\$ 345,000						\$ 35,134	\$ 89,000	\$ 434,000
Mechanical Platform Upgrade - JKS			\$ 120,000							\$ 120,000
3 Transit Security Projects:										
Emergency Generators - Equip.			\$ 318,300							\$ 318,300
Cameras on Buses			\$ 42,275							\$ 42,275
Security Cameras Consultant			\$ 25,000							\$ 25,000
Emergency Generators - Consultant			\$ 16,000							\$ 16,000
Security Cameras Install			\$ 2,275							\$ 2,275
Subtotal	\$ 140,535	\$ 2,246,333	\$ 523,850					\$ 35,134	\$ 89,000	\$ 3,034,851
IT Projects										
4 None										
Subtotal										
Facilities Upgrades & Improvements										
5 Fuel Management System (FTA 5339a FY17)	\$ 180,000									\$ 180,000
6 Gate Control at JKS Bus Entry (FTA 5339a FY18)	\$ 100,000									\$ 100,000
7 138 Golf Club Fire Egress (FTA 5339a FY17)	\$ 97,523									\$ 97,523
8 Roof Repairs-Maint. Facility (FTA 5339a FY18)	\$ 92,000									\$ 92,000
9 Paint Exterior-Maint. Facility (FTA 5339a FY18)	\$ 60,000									\$ 60,000
10 Facilities Improvements (FTA 5339a FY18)	\$ 56,725							\$ 1,275		\$ 58,000
11a Facilities Improvements (FTA 5339a FY15/16)	\$ 34,174									\$ 34,174
11b Landscaping WTC (FTA 5339a FY15/16)	\$ 30,000									\$ 30,000
12 Bus Stop & Pac. Improve. (FTA 5339a FY15/16)	\$ 29,082									\$ 29,082
13 Bus Shelter Reconditioning (FTA 5339a FY16)	\$ 25,000									\$ 25,000
14 Awning @ Fueling Station A&E only (FTA 5339a FY18)	\$ 25,000									\$ 25,000
15 Admin Bldg. Engineering & Renovations	\$ 14,000									\$ 14,000
16 Asphalt Repair-Pac Station Layover (FTA 5339a FY18)	\$ 10,000									\$ 10,000
17 Admin Bldg. Engineering & Renovations (FTA 5339a FY18)	\$ 10,000									\$ 10,000
18 Concrete Surface Repair - Bus Yard (FTA 5339a FY18)	\$ 7,638									\$ 7,638
19 Relocate Mechanics Sink-Golf Club (FTA 5339a FY14)	\$ 7,000							\$ 1,910		\$ 8,910
20 Fencing Behind Diesel Tank (FTA 5339a FY18)	\$ 6,400							\$ 1,910		\$ 8,310
21 Upgrade Exhaust Evac. Golf Club (FTA 5339a FY14)	\$ 784,542							\$ 6,895		\$ 791,437
Subtotal	\$ 3,732,074	\$ 561,332								\$ 4,293,406
Revenue Vehicle Purchases, Replacements & Campaigns										
22 Electric Bus (3) + Infra & Proj Mgmt. (FTA 5339c FY16)	\$ 3,732,074	\$ 561,332								\$ 4,293,406
23 4'40" CNG Replacements (FTA 5339b FY17)	\$ 1,206,518									\$ 1,206,518
24 FY18 STIP - 2 ZEBs (STIP, LPP, HWIP = \$300K)								\$ 671,079	\$ 626,136	\$ 1,297,215
25 FY18 STIP - AVL/ITS (STIP, Meas D)							\$ 786,000		\$ 757,951	\$ 1,543,951
26 Electric Bus (1) - Watsonville Circulator DAC (FY15/16 LCTOP)										
27 FY18 STIP - Relurb 3 Buses @ \$345K (STIP, Measure D)			\$ 870,000							\$ 870,000
VTA Bus Transfer - Decommission & Retrofit 10 Electric			\$ 1,400,000							\$ 1,400,000
Hybrids, and 4 Diesel Anics										
28 Paracruz Van Replacements (11) (FTA 5339a FY15/16)	\$ 816,000									\$ 816,000
29 Electric Bus (1) - Watsonville Circulator DAC (FY17/18 LCTOP)										
30 CNG Bus (1) - (STBG FY17 via SCCRIC)	\$ 500,000	\$ 70,000								\$ 570,000
CNG Bus (1) - (Calltrans FT13 FY17 5339 Starcwide										
31 Discretionary										
Year 2 - Capitalized Lease - (3 Now Flyer Buses) -	\$ 456,957									\$ 456,957
32 Measure D										
33 Mid-Life Bus Engine Overhaul (7) (FTA 5339a FY14)	\$ 132,191									\$ 132,191
34 Mid-Life Bus Engine Overhaul (4) (FTA 5339a FY17)	\$ 160,000									\$ 160,000
35										

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
FY19 (REVISED) CAPITAL BUDGET
AS OF NOVEMBER 16, 2018**

PROJECT/ACTIVITY	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	LCTOP	LPP	STA-SBT (XFR FROM OPER BUDGET)	BUS REPLACEMENT FUND		TOTAL
									PTMISEA (1B) + INT-PAC STATION/JKS/IB US & BUS FAC.	CAL-OES PROP 1B - TRANSIT SECURITY	
36 Bus Repair Campaign (36) (FTA 5339a FY14)	\$ 82,247								\$ 20,562		\$ 102,809
37 Capitalized Vehicle - (1) (FTA 5310 FY13/14)	\$ 63,000								\$ 5,367		\$ 68,367
38 Announcment System Programming Patch (Clever Devices) (Measure D)										\$ 28,500	\$ 28,500
39 Bus Repairs (3) was Repair Roof at Pacific Station (FTA 5339a FY13)	\$ 11,042								\$ 2,760		\$ 13,802
Subtotal	\$ 7,160,029	\$ 988,548	\$ 3,170,000	\$ 1,572,394	\$ 786,000	\$ 671,079	\$ 3,393,893	\$	\$	\$	\$ 17,741,944
Non-Revenue Vehicle Purchases & Replacements											
40 Propane Fueled Tow Motor (FTA 5339a FY14)	\$ 46,602							\$ 11,651		\$	\$ 60,000
41 Replac Custodial Support Vehicles (2) (FTA5339a FY18)	\$ 30,000									\$ 1,747	\$ 30,000
Subtotal	\$ 76,602	\$	\$	\$	\$	\$	\$	\$ 11,651	\$	\$ 1,747	\$ 90,000
Fleet & Maint Equipment											
42 Bus Yard Scrubber/Sweeper (FTA 5339a FY18)	\$ 75,000										\$ 75,000
43 Floor Scrubbers for Maint. Shop (FTA 5339a FY18)	\$ 45,000										\$ 45,000
Subtotal	\$ 120,000	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$ 120,000
Office Equipment											
44 Business Copy Machine-Admin (FTA 5339a FY18)	\$ 20,000										\$ 20,000
45 4 Vertical Filing File Cabinets-Admin	\$ 20,000									\$ 9,200	\$ 29,200
Subtotal	\$ 20,000	\$	\$	\$	\$	\$	\$	\$	\$	\$ 9,200	\$ 29,200
Misc.											
46 T/M Pin Pad Bezel 8 Upgrade (6)	\$ 19,000									\$ 70,000	\$ 70,000
47 CIS Call Center Furnishings (FTA 5339a FY18)								\$ 17,045		\$ 15,000	\$ 32,045
48 Ticket Vending Machine-SLV-Installation Ccstis + Misc										\$ 10,000	\$ 10,000
49 Misc. Emergency Capital Items \$1K to \$5K	\$ 8,000									\$ 8,000	\$ 8,000
50 Paracruz MDC Replacements (FTA 5339a FY18)										\$ 6,600	\$ 6,600
51 Watsonville Transit Mural-(\$2,700 from Arts Council (SC))	\$ 27,000							\$ 17,045		\$ 101,600	\$ 145,645
Subtotal	\$ 27,000	\$	\$	\$	\$	\$	\$	\$ 17,045	\$	\$ 101,600	\$ 145,645
TOTAL CAPITAL PROJECTS	\$ 8,328,708	\$ 3,234,881	\$ 523,850	\$ 3,170,000	\$ 1,572,394	\$ 786,000	\$ 70,525	\$ 671,079	\$ 3,393,893	\$ 221,547	\$ 21,972,877

Attachment B

9-09B.2

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
 FY19 (REVISED) CAPITAL BUDGET
 AS OF NOVEMBER 16, 2018

PROJECT/ACTIVITY	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	LCTOP	LPP	BUS REPLACEMENT FUND		TOTAL
								PTMISEA (1B) + INT-PAC STATION/KS/IB US & BUS FAC.	CAL-OES PROP 1B - TRANSIT SECURITY	
FEDERAL FUNDS										
RESTRICTED										
	\$ 7,765,708									\$ 7,765,708
	\$ 563,000									\$ 563,000
State Sources of Funds:										
PTMISEA (1B)	\$ 3,234,881									\$ 3,234,881
Cal-OES Prop 1B Transit Security Grant Funds (CTSGP)		\$ 523,850								\$ 523,850
State Transportation Improvement Program (STIP)			\$ 3,170,000							\$ 3,170,000
Low Carbon Transit Operations Program (LCTOP)				\$ 1,572,394						\$ 1,572,394
Local Partnership Program (LPP)						\$ 786,000				\$ 786,000
Transfers from Operating Budget (STA-SB1)							\$ 70,525			\$ 70,525
Transfers from Operating Budget (STA-SGR (SB1))								\$ 671,079		\$ 671,079
Transfers from Operating Budget (Measure D)									\$ 3,393,893	\$ 3,393,893
Local Sources of Funds:										
Operating and Capital Reserve Fund									\$ 221,547	\$ 221,547
TOTAL CAPITAL FUNDING BY FUNDING SOURCE	\$ 8,328,708	\$ 3,234,881	\$ 523,850	\$ 3,170,000	\$ 1,572,394	\$ 786,000	\$ 70,525	\$ 671,079	\$ 3,393,893	\$ 21,972,877
Restricted Funds	\$ 8,328,708	\$ 3,234,881	\$ 523,850	\$ 3,170,000	\$ 1,572,394	\$ 786,000	\$ 70,525	\$ 671,079	\$ 3,393,893	\$ 21,680,805
Unrestricted Funds										\$ 292,072
TOTAL CAPITAL FUNDING	\$ 8,328,708	\$ 3,234,881	\$ 523,850	\$ 3,170,000	\$ 1,572,394	\$ 786,000	\$ 70,525	\$ 671,079	\$ 3,393,893	\$ 21,972,877
MEMO: BUS REPLACEMENT FUND - PRIOR YEAR CARRYOVER AND CURRENT YEAR FUNDING:										
Bus Replacement Fund - \$3M per Year										
FY18 Budgeted STA-SGR (Est. Carryover)								\$ 671,079		\$ 671,079
FY18 Budgeted STA-SB1 (Est. Carryover Amount)							\$ 233,003		\$ 559,099	\$ 233,003
FY18 Measure D (Est. Carryover)									\$ 559,099	\$ 559,099
FY19 STA-SGR Estimated Allocation								\$ 671,079		\$ 671,079
FY19 STA-SB1-Budgeted Transfer from Operating							\$ 468,773		\$ 1,860,148	\$ 468,773
FY19 Measure D-Budgeted Transfer from Operating							\$ 701,776	\$ 1,342,158	\$ 2,419,247	\$ 1,860,148
Subtotal										\$ 4,463,181

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Attachment C
FY19 CAPITAL BUDGET
RECONCILIATION BY PROJECT
AS OF NOVEMBER 16, 2018-1ST REVISION

FY19 FINAL CAPITAL BUDGET ADOPTED JUNE 22, 2018: \$ 17,690,059

CAPITAL PROJECT	SOURCE	AMOUNT	TOTAL
Add Funding: Electric Bus (3) + Infrastructure & Proj Mgmt	MEASURE D	\$ 75,000	
Reason: Add funds for BUILD application			
Add: 4 40' CNG Replacements	FTA 5339(b) FY17	\$ 1,206,518	
	STA-SGR	\$ 671,079	
	MEASURE D	\$ 757,951	
Reason: Add project - grant awarded			
Add: 2 Zero-Emission Buses (ZEBs)	STIP (FY18)	\$ 870,000	
	LPP	\$ 786,000	
Reason: Add project - grant awarded			
Add: AVL/ITS	STIP (FY18)	\$ 1,400,000	
	MEASURE D	\$ 181,385	
Reason: Add project - grant awarded			
Add: Refurbish 3 Buses @ \$345K @	STIP (FY18)	\$ 900,000	
	MEASURE D	\$ 116,605	
Reason: Add project - grant awarded			
Add Funds: CNG Bus (1) - (STBG FY17)	MEASURE D	\$ 88,887	
Reason: Funding needed to backfill the difference between the cost of the bus and the amount of the grant award			
Add Funds: CNG Bus (1) - Caltrans FY13-FY17 5339 Statewide	MEASURE D	\$ 121,293	
Reason: Rename project from: CNG Bus (1) - (FTA 5339 Rural FY16) and add funding needed to backfill the difference between the cost of the bus and the amount of the grant award			

Attachment C
BUDGET
RECONCILIATION BY PROJECT
AS OF NOVEMBER 16, 2018-1ST REVISION

CAPITAL PROJECT	SOURCE	AMOUNT	TOTAL
Add: 4 Vertical Fire King File Cabinets-Admin	RESERVES	\$ 9,200	
Reason: Add funds to purchase file cabinets needed for Admin confidential files			
Remove Project: Business Copy Machine - Operations	RESERVES	\$ (9,000)	
Reason: Project completed at the end of FY18			
Add: Electric Bus (1) Watsonville Circulator DAC (FY17/18 LCTOP)	LCTOP	\$ 863,102	
Reason: Add project - grant awarded			
Add: VTA Bus Transfer - Decommission & Retrofit 10 Electric Hybrids, and 4 Diesel Artics	MEASURE D (BRF)	\$ 1,000,000	
Reason: Add project per BOD SR 10/26/18			
Move: Bus Replacement Fund (detail)	STA-SB1	\$ (993,797)	
	STA-SGR	\$ (1,342,158)	
	MEASURE D	\$ (2,419,247)	
Reason: Move Bus Replacement Fund detail to a separate section on the report and update the amount carried forward to FY19			

FUNDING SUMMARY:			
	Cal-OES	\$	-
	CASH RESERVES	\$	200
	FTA	\$	1,206,518
	LCTOP	\$	863,102
	LPP	\$	786,000
	MEASURE D	\$	(78,126)
	PTMISEA	\$	-
	STA	\$	(993,797)
	STA-SGR	\$	(671,079)
	STBG	\$	-
	STIP	\$	3,170,000
TOTAL CAPITAL BUDGET REVISIONS THROUGH 11/16/18:			\$ 4,282,818

FY19 REVISED CAPITAL BUDGET AS OF NOVEMBER 16, 2018: **\$ 21,972,877**



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

NATHANAEL ABRIGO
PARATRANSIT OPERATOR

FOR THE COMPLETION OF 10 YEARS OF SERVICE
BETWEEN 2008 AND 2018

GIVEN THIS 16TH DAY OF NOVEMBER 2018

CHAIR, BOARD OF DIRECTORS

CEO/GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

TO

THOMAS HILTNER
GRANTS/LEGISLATIVE ANALYST

FOR THE COMPLETION OF 20 YEARS OF SERVICE
BETWEEN 1998 AND 2018

GIVEN THIS 16TH DAY OF NOVEMBER 2018

CHAIR, BOARD OF DIRECTORS

CEO/GENERAL MANAGER

10.2



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

TO

ANDREW KEARNEY
PARATRANSIT OPERATOR

**FOR THE COMPLETION OF 10 YEARS OF SERVICE
BETWEEN 2008 AND 2018**

GIVEN THIS 16TH DAY OF NOVEMBER 2018

CHAIR, BOARD OF DIRECTORS

CEO / GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

TO

ROBERT KRAUSE
PARATRANSIT OPERATOR

FOR THE COMPLETION OF 10 YEARS OF SERVICE
BETWEEN 2008 AND 2018

GIVEN THIS 16TH DAY OF NOVEMBER 2018


CHAIR, BOARD OF DIRECTORS


CEO/GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

TO

RUBEN VALDEZ
PARATRANSIT OPERATOR

**FOR THE COMPLETION OF 10 YEARS OF SERVICE
BETWEEN 2008 AND 2018**

GIVEN THIS 16TH DAY OF NOVEMBER 2018

CHAIR, BOARD OF DIRECTORS

CEO/GENERAL MANAGER

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VERBAL PRESENTATION ONLY

CEO UPDATE

Alex Clifford

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DATE: November 16, 2018
TO: Board of Directors
FROM: Angela Aitken, Chief Financial Officer
**SUBJECT: ACCEPT AND FILE THE YEAR TO DATE MONTHLY FINANCIAL
REPORT AS OF AUGUST 31, 2018**

I. RECOMMENDED ACTION

**That the Board of Directors accept and file the Year to Date Monthly
Financial Report as of August 31, 2018**

II. SUMMARY OF ISSUES

- An analysis of Santa Cruz Metropolitan Transit District's (METRO) financial status is prepared monthly in order to inform the Board of Directors regarding METRO's actual revenues and expenses in relation to the adopted operating and capital budgets for the fiscal year.
- This staff report is the web-accessible companion document to the attached PowerPoint presentation titled "Year to Date Monthly Financial Report as of August 31, 2018."
- Staff recommends that the Board of Directors accept and file the attached report.

III. DISCUSSION/BACKGROUND

Below are the written explanations of the various charts and graphs in the attached Year to Date Monthly Financial Report as of August 31, 2018. The fiscal year has elapsed 17%.

Slide 1

(Cover) Year to Date Monthly Financial Report as of August 31, 2018

Slide 2

FY19 Operating Revenue and Expenses for the Month Ending August 31, 2018

- Operating Revenues for the month are unfavorable by \$193K
- Operating Expenses
 - Labor Regular - favorable by \$127K
 - Labor OT - unfavorable by \$85K
 - Fringe Benefits – favorable by \$69K
 - Non-Personnel - favorable by \$98K

- Total Operating Expenses – favorable by \$209K
- Operating Balance – favorable by \$59K

Slide 3

FY19 Operating Revenue and Expenses Year to Date as of August 31, 2018

- Operating Revenues Year to Date are favorable by \$584K
- Operating Expenses
 - Labor Regular - favorable by \$334K
 - Labor OT - unfavorable by \$164K
 - Fringe Benefits - favorable by \$167K
 - Non-Personnel - favorable by \$190K
- Total Operating Expenses – favorable by \$527K
- Transfers – unfavorable by \$19K
- Operating Balance – favorable by \$1,129K

Slide 4

FY19 Operating Revenue by Major Funding Source - Year to Date as of August 31, 2018

- Passenger Fares- actual is \$1,811K while budget is \$1,742K
- Sales Tax Revenue (including Measure D)- actual is \$4,038K while budget is \$3,566K
- Other Revenue- actual is \$131K while budget is \$89K
- Federal Op Assistance – actual is \$134 while budget is \$0.

Slide 5

Favorable/ (Unfavorable) Revenue Variance to Budget Year to Date as of August 31, 2018

- Passenger Fares variance to budget is favorable by \$70K primarily due to:
 - Highway 17 Fares over budget (monthly pass sales at the beginning of the fiscal year).
- Sales Tax Revenue variance to budget is favorable by \$472K as the California Department of Tax and Fee Administration (CDT FA) changed the way funds are disbursed, while the monthly budget allocations are based on last year's actual allocations.
- Other Revenue variance to budget is favorable by \$42K primarily due to Advertising and Interest income.

Slide 6

FY19 Operating Expenses by Major Expense Category Year to Date as of August 31, 2018

- Labor - Regular- actual is \$2,528K while budget is \$2,862K
- Labor – OT - actual is \$448K while budget is \$284K
- Fringe Benefits - actual is \$3,390K (*of which \$889K is the Retirement Expense YTD*) while budget is \$3,557K
- Services - actual is \$624K while budget is \$643K
- Mobile Materials & Supplies - actual is \$427K while budget is \$556K
- Other Expenses - actual is \$385K while budget is \$426K.

Slide 7

Favorable/ (Unfavorable) Expense Variance to Budget Year to Date as of August 31, 2018

- Labor – Regular variance to budget is favorable by \$334K due to:
 - Vacant funded positions
 - Extended unpaid leaves of absence
- Labor – OT variance to budget is unfavorable by \$164K due to vacant positions and extended leaves of absence in various departments.
- Fringe Benefits variance to budget is favorable by \$167K primarily due to lower medical and workers comp insurance costs.
- Services variance to budget is favorable by \$20K primarily due to Prof & Tech Fees under budget.
- Mobile Materials & Supplies variance to budget is favorable by \$128K due to Fuel/Lube Rev Veh and Rev Veh Parts.
- Other Expenses variance to budget is favorable by \$41K primarily due to Employee Training and credits for Repairs – District Property.

Slide 8

FY19 Transfers Year to Date as of August 31, 2018

- Transfer to Capital Budget (2016 Net Sales Tax Measure D)- actual is \$291K while budget is \$310K.
- Transfer to Capital Budget (2016 Net Sales Tax Measure D) variance to budget is unfavorable by \$19K.

Slide 9

FY19 Capital Budget Spending Year to Date (by Funding Source) as of August 31, 2018

- Total Capital Spending year to date is \$299K; FY18 budget is \$17.7M

- Cal-OES Prop 1B Transits Security Grant spending (CTSGP) is \$25K
- Operating and Capital Reserve spending is \$52K
- Federal Capital Grants (FTA) spending is \$70K
- Measure D spending is \$70K
- State Transit Assistance (STA –SB-1-FY18) spending is \$11K
- State – PTMISEA (1B) spending is \$70K.

Slide 10

FY19 Capital Budget Spending Year to Date as of August 31, 2018

- Total Capital Projects spending year to date is \$299K; FY18 budget is \$17.7M
- Construction Related Projects spending is \$94K for the following projects:
 - Metrobase Project – Judy K. Souza – Operations Bldg.
 - Transit Security Projects
- Revenue Vehicle Replacements spending is \$98K for the following projects:
 - Electric Bus (3), Infrastructure and Project Management (FTA 5339c FY16)
 - Paracruz Van Replacements (11) (FTA 5339a FY15/16)
 - Capitalized Lease (3 New Flyer Buses) – Year 2
 - Bus Repaint Campaigns (36) (FTA 5339a FY14)
 - Paratransit Vehicle (1) (FTA 5310 FY13/14)
 - Capitalized Lease – 3 New Flyer Buses – External Announcement System Programming Patch (Clever Devices)
- Non-Revenue Vehicle Replacements spending is \$55K for the following project:
 - Propane Fueled Tow Motor (FTA 5339a FY14)
- Misc. spending is \$52K for the following projects:
 - TVM Pin Pad Bezel 8 Upgrade (6)
 - Misc. Emergency Capital Items (\$1K to \$5K)

Slide 11

(Cover Sheet) - Additional Information

Slide 12

Additional Information for the Month of August 2018

- Unemployment Rate % in Santa Cruz County is 3.9%

- \$ Gasoline per Gallon for the San Francisco-Oakland-San Jose area is \$3.76
- Monthly Ridership - Without UCSC (Cabrillo, Highway 17 and Fixed Route) has increased in August 2018.

Slide 13

FY19 Operating Revenue, Expenses, and Transfers Year to Date as of October 31, 2018: Preliminary

- Revenue – favorable by \$1,623K
- Operating Expenses:
 - Personnel Expenses - favorable by \$710K
 - Non-Personnel - favorable by \$819K
- Total Operating Expenses - favorable by \$1,529K
- Transfers – favorable by \$150K
- Operating Balance – favorable by \$3,002K

IV. FINANCIAL CONSIDERATIONS/IMPACT

Favorable budget variances in Operating Revenues and Expenses contributed to the favorable budget variance in Operating Balance, Year to Date as of August 31, 2018.

V. ALTERNATIVES CONSIDERED

- There are no alternatives to consider, as this is an accept and file Year to Date Monthly Financial Report.

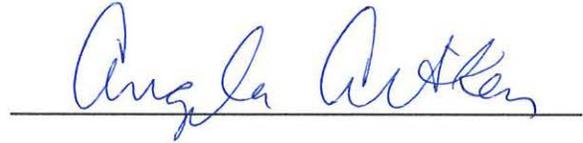
VI. ATTACHMENTS

- Attachment A:** Year to Date Monthly Financial Report as of August 31, 2018 Presentation
- Attachment B:** FY19 Capital Budget Project Status Report as of August 31, 2018

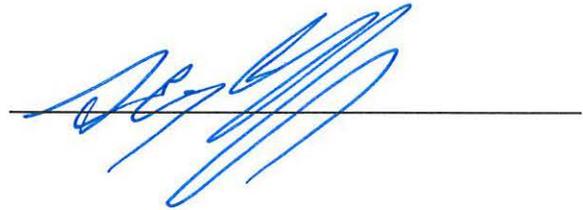
Prepared by: Kristina Mihaylova, Sr. Financial Analyst

VII. APPROVALS:

Approved as to fiscal impact:
Angela Aitken, Chief Financial Officer



Alex Clifford, CEO/General Manager





Year to Date Monthly Financial Report as of August 31, 2018

Santa Cruz METRO Board of Directors

November 16, 2018

Angela Aitken, Chief Financial Officer

FY19 Operating Revenue and Expenses For the Month Ending August 31, 2018

17% of Fiscal Year Elapsed

\$ In Thousands	Actual	Budget	Budget to Actual Favorable/ (Unfavorable)
Operating Revenue:	\$2,766	\$2,959	(\$193)
Operating Expenses:			
Labor - Regular	\$1,304	\$1,431	\$127
Labor - Overtime	\$227	\$142	(\$85)
Fringe Benefits	\$1,709	\$1,778	\$69
Non-Personnel Expenses	\$744	\$842	\$98
Total Operating Expenses:	\$3,984	\$4,193	\$209
Transfers:	(\$113)	(\$155)	(\$42)
Operating Balance:	(\$1,331)	(\$1,389)	\$59

12A.2



FY19 Operating Revenue and Expenses

Year to Date as of August 31, 2018

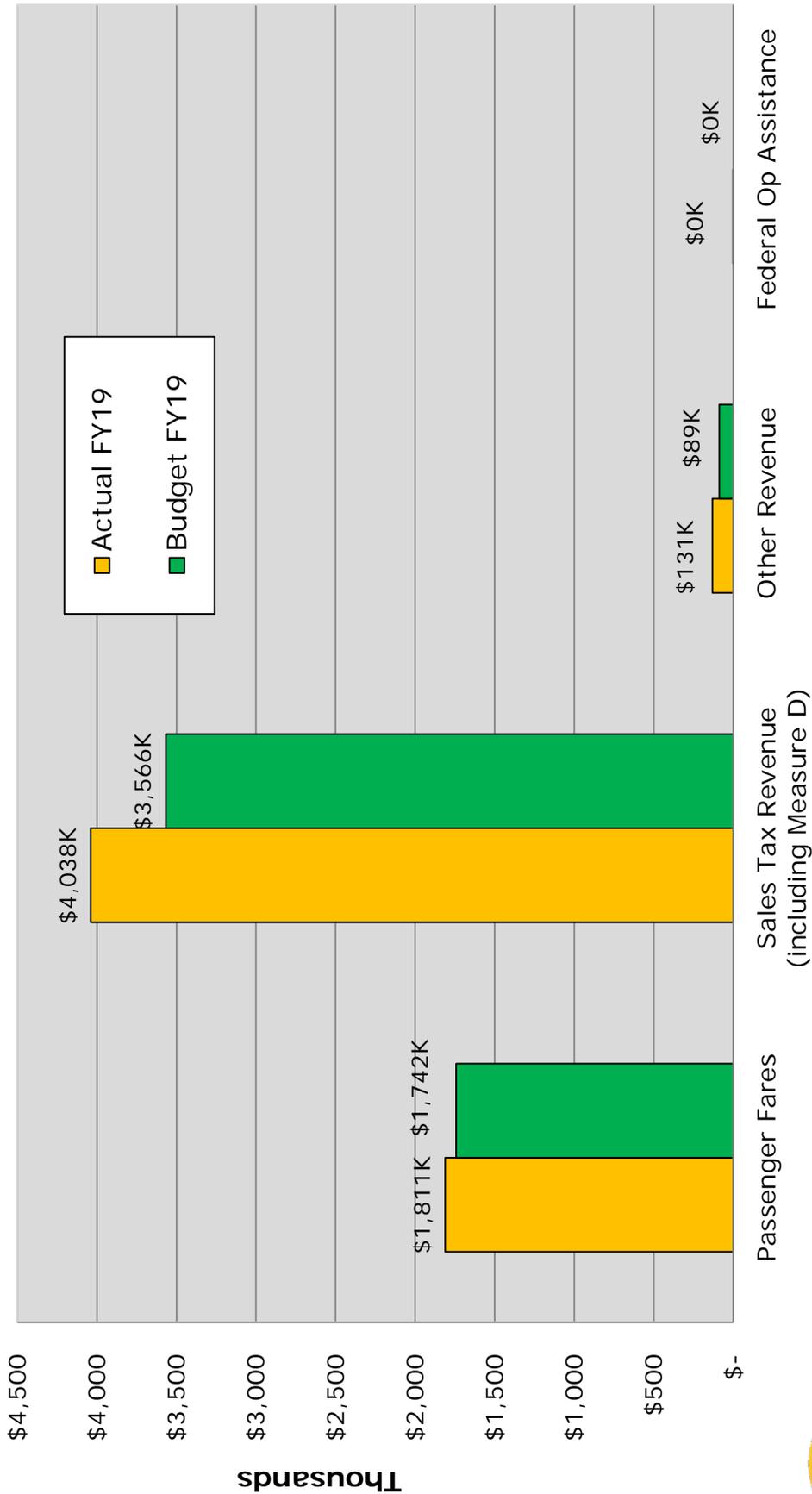
17% of Fiscal Year Elapsed

\$ In Thousands	Actual	Budget	Budget to Actual Favorable/ (Unfavorable)
Operating Revenue:	\$5,981	\$5,397	\$584
Operating Expenses:			
Labor - Regular	\$2,528	\$2,862	\$334
Labor - Overtime	\$448	\$284	(\$164)
Fringe Benefits	\$3,390	\$3,557	\$167
Non-Personnel Expenses	\$1,435	\$1,625	\$190
Total Operating Expenses:	\$7,801	\$8,328	\$527
Transfers:	(\$291)	(\$310)	(\$19)
Operating Balance:	(\$2,112)	(\$3,241)	\$1,129

12A.3



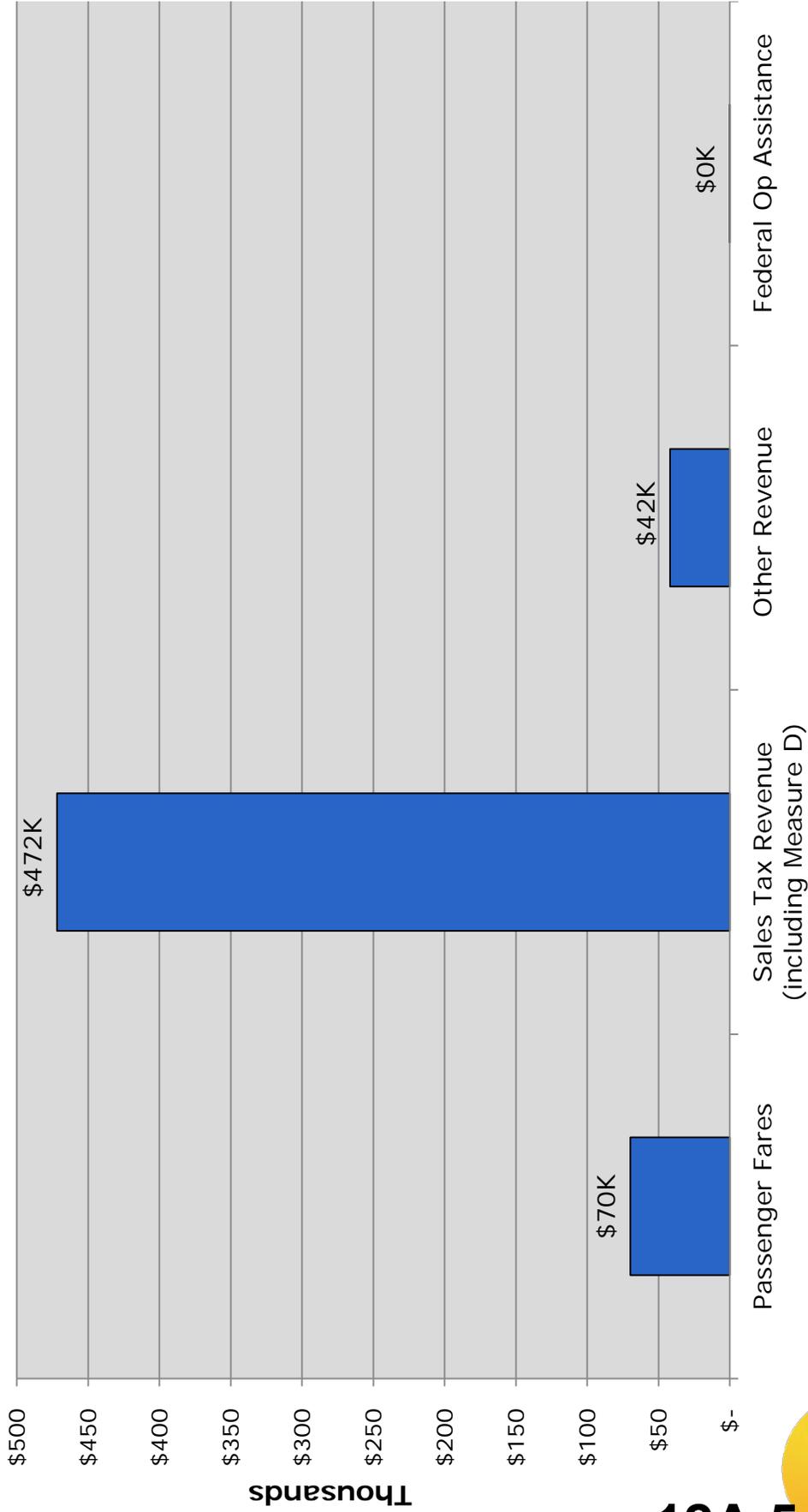
FY19 Operating Revenue by Major Funding Source
Year to Date as of August 31, 2018
 17% of Fiscal Year Elapsed



12A.4



Favorable/(Unfavorable) Revenue Variance to Budget
Year to Date as of August 31, 2018
17% of Fiscal Year Elapsed

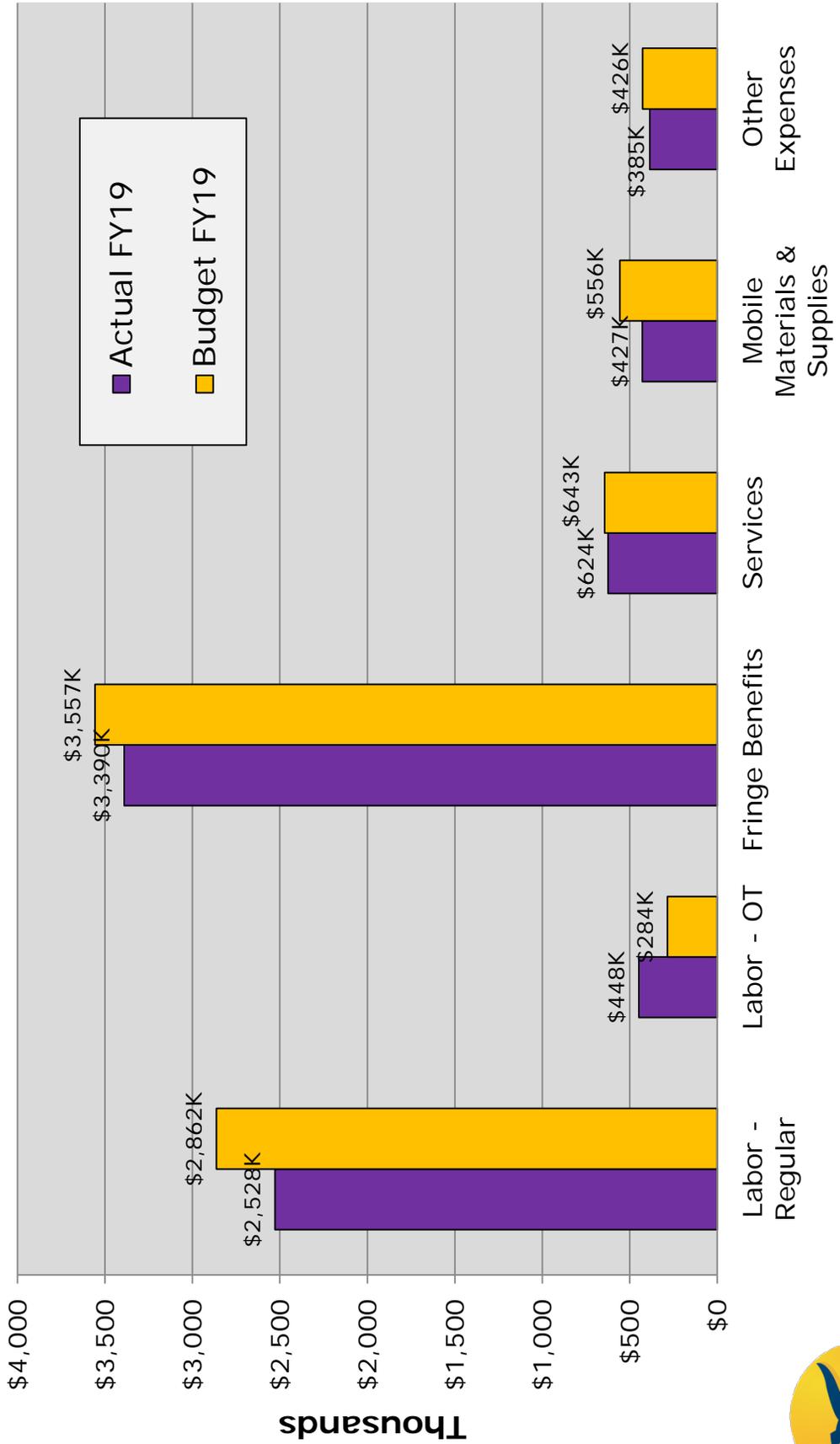


12A.5



FY19 Operating Expenses by Major Expense Category
Year to Date as of August 31, 2018

17% of Fiscal Year Elapsed

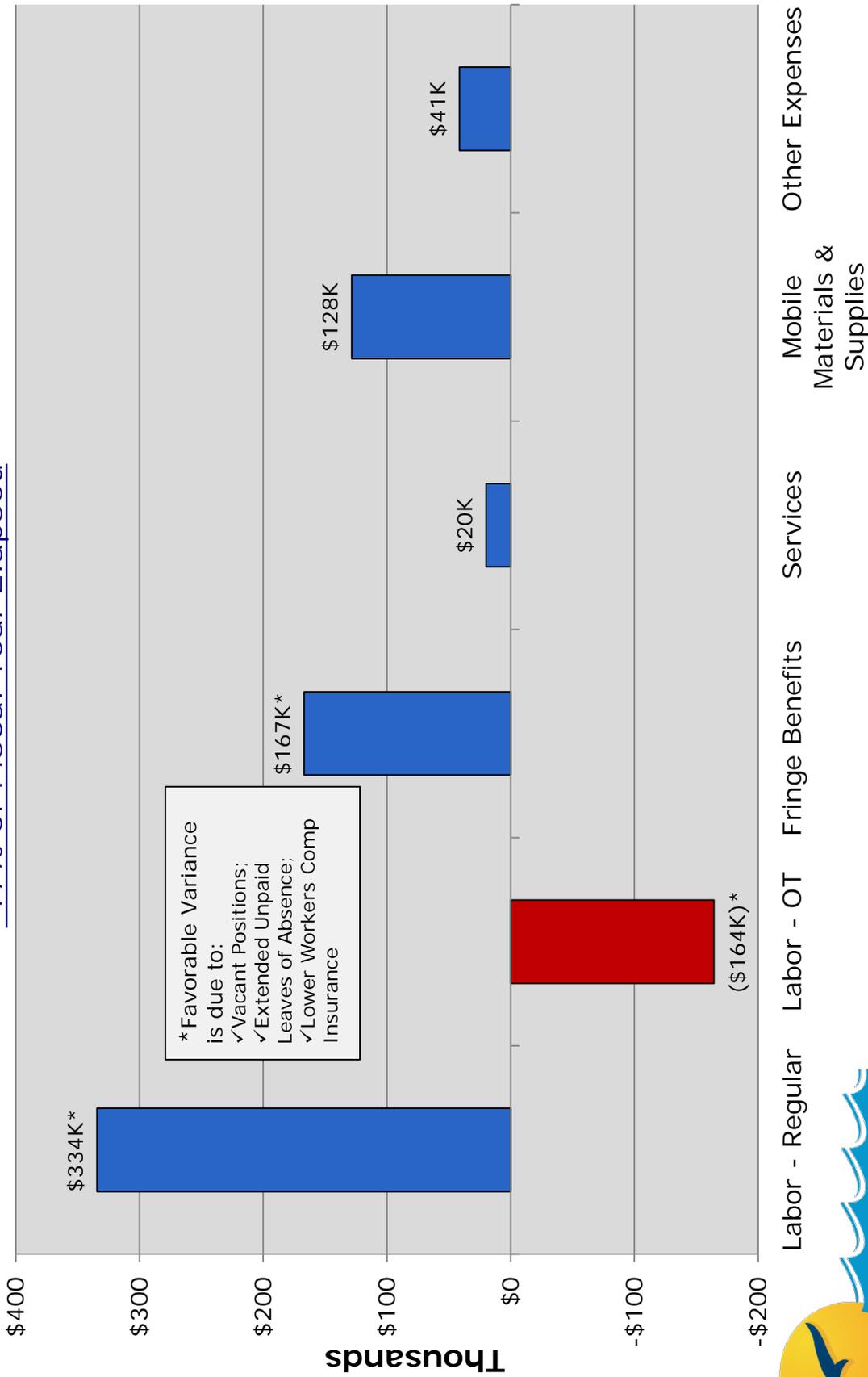


12A.6

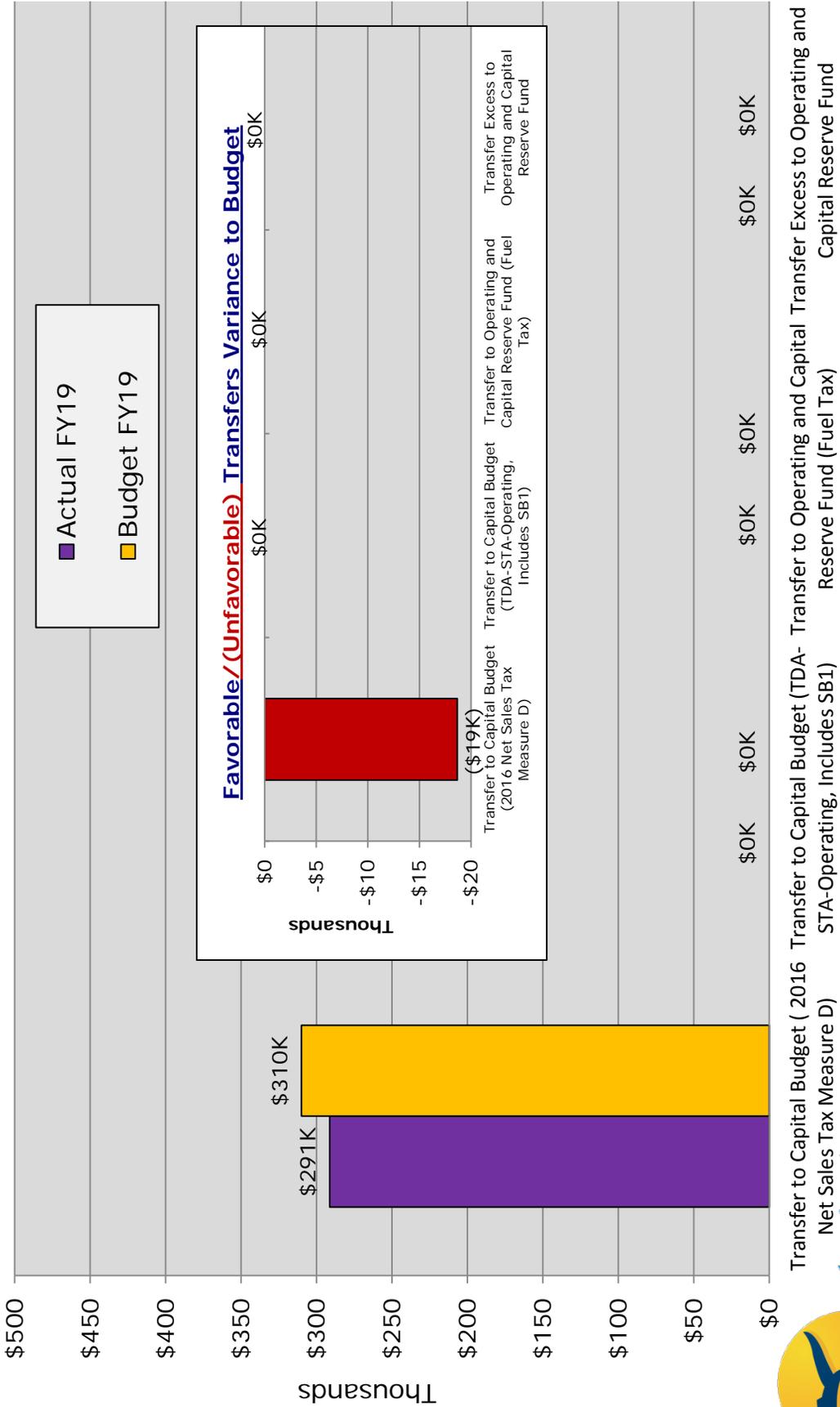


Favorable/(Unfavorable) Expense Variance to Budget
Year to Date as of August 31, 2018

17% of Fiscal Year Elapsed



FY19 Transfers
Year to Date as of August 31, 2018
17% of Fiscal Year Elapsed

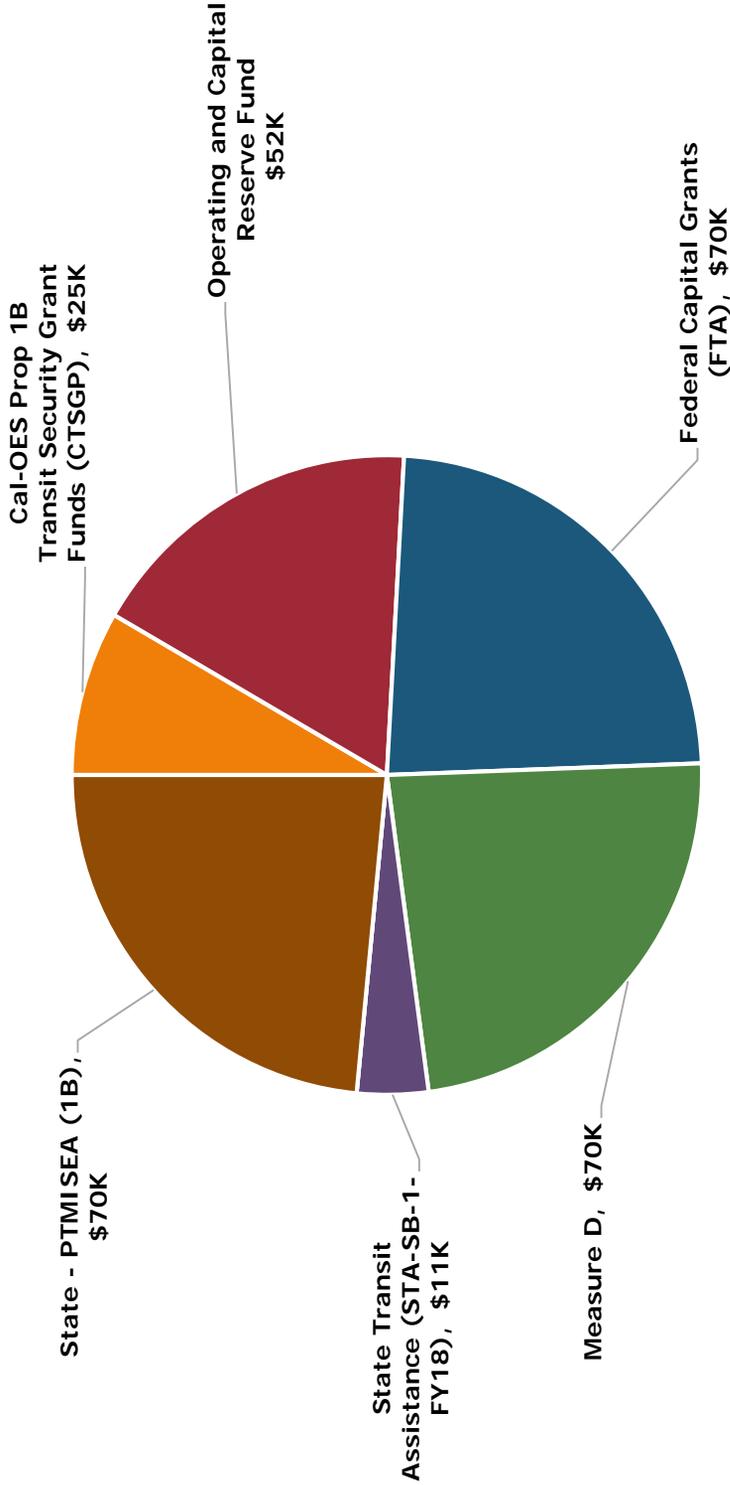


FY19 Capital Budget:

Spending Year to Date (by Funding Source) as of August 31, 2018

17% of Fiscal Year Elapsed

	Actual YTD	Total FY19 Budget	% Spent YTD
Total Capital Funding:	\$299,069	\$17,690,059	2%



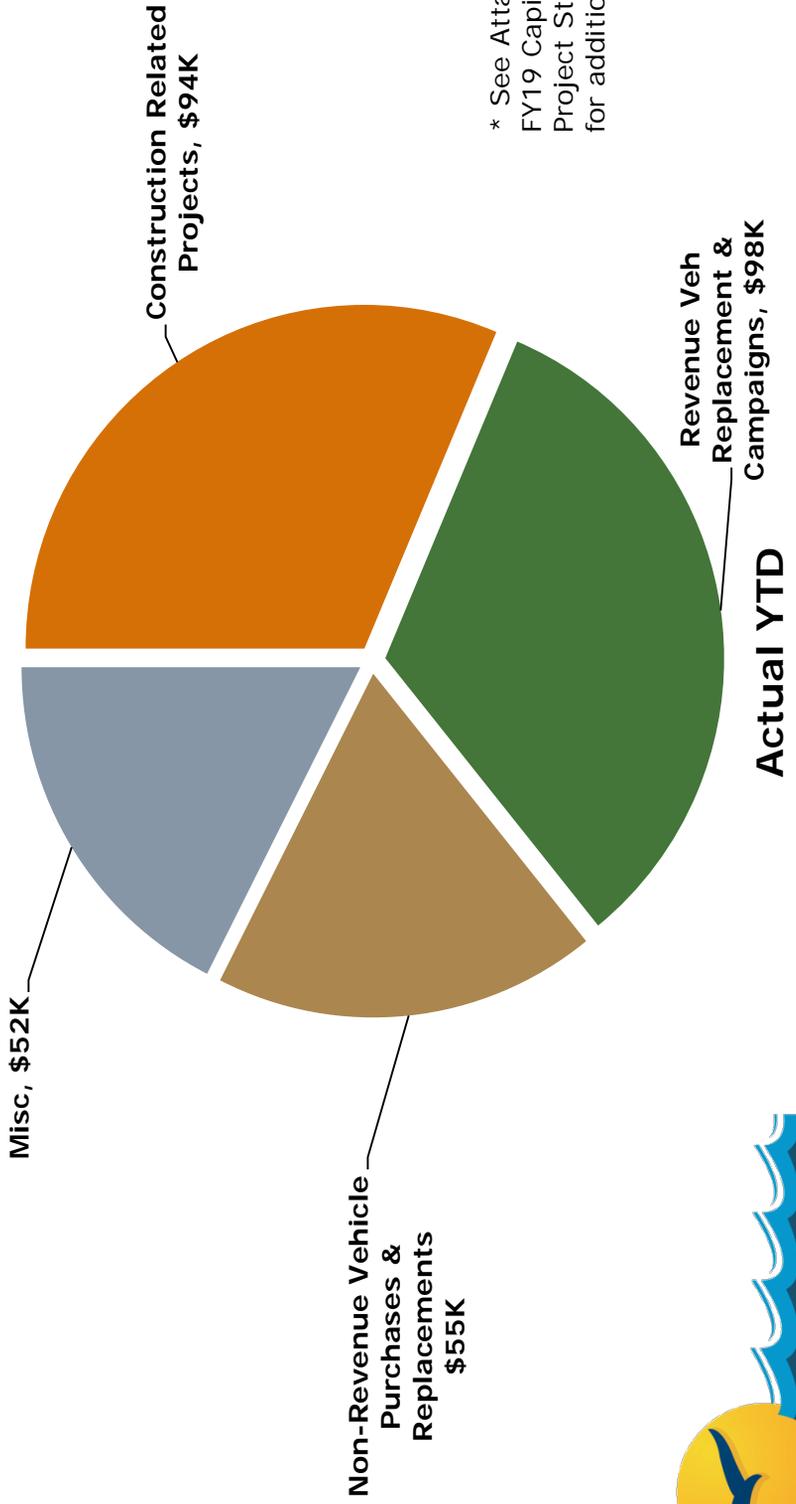
Actual YTD

FY19 Capital Budget:

Spending Year to Date as of August 31, 2018

17% of Fiscal Year Elapsed

	Actual YTD	Total FY18 Budget	% Spent YTD
Total Capital Projects:	\$299,069	\$17,690,059	2%



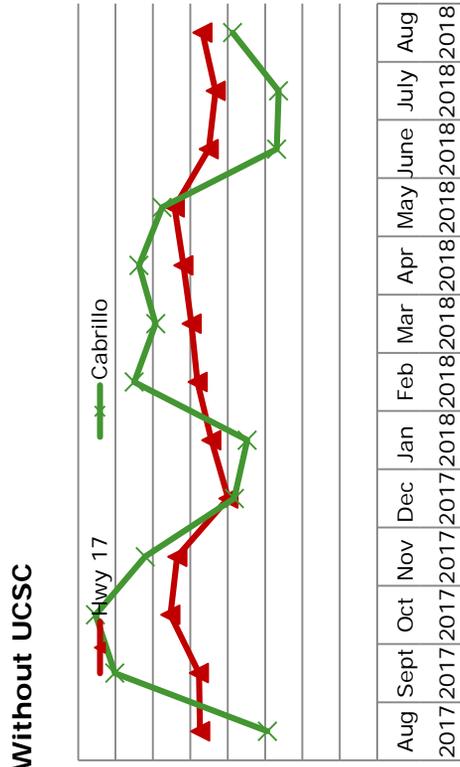
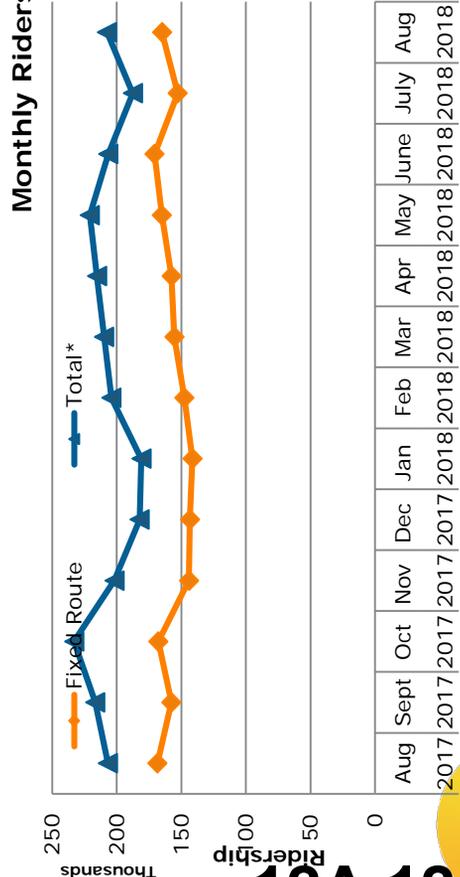
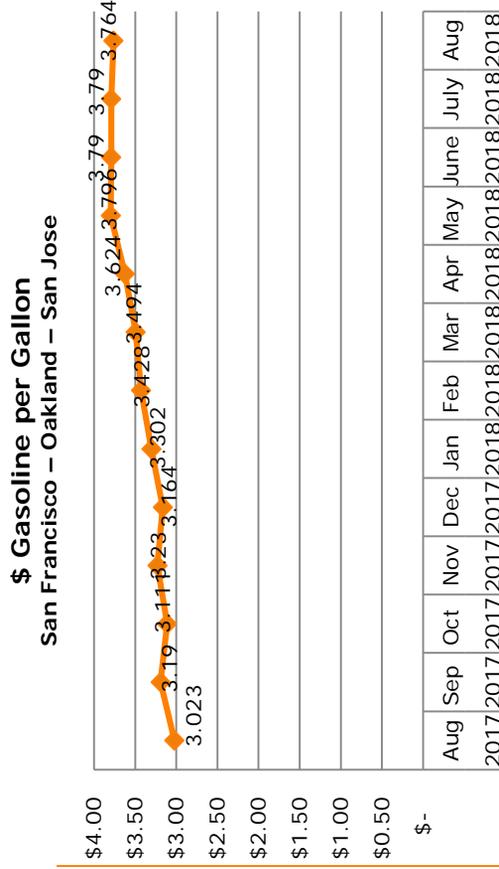
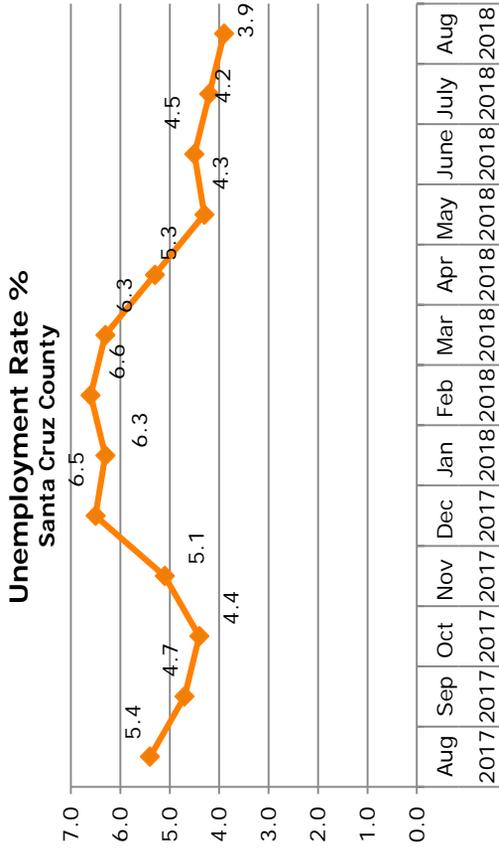
* See Attachment B – FY19 Capital Budget Project Status Report for additional details

Additional Information

12A.11



Additional Information



* Total = Fixed Route + Hwy 17 + Cabrillo Ridership



**FY19 Operating Revenue, Expenses, and Transfers:
Year to Date as of October 31, 2018: PRELIMINARY**

33% of Fiscal Year Elapsed

\$ In Thousands	Actual	Budget	Budget to Actual Favorable/ (Unfavorable)
Revenue:	\$14,903	\$13,280	\$1,623
Operating Expenses:			
Personnel Expenses	\$12,697	\$13,407	\$710
Non-Personnel Expenses	\$2,372	\$3,191	\$819
Total Operating Expenses:	\$15,069	\$16,598	\$1,529
Transfers:			
Transfers to Capital Budget	\$770	\$620	\$150
Transfers to Operating and Capital Reserve Fund	\$0	\$0	\$0
Total Transfers:	\$770	\$620	\$150
Operating Balance:	(\$936)	(\$3,938)	\$3,002

Questions

12A.14



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VERBAL PRESENTATION ONLY

UPDATE ON IMPLICATIONS OF PROP 6
ELECTION RESULTS

Barrow Emerson

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DATE: November 16, 2018
TO: Board of Directors
FROM: Barrow Emerson, Planning & Development Director
SUBJECT: REPORT ON UCSC ARTICULATED BUS PILOT PROJECT

I. RECOMMENDED ACTION

That the Board of Directors receive a presentation on the UCSC Articulated Bus pilot project and approve the continued operation of articulated bus service on fixed routes serving UCSC on a permanent basis

II. SUMMARY

- Over the years, Santa Cruz Metropolitan Transit District (METRO) fixed route bus services to UCSC have often suffered from overcrowding, leading to stranding passengers and pass-bys due to lack of capacity.
- METRO is not in a position to provide significant additional trips to address demand due to having a limited number of buses available.
- In August of 2017, the Board directed staff to implement an articulated bus pilot project on fixed routes serving UCSC using three buses for the winter and spring quarters of the 2017-18 school year to address capacity constraints.
- In August of 2018, the Board approved continuing to fund the operation of these three articulated buses for the 2018-19 school year (fall, winter, and spring quarters), authorized the METRO CEO to execute a second three-bus lease with Shuttle Bus Leasing (SBL), and authorized the CEO to execute a second annual agreement for UCSC to fund all related operating costs of the articulated bus pilot project.
- The three articulated buses operating on fixed routes serving UCSC are effectively addressing bus overcrowding and the pass-by of students waiting at bus stops by increasing bus capacity during peak service periods.
- It is requested that the Board accept this report on the articulated bus pilot project and approve the METRO strategy to continue to provide articulated bus service on UCSC routes on a permanent basis.

III. DISCUSSION/BACKGROUND

Over the years, METRO fixed route bus services to UCSC have often suffered from overcrowding, leading to stranding passengers and pass-bys due to lack of capacity. Historically METRO had been able to add service to meet this demand via morning trippers.

Even if UCSC were able to fund additional operators, due to a lack of additional vehicles to provide the services in the short-term, METRO is not in a position to provide enough additional trips to address the capacity issue.

In service planning for the 2017-18 school year, METRO and UCSC identified articulated buses as a possible tool to address overcrowding and the pass-by of students waiting at bus stops.

At its August 4, 2017 meeting, the Board authorized METRO staff to implement an articulated bus pilot project with UCSC for the winter and spring quarters of the 2017-18 school year. At its September 22, 2017 meeting, the Board authorized the CEO to execute an agreement with SBL to lease articulated buses for the fixed routes serving UCSC. Lastly, at its October 27, 2017 meeting, the Board authorized the CEO to execute an agreement with UCSC to fund all related costs to the pilot project, including vehicle leasing, operator training, and special vehicle pay.

At its August 24, 2018 meeting, the Board directed METRO staff to continue the articulated bus pilot project for the 2018-19 school year. At its September 22, 2017 meeting, the Board authorized the CEO to execute an agreement with SBL to lease articulated buses for the services. Lastly, at its October 27, 2017 meeting, the Board authorized the CEO to execute an agreement with UCSC to fund all related costs to the pilot project, including vehicle leasing, operator training, and special vehicle pay.

Monitoring of the articulated bus pilot project over the last five months of the 2017-18 school year and the first few months of the 2018-19 school year has shown that these articulated buses are effectively addressing bus overcrowding and the pass-by of students waiting at bus stops by increasing bus capacity during peak service periods.

During the last two quarters of the 2017-18 school year, based on anecdotal information, the pass-by of students was almost completely eliminated. However, UCSC's enrollment patterns vary substantially over the course of the three-quarter school year: peak enrollments occur during the Fall Quarter (19,135 in Fall 2017), with progressively lower enrollments during Winter Quarter (18,647) and Spring Quarter (17,849). While UCSC anticipates enrollment growth of approximately 300 students in Fall 2018, this would result in nearly 1,600 more potential student riders than were enrolled during the Spring 2018 pilot project—resulting in pass-by occurrences again. This will continue to be an on-going issue as enrollment continues to grow.

Another issue contributing to increased loads on METRO buses is the reduced level of UCSC TAPS bus services operating around campus following service reductions introduced this fall.

Analysis suggests that extended boarding time for the higher-capacity articulated buses may impact schedule reliability at peak times. New GPS based analytical tools are being used to gather on-time performance during the fall and winter quarters. Any beneficial minor schedule changes could be implemented for the

spring quarter. Multi-door boarding may be an issue to be considered in the future, pending safety analysis.

METRO staff has concluded that the pilot project has been successful in meeting its objectives of accommodating the growing ridership demand on fixed routes serving UCSC and that these services should become a permanent part of METRO operations.

As the pilot project has proven the value of articulated buses and the increased capacity they provide, METRO has taken steps to acquire articulated buses for our fleet from VTA, which will allow METRO and UCSC to reduce costs associated with the leasing of buses from a third party.

IV. FINANCIAL CONSIDERATIONS/IMPACT

There has been no additional cost for METRO for operating the three articulated buses as UCSC has funded the cost of the lease, training, and special vehicle pay for operators.

V. ALTERNATIVES CONSIDERED

METRO could choose not to operate the articulated buses and accept the reduced quality of service in terms of overcrowding and passenger pass-bys. This is not recommended.

VI. ATTACHMENTS

None

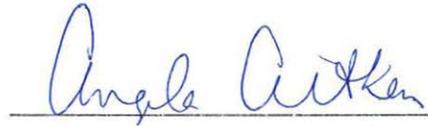
Prepared by: Barrow Emerson, Planning & Development Director

VII. APPROVALS:

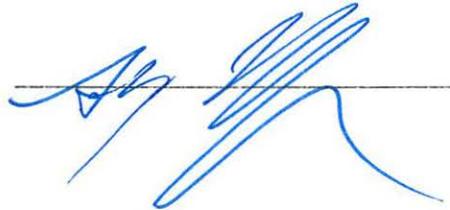
Barrow Emerson
Planning & Development Director



Approved as to fiscal impact:
Angela Aitken, CFO



Alex Clifford, CEO/General Manager





DATE: November 16, 2018
TO: Board of Directors
FROM: Barrow Emerson, Planning & Development Director
SUBJECT: UNIFIED CORRIDOR INVESTMENT STUDY UPDATE

I. RECOMMENDED ACTION

That the Board receive a presentation on the Unified Corridor Investment Study and recommend to the Regional Transportation Commission the following:

- a) Support Bus Rapid Transit (BRT) Lite operational improvements in the Soquel Avenue/Soquel Drive/Freedom Boulevard corridor**
- b) Support pursuit of a Bus-On-Shoulders (BOS) facility on State Route (SR) 1**
- c) Commit to a public transit service and facility in the Rail Corridor and begin implementation planning by conducting in the near term a comprehensive alternatives analysis to determine the most appropriate mode of public transit for the Rail Corridor and to support efforts to secure funding from federal and other sources, and adding a full analysis of operations funding sources as part of the alternative analysis.**
- d) Support mass transit use in the rail corridor in which mass transit would run adjacent to bike and pedestrian facilities, but not under the “rail banking” concept; and, an RTC policy that would commit to funding METRO with TDA-LTF, TDA-STA and TDA-SGR at current percentage levels in perpetuity.**

II. SUMMARY

- The Regional Transportation Commission has conducted the Unified Corridor Investment Study (UCIS), an analysis of potential multi-modal transportation investments in the State Route (SR) 1, Soquel Avenue/Soquel Drive/Freedom Boulevard, and the Santa Cruz Branch Rail Line (Rail Corridor) corridors.
- RTC staff will have presented a preferred “Scenario” to the RTC meeting on November 15, 2018 with selection of a preferred scenario targeted for the December 6, 2018 RTC meeting.
- METRO staff has participated in the development of public transit networks for the UCIS and continues to work with RTC staff to analyzed data presented in the UCIS.
- Key issues of the METRO review of the UCIS include:

- The three corridors service different travel markets and improvements in one do not provide benefits in the others.
- There is a need for a public transit service in the Rail Corridor.
- A concern as to whether Santa Cruz County has the financial capacity to fund additional public transit services and facilities without impacting the current bus system. A review of the UCIS suggests that some funding sources currently used for METRO operations and capital needs are being assumed as possible sources for UCIS projects.
- At METRO's November 16th Board meeting staff will provide a formal presentation on the UCIS and request that the Board make recommendations to the RTC including but not limited to the following:
 - Support BRT Lite operational improvements in the Soquel Avenue/Soquel Drive/Freedom Blvd. corridor.
 - Support pursuit of a Bus-On-Shoulders facility on SR 1.
 - Commit to a public transit service and facility in the Rail Corridor and in the near term begin implementation planning by conducting a comprehensive alternatives analysis to determine the most appropriate mode of public transit for the Rail Corridor and to support efforts to secure funding from federal and other sources, and adding a full analysis of operations funding sources to the alternatives analysis. This is vital as an alternatives analysis is a requirement of receiving federal funding from programs such as New Starts and Small Starts, which fund both rail and BRT projects. Issues to be further analyzed in an alternatives analysis include:
 - Ridership forecasts
 - Operating and capital costs, including “value engineering”
 - Funding sources for capital improvements
 - Funding sources for operating expenses
 - Support mass transit use in the rail corridor in which mass transit would run adjacent to bike and pedestrian facilities, but not under the “rail banking” concept; and, an RTC policy that would commit to funding METRO with TDA-LTF, TDA-STA and TDA-SGR at current percentage levels in perpetuity.

III. DISCUSSION/BACKGROUND

The objective of the Unified Corridor Investment Study (UCS) is to identify multimodal transportation investments that provide the most effective use of SR-1, Soquel Avenue/Soquel Drive/Freedom Boulevard, and the Rail Corridor while best serving the community's transportation needs. The study's goals focus on developing a sustainable and well-integrated transportation system while

maximizing benefits in terms of efficient mobility, health and equity, the natural environment, and economic vitality.

Highway 1 and Soquel Ave/Drive are two of the most heavily traveled roadways in Santa Cruz County. Freedom Blvd provides an extension of Soquel Ave/Drive in the southern portion of Santa Cruz County. The Santa Cruz Branch Rail Line provides a new opportunity to provide transportation options between north and south county.

RTC staff will recommend a preferred scenario at the Nov. 15, 2018 RTC meeting. The final draft of the UCIS will consider the comments received at the November 15, 2018 Commission meeting and any other comments received by 5:00 PM on November 20, 2018. The final draft of the Unified Corridor Investment Study will be presented to the RTC at the December 6, 2018 RTC meeting to be held at 9:00 AM at the County Board of Supervisors Chambers, 701 Ocean St., 5th floor.

METRO staff will provide a detailed review and recommendations for next steps of the UCIS at METRO's November 16th Board meeting.

Key Issues of METRO UCIS Review

METRO staff review of the UCIS identifies the following key issues:

- Acknowledgement that the three corridors serve different and distinct markets and origin/destination pairs. Improvements in any one of the corridors does not provide needed services in the other corridors. Specifically, improvements in the Soquel/Freedom or SR 1 corridors to not address travel needs along the coastal community.
- Need for public transit priority and services in the Rail Corridor
 - A bicycle/pedestrian only facility in the corridor would not address demand for longer distance and higher capacity mobility. As bicycle/pedestrian facilities are possible in the Rail Corridor with either Rail or BRT operations, the desire for these facilities are addressed
 - The scenario-based analysis does not provide enough mode/corridor specific comparable detailed data and information is insufficient to determine the most appropriate public transit mode to pursue in the Rail Corridor
 - Whether Santa Cruz County has the financial capacity to fund METRO's existing network, anticipated and necessary future service expansion that is unrelated to the UCIS, along with these new services and facilities being considered by RTC. All of these services and facilities could draw from the same limited funding sources. A review of the UCIS suggests that some

funding sources currently used for METRO operations and capital needs are being assumed as possible sources for UCIS projects.

Recommendations for transportation improvements in the three corridors in the County transportation system

- Soquel Avenue/Drive and Freedom Boulevard: This corridor between Watsonville and Santa Cruz serves multiple origins and destination pairs including key regional destinations; Cabrillo College and the Dominican Hospital complex. Trip patterns in this corridor include extensive short on/off movements throughout the corridor in both directions throughout the day. With significant urban commercial development immediately adjacent, the ability to provide significant transit priority in this corridor through widening or removal of parking is limited.

The most valuable facilities that could be included in a “BRT Lite” improvement package are those which help maintain the reliability of METRO bus services such as transit signal priority and queue jumps.

- SR 1: METRO currently provides relatively limited bus service in the SR-1 corridor due to extreme peak congestion which results in poor on-time performance and unreliable service. The primary value of transit priority in the SR 1 corridor would be to provide a consistent and predictable trip travel time for peak period services.

Introduction of a High Occupancy Vehicle (HOV) lane would be a major, long-term construction project with a significant cost, which could not be justified by the level of transit service which could be provided. METRO recommends taking advantage of the opportunity to introduce a Bus-On-Shoulders (BOS) facility in conjunction with the auxiliary lane program, which can be constructed relatively quickly and inexpensively relative to an HOV lane project.

- Rail Corridor: METRO strongly recommends that there be a transit priority facility and services in this corridor. As identified during the 2016 METRO Comprehensive Operational Analysis and reinforced by the more recent analysis by transit planning consultant Jarrett Walker, the urban area between Capitola and downtown Santa Cruz has among the most transit supportive demographics in the County in terms of residential density, mixed uses (residential/commercial/retail), zero vehicle households, lower income populations, and a significant population of youth and college-aged residents. Again, proposed improvements in the other two corridors do not address mobility needs in the coastal corridor.

However, the “Scenario-based” approach used in the UCIS did not analyze or present specific data comparison between passenger rail and BRT in this corridor that would provide a clear choice between these options.

The mode selection in this corridor should not be based on a choice between steel and rubber wheels but rather on the service profile (alignment, frequency, daily span of service) that most effectively meets the travel patterns and mobility needs in this area.

Any major public transit facility and services proposed for the corridor would require a significant state and/or federal funding contribution. METRO strongly recommends that a formal alternatives analysis be conducted directly comparing the ridership, operating and capital costs of the options. This type of analysis is required for projects pursuing federal funding such as the New Starts and Small Starts programs, which can fund both rail and BRT projects.

Therefore, as part of the commitment to implementation of a public transit service and facility in the Rail Corridor METRO recommends that in addition to a formal alternatives analysis being undertaken in the near term to identify the type of service and facility that would be most appropriate to meet the specific mobility needs in the corridor; that in order to support efforts to secure funding from federal and other sources, a full analysis of operations funding sources should also be conducted. Having this analysis will support efforts at securing federal funding support, including from the New Starts and/or Small Starts programs.

Issues Requiring Further Analysis

Without stating a preferred mode alternative, METRO staff notes a number of issues which need further investigation and clarity prior to determining the most cost-effective and appropriate service in the corridor including:

- The bus networks and service levels (frequency and span of daily service) provided to RTC for the UCIS were hypothetical for order of magnitude cost purposes and were not the subject of any rigorous detailed analysis of alternative networks as is necessary prior to making such a major investment decision.

- Ridership

Ridership comparisons suggest major differences between rail and BRT ridership based on travel times. There has not been the necessary “value engineering” of various segments of the Rail Corridor to determine with certainty the most cost-effective treatments which would determine alignment opportunities and thereby travel times.

Bus service planning is a balance/tradeoff between travel time and accessibility to the service. More detailed analysis of development patterns and non-motorized paths of access/egress to/from transit are necessary before finalizing placement of stations/stops and choice of service alignment directions.

In addition, the hypothetical bus network provided two levels of service, both express with limited stops (same as rail stations) and an underlying local service with more stops. Again these assumptions were hypothetical with no modeling comparisons of alternatives service scenarios and costs undertaken.

In terms of forecasting ridership, transfers between modes are a significant negative impact on ridership. Total travel time including the time necessary to access to a transit service and wait time which is a factor of frequency and proximity of stops/stations.

It is also necessary to analyze origin and destination pairs and common trip lengths before selecting the best service product and stop/station locations to meet demand. More in depth patronage forecasting would also identify demand levels relative to the capacity of modes which influences service frequency.

- Operating and Capital Funding

METRO is particularly concerned about assumptions regarding the likely availability of funding necessary to build facilities, procure vehicles and operate a public transit solution in the Rail Corridor and its impact on existing funding which METRO uses to maintain its current service.

METRO has analyzed the funding sources it uses to fund bus operations and capital improvements and notes that the three primary sources are allocated through the RTC, which by their RTC Rules and Regulations, has the authority to allocate to other purposes, including rail operations.

To illustrate this point, the chart below shows that RTC has the authority to reallocate upward of \$9 million (highlighted) in funding that METRO has historically received to maintain its bus operations and address its capital needs. As an example, in December of 2017, the RTC chose to exercise its authority and re-allocate 15% of the population based formula of the TDA/STA and TDA/SGR funds escalating to 25% over the next three years to RTC projects.

TDA Funds Apportioned by RTC

TDA/LTF Allocation to METRO

FY18

TDA Total	10,063,403
TDA Reserves	51,656
RTC Reserves	104,191
RTC Admin/Planning	1,144,393
<i>Bike & Ped</i>	190,000
¹ 85.5% METRO	7,074,858

TDA/STA Allocation to METRO

FY18

STA Total	3,540,904
² RTC 99313	1,938,651
METRO 99314	1,602,253
85.5% METRO	3,540,904

TDA/STA-SGR Allocation to METRO

FY18

STA Total	671,079
² RTC 99313	367,417
METRO 99314	303,662
85.5% METRO	671,079

¹ METRO believes that these funding sources could be vulnerable because RTC could change the % to METRO by amending its Rules and Regulations

²RTC's 99313 funds will be allocated, in part, to projects other than METRO beginning FY20 through FY22, at which time METRO's share will be reduced by 25%.

Additionally, a passenger rail service requires an extensive bus feeder network which is traditionally very costly to provide and are a significant use of vehicle and operator resources. The costs of these services need to be considered as part of the cost of the rail service in both capital costs and operating costs (specifically its contribution to cost per trip).

Currently METRO is only able to maintain its bus service at a minimally effective level with available funding and it is acknowledged that in order to attract additional riders there is a need to increase the frequency and span of existing service prior to pursuing new services. Specifically, METRO has service improvement plans in place for when any additional recurring funding becoming available including; improved frequency in the San Lorenzo Valley/Scotts Valley region, introduction of a local Watsonville circulator, increased frequency and expanded span of service in between Capitola and Santa Cruz through the Live Oak area. In addition, to increase general mobility thought the community METRO has plans to introduce alternative service models including microtransit and on-demand services.

Historically, at a number of public transit agencies, the introduction of rail services has resulted in reduced resources for bus operations while requiring additional bus feeder services to support the rail operations.

Access to Significant Destinations

It is a major concern that the proposed rail service does not directly serve any of the METRO transit centers (Pacific Station, Watsonville Transit Center, Capitola Mall Transit Center, or Scotts Valley Transit Center or any major trip generators including UCSC, Cabrillo College and the Dominican Hospital medical complex. Access to any of these locations would require either a significant walk or transfer to another travel mode. Bus transit has the operational flexibility to use a combination of the Rail Corridor and the local street network to provide efficient direct service between origin/destination pairs which justify such.

Capitola Measure L

The success of Measure L in the City of Capitola raises questions about the viability and/or timeframe of a Santa Cruz to Watsonville rail operation. With the focus of Capitola area bus services being the Capitola Mall Transit Center this is not an issue with bus service. This issue also brings into consideration of a staged implementation of a transit priority facility, a strategy for which flexible bus service is adaptable.

Next Steps

METRO staff is continuing to work with RTC staff on analyzing results of the UCIS but strongly recommends that the next step in the decision making process be a formal alternatives analysis process which would allow for detailed investigation of facility costs and service scenarios.

IV. FINANCIAL CONSIDERATIONS/IMPACT

As this is a study of future transportation infrastructure and service opportunities for Santa Cruz County, there is no immediate financial impact for METRO. In the long term however, transportation improvements and services proposed in the

UCIS would require an increased commitment of METRO services and equipment, the funding source of which is as yet undetermined.

V. ALTERNATIVES CONSIDERED

The alternative of not pursuing transit improvements along these three corridors would limit the ability to provide viable attractive options to drive-alone vehicle use. Without competitive public transit options the region cannot address the issues of traffic congestion, air quality, and the economic impact of significant commute times and associated costs,

Not pursuing these improvements is not recommended.

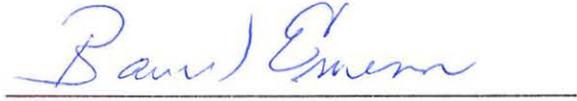
VI. ATTACHMENTS

None.

Prepared by: Barrow Emerson, Planning & Development Director

VII. APPROVALS:

Barrow Emerson
Planning & Development Director



Alex Clifford, CEO/General Manager





DATE: November 16, 2018
TO: Board of Directors
FROM: Angela Aitken, CFO and Acting HR Director
**SUBJECT: CONSIDERATION AND APPROVAL OF THE CPS HR CONSULTING
SEIU CLASSIFICATION STUDY AND NEW POSITIONS
DESCRIPTIONS**

I. RECOMMENDED ACTION

**That the Board of Directors approve the CPS HR Consulting SEIU
Classification Study and new positions descriptions as recommended.**

II. SUMMARY

- An SEIU Classification and Total Compensation Study (Study) was conducted at the Santa Cruz Metropolitan Transit District (METRO), which was needed due to outdated job descriptions, salary range compaction issues, and a desire to attract and retain valuable personnel.
- CPS HR Consulting (CPS) was awarded the contract to conduct this SEIU Study in August 2018.
- The Study was broken down into two stages:
 1. Job Analysis, which included job specification updates and revisions; and,
 2. Total Compensation analysis
- Between August 2018 and November 2018, CPS and METRO staff engaged in Position Description Questionnaires (PDQs), interviews and activities to determine what changes were needed to update existing and outdated job descriptions.
- In November 2018, METRO received CPS's SEIU Classification Study Report, which included revised job descriptions for the SEIU staff positions.
- METRO and SEIU are still meeting and conferring on the new position descriptions at this time.
- Staff and the Personnel Committee recommend that Board of Directors approve the CPS SEIU Classification Study Report and position descriptions in concept.
- That the Board of Directors approve proceeding with the CPS SEIU Classification and Total Compensation Study.

III. DISCUSSION/BACKGROUND

In order to attract and retain talented professionals, both public and private sector organizations periodically perform a comprehensive classification and total compensation review. Such a review helps the organization understand where its pay scales are, relative to pay scales for similar positions, as well as other employee benefits and compensation. For SEIU, reclassifications have been performed every six (6) months per the SEIU Memorandum of Understanding (MOU), Articles 8.2 and 8.7. Per the side letter dated May 10, 2017, METRO and SEIU have agreed to suspend Articles 8.2.3 and 8.7.1 until June 30, 2023, and have a Classification and Total Compensation Study performed for SEIU bargaining unit by December 31, 2018.

In August 2018, the Board of Directors approved to award the SEIU Classification and Total Compensation Study contract to CPS. The scope for this study was to conduct a comprehensive classification and total compensation study to include:

- A review of all seventy-seven (77) SEIU classifications and one hundred thirty-two (132) positions under the SEIU MOU;
- A classification structure that is easily understood, with current job descriptions where distinctions between classifications are clearly identified and individual positions are allocated to the correct classifications.
- A sustainable total compensation system that is competitive in the marketplace, internally equitable, and integrated with the classification structure.

Between August 2018 and November 2018, CPS and METRO staff engaged in activities to determine what changes were needed to update existing and outdated job descriptions. During this process, each staff member completed a Position Description Questionnaire (PDQ), which was followed by an interview with CPS staff if needed. CPS then reviewed the stated duties and responsibilities of each position and created a classification structure, which included revising job titles that are easily understood, current job descriptions where distinctions between classifications are clearly identified, and individual positions are allocated to the correct classifications.

Ensuring proper classification identification is an imperative aspect of a classification study, understanding reporting structure, distinguishing job characteristics, duties, knowledge, skills, and abilities, as conducting accurate total compensation analysis is reliant on accurate job classifications and descriptions.

The outcomes of the interview, questionnaire, and structure review activities will be used to create a revised organizational chart, revised job classifications, creation of class series, and the associated job descriptions. The final step of the Classification Study is for staff to review the final job classification descriptions,

and then meet and confer with SEIU on the resulting position descriptions within the agreed upon class series.

The SEIU Classification Report and corresponding position descriptions and agreed upon class series will be used for the Total Compensation phase of the study.

The Total Compensation phase will include:

- Reviewing the 10 agreed upon labor markets, making recommendations as appropriate, and conducting a total compensation survey of benchmark classifications, within the agreed upon series, to be surveyed within METRO's designated labor markets. Staff recommends that the Committee establish the following labor market agencies for comparison to SEIU classifications:
 - Alameda-Contra Costa Transit District (AC Transit) - non-peer
 - Central Contra Costa County Transit Authority
 - City of Santa Cruz
 - County of Santa Cruz
 - Golden Gate Transit District - non-peer
 - Monterey-Salinas Transit District
 - Riverside Transit Agency
 - San Joaquin Regional Transit District
 - Santa Barbara Metropolitan Transit District
 - Santa Clara Valley Transportation Authority (VTA) - non-peer
- Recommending a methodology development of a comparables market analysis included collecting salary and benefits data on comparable positions from the labor market comparable agencies at market median, 5% below market median, and 5% above market median..
- A recommended salary structure will be developed to achieve market competitiveness and internal equity with a rationale for placement of classifications within the salary structure.

IV. DISCUSSION/BACKGROUND

On November 9, 2018, the Board Personnel/HR Committee recommended:

- That the Board of Directors approve the CPS SEIU Classification Study Report, job classifications (title changes), and position descriptions in concept.

- That the Board of Directors approve proceeding with the CPS SEIU Classification and Total Compensation Study.
- And provide total compensation information at 5% above median, median and 5% below median.

V. FINANCIAL CONSIDERATIONS/IMPACT

The base value previously awarded by the Board of Directors for this contract was \$41,900 to complete the Management Classification and Total Compensation Study. The project is within budget and scope. No project overruns are anticipated.

The option to conduct a SEIU Classification and Total Compensation Study was exercised, as presented with the award of this contract, with the additional cost for SEIU proposed to be \$60,688.

Funds to support this contract are included in the Administration Department FY18 & FY19 Prof/Technical Fees (503031) Operating budget.

VI. ALTERNATIVES CONSIDERED

- The Board could decline to accept the results of the CPS SEIU Classification Plan and Total Compensation Methodology.
 - Staff does not recommend this as METRO's outdated job specifications and salary range compression issues affect the Agency's ability to attract and retain valuable personnel.
- The Board could discuss alternative approaches to the CPS Management Classification and Total Compensation Study and delegate the matter back to the Committee for further review, analysis and the development of a recommendation back to the full Board.

VII. ATTACHMENTS

- Attachment A:** SEIU side letter of agreement – dated May 10, 2017
Attachment B: CPS SEIU Classification Study - dated October 30, 2018
Attachment C: CPS SEIU Position Descriptions - as of October 29, 2018

Prepared by: Angela Aitken, CFO and Acting HR Director

VIII. APPROVALS:

Angela Aitken, CFO and Acting HR Director 

Alex Clifford, CEO/General Manager 

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Attachment A

Side Letter of Agreement: Contract Extension and Modification – as of 05/10/17

Except as specifically provided for below, all other remaining terms and conditions as provided in the Memorandum of Understanding between the Santa Cruz Metropolitan Transit District and the Service Employees International Union – Local 521 for the term of July 1, 2012 through and including June 30, 2015 shall remain in full effect. This Side Letter of Agreement is subject to ratification by the Union membership and approval of the Board of Directors of Santa Cruz METRO.

ARTICLE 8 PERSONNEL ACTIONS

1a) 8.2 Classification Actions

It is agreed that Sec 8.2.3 will be suspended, as of the signing of this agreement, through June 30, 2023.

~~8.2.3 Beginning with the month of December 2001 and annually thereafter, management agrees to conduct three salary surveys on benchmark classifications not listed in Article 8.5.1 or one group defined as the class specifications used to determine a career ladder grouping as listed in Article 8.5.1 as recommended by the Union. The salary survey results shall be completed within six (6) months and reviewed by the Union. The General Manager's decision shall be made within thirty days of receipt and be final unless he/she recommends an adjustment to the Board. The Union may not recommend the same classification or group during the term of this MOU.~~

1b) 8.7 Reclassification

It is agreed that Sec 8.7.1 will be suspended, as of the signing of this agreement, through June 30, 2023.

~~8.7.1 During the month of December, the first three (3) employees whose class specification is not included in any career ladder grouping (as listed in Article 8.5.1), and one group in a class, who submit to the Human Resources Manager a completed request form for reclassification, will be studied. During the month of June the first three (3) employees whose class specification is not included in any career ladder grouping (as listed in Article 8.5.1), who submit to the Human Resources Manager a completed request form for reclassification, will be studied.~~

~~During the month of December the Union can request a reclassification study of one group defined as the class specifications used to determine a career ladder grouping (as listed in Article 8.5.1). The Human Resources Manager will acknowledge receipt of the request within ten (10) working 21 days. An employee may not resubmit a second request while in the same classification for reclassification more than once within a two (2) year period after being studied. The employee and the Union may not resubmit a second request for a reclassification more than once within a two (2) year period after being studied. This provision shall not prohibit management from having additional positions studied other than those submitted by an employee or the Union.~~

~~Management shall provide a written notification to the Union on requested reclassifications including wage comparisons and recommendations. Classification adjustments for Union-~~

Attachment A

Side Letter of Agreement: Contract Extension and Modification – as of 05/10/17

~~initiated group reclassifications shall become effective on the first day of the first pay period following approval by the Board of Directors. Employee requested studies that result in being reclassified to a new or revised classification and result in a wage increase shall be effective not later than the first day of the first pay period of the following July 1 (December request) or January 1 (June request) of each year. However, the implementation of an upward wage increase may be delayed by the number of days beyond thirty (30) that it takes the employee to complete and submit the position information questionnaire form. Up to six (6) hours of the employee's work time will be provided for this task. Failure to complete the form within sixty (60) days will cancel the employee requested study.~~

Note: It is the intent of the parties to suspend Sec 8.2.3 and Sec 8.7.1 until June 30, 2023, and have a Classification and Total Compensation Study performed for the SEIU bargaining unit by December 31, 2018.

2) Santa Cruz METRO will perform a Classification and Total Compensation Study for the SEIU bargaining Unit by December 31, 2018.

The following public Agencies ("comparable Agencies") will be used to gather comparative compensation data for the Classification and Total Compensation Study performed by December 31, 2018:

1. Alameda-Contra Costa Transit District
2. City of Santa Cruz
3. Central Contra Costa County Transit Authority
4. County of Santa Cruz
5. Golden Gate Transit District
6. Monterey-Salinas Transit District
7. Riverside Transit Agency
8. San Joaquin Regional Transit District
9. Santa Barbara Metropolitan Transit District
10. Santa Clara Valley Transportation Authority

The above ten (10) agreed upon comparable Agencies will be studied for the purposes of the Classification and Total Compensation Study to be completed by December 31, 2018 only. The use of the above comparable Agencies is non-precedential.

All parties agree that the Classification and Total Compensation Study to be completed by December 31, 2018 will be performed as a Total Compensation study. Total Compensation means that the study will include all compensation an employer provides to an employee, including all wages and benefits.

Attachment A

Side Letter of Agreement: Contract Extension and Modification – as of 05/10/17

ARTICLE 10 PAY RATES

3) 10.1 Pay Rates

Pay rates for represented classes are shown in Appendix A – Salary Schedules, and are modified pursuant to the following:

An increase of 0% shall be effective June 14, 2018

Note: It is the intent of the parties to receive no pay increase effective June 14, 2018. See Appendix A – Salary Schedules effective June 14, 2018.

ARTICLE 13 PAID LEAVES

4) 13.2 Annual Leave

It is agreed that Sec 13.2.1 will be amended effective July 1, 2017.

13.2.1 An employee shall accrue paid annual leave in lieu of vacation leave or holiday with the exception of 13.3.1 based on the following hours of active service (defined in section 10.9 Salary Schedule Step Advancement):

Hours of Service	Hourly Accrual Rate	Approximate Days Annually
1 – 10,399	0.0846	22
10,400 – 20,799	0.1116	29
20,800 – 31,199	0.1231	32
31,200 +	0.1308	34

Note: It is the intent of the parties to rescind one day of annual leave accrual from each member's accrual rate effective July 1, 2017.

ARTICLE 23 TERM

5) This contract extension and modification shall commence on **May 19, 2017**, and shall expire on **June 30, 2019**.

Note: It is the intent of the parties to modify the terms of the current agreement set to expire June 30, 2018.

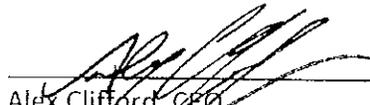
Attachment A

Side Letter of Agreement: Contract Extension and Modification – as of 05/10/17

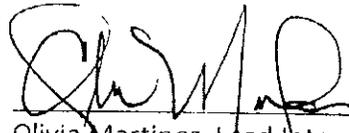
This agreement is entered into by the Service Employees International Union, Local 521 and the Santa Cruz Metropolitan Transit District on May 19, 2017, and is executed on behalf of the parties by the following representatives:

Santa Cruz Metropolitan Transit District

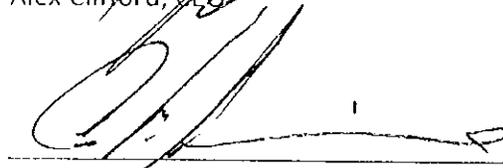
Service Employees International Union, Local 521



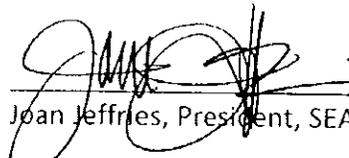
Alex Clifford, CEO

 5/18/17

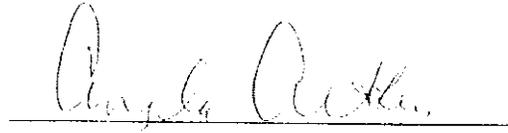
Olivia Martinez, Lead Internal Organizer



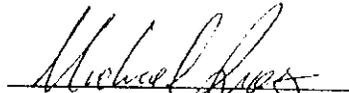
Ciro Aguirre, COO

 5/18/17

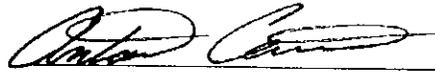
Joan Jeffries, President, SEA Chapter



Angela Aitken, Fin Mgr & Interim HR Mgr

 5/18/17

Michael Rios, President, PSA Chapter



Antonio Castillo, President, VMU Chapter

Private and Confidential

Santa Cruz Metropolitan Transit District

SEIU Classification Study

Draft Classification Report

SUBMITTED BY:

Jan Bentley
jbentley@cpsr.us

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f: 916-561-8466
Tax ID: 68-0067209
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Attachment B

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I. Background

The Santa Cruz Metropolitan Transit District (METRO) retained CPS HR Consulting (CPS HR) to conduct a classification study and total compensation survey of METRO's bargaining units represented by the Service Employees International Union (SEIU). The stated objective of the study was to perform a comprehensive analysis of METRO's current classification and compensation plans for all included study positions, and to provide appropriate classification and compensation recommendations reflective of the work performed and the market value for such work.

The scope of the classification study encompassed 77 classes; a total of 132 positions were identified by METRO staff for individual review and analysis. A list of all classes included in the study is included as [Appendix A](#).

This Draft Classification Study Report outlines the results of the **classification** study. The classification study results are intended to assist METRO in identifying any positions that are inappropriately classified and to support the selection of appropriate benchmark classes for the forthcoming **total compensation** study, which will be provided under separate cover.

II. Classification Study Methodology

Consistent with the study goals provided by METRO, CPS HR identified and accomplished several specific work plan tasks as described below.

Review of METRO Background Materials

In order to initiate the classification study, CPS HR met with the METRO project coordinator to review and finalize the study plan. CPS HR also requested and obtained various documents from METRO, including current classification specifications, salary schedules, position allocations and the most current organizational chart. These documents enabled CPS HR to become familiar with the current organizational/classification structure and provided the framework for understanding the subsequent information to be collected.

Position Description Questionnaires

To gather information on all of the positions included in the study, CPS HR developed a customized Position Description Questionnaire (PDQ) designed to gather comprehensive information about each position including: essential job functions; required knowledge, skills, and abilities; supervision given and received; minimum job qualifications; decision-making responsibility; authority; and physical/mental job requirements. The PDQ form, including instructions for completion, was provided to METRO for distribution to all the study incumbents. CPS HR also requested that a PDQ be completed for any vacant positions that METRO wished to include in the study. A copy of the PDQ form used for this study is provided in [Appendix B](#).

In completing the PDQs, incumbents were instructed to provide information based on their current job responsibilities. They were advised that group PDQs could be submitted if all incumbents in the group performed essentially the same duties and reported to the same supervisor. Upon completion of their portion of the PDQ, incumbents were instructed to submit the document to their supervisor for review and comment. After completing the supervisor section, the PDQ was forwarded to the manager for review and comment. This process is designed to ensure the information provided by incumbents is accurate and complete. All completed PDQs were returned to the METRO project coordinator then forwarded to CPS HR.

The PDQs were initially provided to METRO in September of 2018 and returned to CPS HR on October 5, 2018. Upon receipt, CPS HR thoroughly reviewed each PDQ to analyze the duties and responsibilities assigned to each position and compared them to METRO's current class specifications. This initial review allowed CPS HR to identify positions in which incumbents might be working out of class or positions requiring employee and/or manager interviews in order to obtain additional information. A proposed interview schedule was provided to the METRO project coordinator.

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Incumbent Interviews

CPS HR conducted individual and group interviews on October 19-20, 2018 at the METRO offices in Santa Cruz and also conducted two additional interviews by phone the following week. A total of 21 employees and 8 managers were interviewed, representing 18 classes (approximately 30% of encumbered classes).

The purpose of the interviews was to assist CPS HR in gathering additional information about the job duties and responsibilities associated with each position, and to provide the incumbents an opportunity to explain any comments made on the PDQ that were unclear or inconsistent with the current class of the position. Where possible, group interviews (with a maximum of four participants) were conducted to obtain maximum employee input. Interviews were also scheduled with all of the current department managers to confirm and/or clarify their perspective on various positions.

Classification Data Analysis

The information provided through the PDQs and interviews was utilized to determine the degree to which METRO's current class specifications describe the actual work being performed by the incumbents. The information was also used to develop new or revised draft proposed class specifications and to properly allocate positions based on a proposed classification structure. CPS HR also used the information to identify broad job families as appropriate.

Class Specification Revision and Development

The METRO project coordinator requested that CPS HR utilize a new class specification format for all proposed classes. The project coordinator also stated that it would **not** be necessary for CPS HR to "track" changes using METRO's current specifications but instead requested that CPS HR prepare an entirely new set of specifications, each to include the following:

- **The recommended title for the class.** Some of the classes proposed by CPS HR retained the same titles as the current METRO titles, whereas others have been "retitled" based on the consultants' recommendations. Recommendations were based on common and "best practice" titling for such classes. In a small number of cases, CPS HR has recommended the development of new classes (and new titles) and the abolishment of current METRO classes. A "crosswalk" showing the relationship between the current and proposed class titles is provided in [Appendix A](#).
- **The proposed bargaining unit for the class.** CPS HR recommended bargaining unit assignments consistent with the way that current METRO classes are assigned, with the understanding that final bargaining unit assignment may be a collective bargaining matter.
- **An overview of the class definition.** This includes the level of supervision received.
- **Distinguishing characteristics of the class.** This includes criteria to be used when comparing the subject class to other classes above and below in the same series.

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- **Examples of typical duties and responsibilities typical for positions in the class.**
- **The knowledge and abilities required to do the work.**
- **Recommended minimum qualifications required of job applicants.** In discussing the preferred formatting for this section of the specifications, the METRO project manager requested the addition of a “blanket” statement to all of the specifications, which states that any combination of experience and education that would likely provide the required knowledge and abilities is qualifying.
- **Brief summaries regarding the physical and mental demands of the job, as well as the work environment.** These are designed to comply with the Americans with Disabilities Act (ADA).
- **The job family designation as recommended by CPS HR.**

The format requested by METRO also includes the class code and the overtime status—exempt or non-exempt based on Fair Labor Standards Act (FLSA) criteria—of the class. CPS HR did not identify class codes on the draft class specifications since it is unclear whether those will change because of the study. Likewise, CPS HR did not include FLSA determinations on the draft proposed class specifications pending further discussions with METRO regarding the defensibility of various approaches to making such determinations.

Delivery of Draft Class Study Documents

A complete set of draft proposed class specifications was delivered to the METRO project coordinator on October 29, 2018, along with a basic list matching METRO’s current class titles to those of the proposed specifications. This Draft Classification Report is being provided to METRO separately for review and comment.

III. Conceptual Framework

This section of the report presents a conceptual framework for the classification plan proposed for METRO. The classification analysis, as applied to positions that were included in this study, relies upon sound principles of job evaluation and job analyses. The approach identifies distinct differences in levels and types of work determined by using established allocation factors and class concepts.

Classification Concepts and Principles

A position classification plan is a critical human resources tool. It describes the basic personnel framework within an organization and defines the standards and concepts that are used to maintain and/or change that framework. It serves as the basis for organizing job assignments, developing job announcements, recruiting employees, evaluating qualifications for the job, developing methods for assessing performance, and identifying and making changes in the organizational structure of the organization. It also provides the basic foundation for establishing a compensation plan. Thus, the classification plan impacts virtually every phase of the employment process.

Position classification is a dynamic process since the plan itself and the class specifications must continually respond to the changing needs of the organization. Thus, regular and periodic review of the plan is needed to ensure that it accurately reflects changes in the agency's organizational goals, organizational structure, policy, size and leadership styles. The plan must also respond to changes in technology, programs, legal requirements and characteristics of the workforce.

Once established, the classification plan must be utilized consistently to serve its purpose as a management tool. If employment decisions are not consistent with the plan, then either the plan or the decisions must be amended to be consistent with each other.

Basic Classification Guidelines

Position, Class, Series and Job Family

A **position** represents a group of duties and responsibilities performed by one employee. In contrast, **class** refers to a position or a group of positions that are sufficiently similar in duties and responsibilities that they may be treated the same for purposes of pay, general minimum qualifications, title and a variety of other administrative activities.

A class **series** may be established when two or more classes are related to each other in a linear or related fashion. Typically, classes may be placed in a series when the work performed in the classes is similar in nature but not in level, and when the work performed at the lower level class helps develop the knowledge, skills and abilities to perform work at the higher level. It should be noted, however, that the ability of an individual incumbent to promote from the lower level to the higher level class in a series may still be limited by the availability of a vacant position, unless positions are "flexibly staffed" (see discussion later in this report).

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A **job family** is a group of classes and/or class series that are closely related. Classes in a job family usually have similarities in their employment requirements that may support career progression. However, classes in the same job family may still require different levels of education, experience, skill, effort, or responsibility. For example, a financial job family may include clerical, technical, professional/analytical, supervisory and management classes.

Definition of Classification and Allocation

Classification is the process of identifying and describing the various kinds of work in an organization and grouping similar positions together under the same common job title. **Allocation** is more specifically tied to the placement and/or budgeting of positions within an organization. Thus, a recommendation to allocate a position within an organization is based on the results of the classification analysis for that position.

It is easy to see that several positions belong to the same class when the duties are identical. In practical application, however, the duties and responsibilities of positions do not need to be identical to be placed in a common class. Instead, classification plans generally place positions into classes based on a determination of “sufficient similarity”. Within an individual organization, “sufficient similarity” can be broadly or narrow interpreted. A broad interpretation recognizes positions that share a core set of classification factors, but accepts substantial variation between positions, resulting in broad classes. In contrast, a narrow interpretation might create separate narrow classes to address such variations.

A good classification plan balances “ease of administration” with position validity. Complex classification structures with multiple job families, multiple class series, and multiple levels within each series can be difficult to administer. However, when class concepts are excessively broad and/or too general, position classification maintenance (and responding to out-of-class complaints) is often difficult, time consuming and expensive. In general, when the type of work assigned to different positions varies dramatically, it often makes sense to place them in separate job families so that valid market comparisons can be made. Further, when the level of work within a job family has clear, job-related distinctions, separate classes usually offer the most efficient way to pay for the work that is being done. Thus, a realistic and successful plan usually includes both broad and narrow classes.

The Advantages of Broad Versus Narrow Classes

The implementation of a broad versus narrow classification structure is an organizational policy decision, which is undertaken based upon the organization’s goals and objectives. Both approaches have advantages and disadvantages that should be considered when developing a classification plan.

The advantages of grouping sufficiently similar positions into broad classes include: ease of administering the classification plan; the ability to add, delete or change duties of a position and still be consistent with the classification plan; the ability to transfer individuals laterally within the organization; and a reduced need for recruitment and testing to fill single position classes. Likewise, if an organization desires or needs to have the flexibility to temporarily or permanently move positions between work units, broad classes can be beneficial in allowing movement to occur without creating classification or equity concerns. Such flexibility also minimizes layoffs resulting from reorganization processes and allows for greater employee

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career mobility by broadening the opportunities for advancement. For these reasons, organizations typically choose to group positions into broad classes whenever practical.

On the other hand, broad classes can be challenging when it comes to salary administration. In determining class salaries, most organizations use a combination of market and internal relationship data, tempered with organizational philosophy and experience. An organization that is having difficulty recruiting for a particular type of position may wish to elevate the salary for that position. However, when such positions are part of a broad class, salary changes would impact the entire class. For these reasons, organizations sometimes choose to divide a broad class because of salary issues. If it can be demonstrated that certain types of positions within a broad class are unnecessarily influencing the salary for the entire class, the organization may prefer separate classes so that salaries for each position group can be established.

Preponderance

Some positions may have a mixture of duties related to several different occupational fields, and incumbents may even have various levels of responsibility. In these cases, allocation of the class is based on the preponderant duties. Since preponderance considers importance, it should be noted that the most time-consuming duties of a position are not necessarily preponderant, nor are they the most responsible and complex duties. However, such is the case most of the time.

Classification of the Position, Not the Employee

The class of a position should be consistent regardless of who holds the position. As such, the classification study process classifies **positions**, not individual **employees**. In fact, positions are generally evaluated based on what they would look like if vacant or occupied by other employees.

Furthermore, classification does not consider the capabilities of individual employees or the efficiency and effectiveness of an incumbent. It is not a measure of how well an individual employee performs. Classification is not a tool to reward individual achievement, nor should classes be created simply to reward length of service.

Level and Not Volume of Work

Position classification reflects the **type** and **level** of work performed by an employee, and thus it is generally independent of **volume**. If one employee has twice the amount of work of another, yet they spend the same percentages of time on those tasks and other duties are comparable, they will be placed in the same class. In fact, study questionnaires do not ask for, and CPS HR does not consider, the relative productivity of employees as a classification factor. A classification study does not consider the volume of work produced because problems of excessive workload are properly solved by redistributing work or adding employees, not by reclassifying existing positions.

Using Classification Factors

To develop classification/allocation recommendations, each position is first analyzed based on the **nature** of work performed. Nature of work refers to the occupation, profession or subject matter field in which

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each position falls. Positions that perform work of a similar nature are considered to be in the same “job family”. Within each job family, the **level** of the position is then established based on various factors such as:

- **Scope and Complexity** - defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification and the variety and nature of work performed.
- **Decision-Making/Authority** - consists of (a) the decision-making responsibility and degree of authority, independence or latitude that is inherent in the position, and (b) the impact of the decisions. This also considers the extent to which rules, regulations, manuals, procedures, prescribed work practices, principles, policies, or other written instruction or methods are available or required to perform the work.
- **Contact with Others Required by the Job** - measures (a) the types of contacts, and (b) the purpose of the contacts.
- **Supervision Received and Exercised** - describes the level of supervision received from others and the nature of supervision provided to other workers. It also relates to the independence of action inherent in a position.
- **Knowledge, Skills and Abilities** - defines the minimum requirements to qualify for the position, including the training, education, experience, licenses, certificates, physical demands, mental exertion and other factors necessary to perform the assigned responsibilities.
- **Authority/Responsibility** - defines the impact on the organization, including accountability and the likelihood/consequence of error.
- **Work Conditions** – identifies a hazardous, dangerous or unpleasant environment, and notes any adverse conditions.

This information is then used to develop a class specification (description) for each identifiable body of work. Individual positions can then be compared against the class specifications to determine how they should be allocated.

Class Level and Titling Conventions

Within any organization, the use of class titles and levels should be based on the specific needs of the organization. At the same time, certain standardized titling and leveling conventions are commonly used when establishing classification plans.

By themselves, titles do not define positions. However, the use of consistent titling conventions can help an organization present a clear picture of its classification structure. That said, titles are often one of the most sensitive issues within an organization. Titles are sometimes perceived as a measure of importance, and thus, employees can be very concerned about title changes. However, when used properly, class titles can provide a quick visual tool for identifying class type and level.

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Like titles, class levels typically follow standard conventions. The following are some of the standardized class levels and titles that may exist within a job family and were applied to the classification of the positions included in this study.

- **Entry/First Working-Level** – is commonly identified as the first level in a multi-level series. Most entry-level classes describe positions that provide on-the-job training to employees and thus do not require job applicants to have substantial related work experience. In such situations, entry-level classes function as “trainee” classes and as experience is obtained, employees perform their duties with less immediate supervision.

In some organizations, the first class in a series may be more appropriately described as the “first working” level of the series rather than the “entry” level because the job requires applicants to have previous experience performing similar work and thus they are not newly “entering” the profession.

- **For METRO**, several “first working-level” classes have been proposed where it appeared that workers hired at the first level would likely be promoted to the journey-level class when fully qualified. We have utilized a consistent titling strategy in such cases, using the Roman Numeral “I” after the descriptive portion of the class title (e.g., Accountant I).
- **Journey-Level** – may be the second working-level class in a multi-level class series, but always describes the class where incumbents are fully trained to perform the majority of non-specialized, non-leadership class series work. If a “working-level” class is not part of a series, it is still a “journey-level” class if incumbents will ultimately be expected to perform the full range of non-specialized, non-leadership duties. They may also assist in training and providing direction to others, particularly those at the entry level.
 - **For METRO**, proposed journey-level classes that are the second level in a series have been identified by adding the Roman Numeral “II” after the descriptive portion of the class title (e.g., Accountant II). However, many of the proposed journey-level classes are not in a series and therefore were not given a numerical designation. Instead, they were given a broadly descriptive title (e.g., “assistant”, “worker”, “mechanic”, “representative”, “analyst”, “officer”, etc.).
- **Advanced Level** – this is typically the level in a series that follows the journey level. Positions at this level have advanced or “specialized” assignments that are not given to all positions in the series. Examples of advanced/specialized roles are serving as a lead worker over subordinate staff and coordinating a program. In any case, “advanced” designation is only appropriate if the duties are above the journey-level and position allocations are limited. For that reason, not all class series have an advanced level class.
 - **For METRO**, most advanced-level classes are identified by word **senior** in the title (e.g., Senior Custodial Service Worker).

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- **Technician** – is sometimes used by organizations to identify skilled trade classes or those with a technology emphasis. However, the term “technician” also describes sub-professional administrative classes where incumbents must regularly interpret and apply specialized laws, regulations and/or policies in order to make difficult decisions.
 - **For METRO**, technical-level classes are identified by the use of the word **technician** in the title. Some technician classes exist in series (e.g., Accounting Technician I and II). However, others may be a stand-alone journey-level class.
- **Specialist** – is a broad term that can be used to describe multiple positions and multiple levels. By itself, it is not a leveling term. However, within a series, it is typically used to describe a class above the journey-level where lead work or program coordination is not a preponderant duty.
- **Coordinator** – is also a broad term that is occasionally used when “coordination” of a program of function is the preponderant assignment of the class. While it is not necessarily a leveling term, it would generally be appropriate for a class above the journey level when the class is part of a series.
- **Analyst** – is a title used only for professional-level classes where the preponderant duties involve breaking down a complex problem into various components; conducting research to understand how the components interact with and impact each other and how each component affects the problem; using the information gained to develop a recommendation on how to solve the problem; and preparing a comprehensive report that describes the proposed solution to the problem and explains how that conclusion was reached. Analyst classes typically require education equivalent to at least a bachelor’s degree and varying amounts of post-graduate experience.
- **Supervisor** – is used for positions where the preponderant responsibility is to supervise subordinate positions. Supervisors may also perform day-to-day work similar to their subordinates in type, but usually are responsible for the more difficult or sensitive work in addition to their supervisory duties. Supervisory criteria can vary between organizations, but most supervisory classes are defined by their supervision over “regular” (full-time) employees. In most public agencies, regular employees have statutory employment rights and personnel actions imposed on them, such as hiring/firing, corrective action, and performance evaluations, and must comply with legal, contractual and/or policy guidelines. Furthermore, several State and federal laws define supervisors as being legally responsible for their employment-related actions. Thus, true supervision is a distinct, complex and highly responsible duty.

Within a class series, a supervisory-level level class would be appropriate for a position that supervises subordinate positions in the same series. For example, an Accountant Supervisor is necessary to supervise the work of other professional Accountants. However, supervision of positions in a lower-level series does not necessarily justify classification to a supervisory class. For example, a position that only supervises Accounting Clerks and Accounting Technicians would

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not necessarily have to be classified as an Accountant Supervisor. Instead, such supervisory duties could appropriately be assigned to an Accountant II.

It is also important to distinguish between “true” supervision and lead work. Incumbents that assign, direct, and monitor the work of subordinate staff but do not have substantial control over subordinates’ employment through personnel actions like hiring/firing, corrective action, and performance evaluations, are not “supervisors”. Instead, such positions may be most appropriately classified to a lead worker class.

- **For METRO**, supervisory classes are distinguished by the word **supervisor** or **supervising** in the class title.

Flexible Allocation

Flexible allocation is an administrative and budgeting tool that assists organizations in planning for work that can be assigned at more than one class level. In a flexibly allocated position, an employee may be hired at an initial level (e.g., the entry or first-working level) and then be promoted to the next level without a competitive process when the qualifications for the next level are met.

Flexible allocation is beneficial when an organization is willing to initially hire an employee with limited qualifications, provide the training needed for the employee to learn and eventually perform the full scope of journey-level duties, and then promote the employee to the next level when qualified without requiring a visible competitive process (no vacancy is necessary). Instead, it is the employee’s demonstrated performance of the higher-level duties that functions as the “test” by which promotion is justified. By flexibly allocating the position, the organization gets the benefit of bringing new employees into the organization at a lower (and less costly) level, while allowing the organization to appropriately classify their positions if/when the duties change without going through a cumbersome recruitment or classification process. Thus, it is useful for both recruitment and retention.

Since promoting from one level to the next higher level in a flexibly allocated position may be viewed as a promotion without an official, merit-based test, the manager/supervisor should provide written measurement of the employee’s performance with attention to timeliness, accuracy and detail. The employee’s performance should be at a level that clearly demonstrates that a promotion is warranted. Criteria for advancement should be based on an established policy decision prior to implementing flexible allocation and should be sufficiently understood that it can be articulated to all staff. Where flexibly allocated positions exist in multiple divisions, consistent development and application of promotional criteria is essential.

Career Ladders

While flexible staffing addresses the natural progression of work that is expected in many jobs, career ladders are designed to identify and facilitate opportunities for employees to progress to a higher level of job responsibility. The degree to which an organization should proactively incorporate career ladders into its classification plan should be based on three primary preconditions: 1) the organization must have a

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genuine business need for higher-level work, and should not promote employees simply to retain them; 2) employees must be both interested in the higher level work and willing to develop their ability to perform it successfully; and 3) the organization must consider it preferable to retain employees rather than bring in new people who have gained experience elsewhere.

Ultimately, the degree to which an employer actively facilitates employee career progression may have the most significant impact on employee professional growth. Employer-paid training, educational reimbursement, and educational incentives provide proactive and effective ways of encouraging employees to improve their education and skills. However, there are also several ways that a classification plan can be designed to support such growth.

One of the first things an employer can do to encourage employee growth and development is to identify job families and class series so that employees can see which classes are “related” to each other. As noted earlier in this report, a “job family” is broader than a “class series”, and a job family may include several class series.

- **For METRO**, CPS HR has retitled classes to improve the visibility of class relationships.

Second, incorporating “distinguishing characteristics” language into the class descriptions assists employees in recognizing the differences between levels within a class series. Thus, employees are better able to identify the work performed at the different levels of the series.

- **For METRO**, CPS HR has added a “distinguishing characteristics” section to all of the proposed class specifications.

Third, employers can facilitate employee progression by allowing experience in a lower level class to substitute for some of the requirements required at the higher-level class. If an employer uses “inflexible” recruitment standards, substitution language can be incorporated individually into the class descriptions. As an alternative, employers may choose to incorporate “flexible” language into the class specifications which give the employer the option of evaluating each applicant’s background on a case-by-case basis. Thus, while a class may normally require a bachelor’s degree, flexible language that allows for “any combination of education and/or experience that provides the require knowledge and abilities” to be qualifying gives the employer the ability to make exceptions.

However, there are practical limitations to the use of flexibly qualification standards. If the bachelor’s-level education is essential to meet professional or licensing standards, it is not reasonable to promote an employee who does not meet such standards into the job. Likewise, if an employer is inconsistent in utilizing such flexibility (e.g., allowing employee “A” to qualify without the degree but requiring employee” B” to have it), the employer could be vulnerable to accusations of bias. Consistent application of “flexible” recruitment standards is the key to their success.

- **For METRO**, CPS HR has added a flexible statement to each class specification which allows for consideration of each applicant’s qualifications on a case-by-case basis, while still identifying the education, training and experience qualifications that would typically be considered qualifying.

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Finally, employers who wish to encourage upward mobility in the workforce are wise to continuously monitor their class plan for consistency with best market practices, particularly in terms of class titling, leveling and recruitment standards. For example, requiring a bachelor's degree to qualify for a job when similar employers in the market only require experience to qualify for the same job, will discourage employees from promoting and will likely encourage them to seek work elsewhere. On the other hand, the absence of reasonable employment standards that are consistent with the market will suggest to employees that longevity is the primary basis for promotion and they will have no motivation for self-improvement.

- **For METRO**, CPS HR incorporated a number of changes to the proposed draft class specifications to make them more consistent with best market practices in terms of recruitment standards, including changes to titles and minimum qualifications. CPS HR has also clarified the relationships between classes in terms of leveling.

IV. Findings and Recommendations

Overview

Included as appendices in this report are several documents that summarize the findings and recommendations of this classification study.

- [Appendix A](#) provides a “crosswalk” to show the relationship between current and proposed class titles and provides brief summary comments about any changes CPS HR made to the classes.
- [Appendix B](#) provides a copy of the Position Description Questionnaire (PDQ) used in the study.
- [Appendix C](#) provides a table summarizing the allocation recommendations for all of the study positions, sorted by incumbent name and including comments.
- [Appendix D](#) provides the same information as Appendix C, sorted by current class title.

Explanation of Terms

The appendices include the following terms to describe the actions being recommended by CPS HR.

- **Maintain** is recommended when the duties and responsibilities of the position are identified as consistent with both the current METRO class specification and the proposed draft class specification prepared by CPS HR.
- **Retitle** is recommended when the current class title is not optimally descriptive of the work and/or is not consistent with best market practice for similar types of jobs.
- **Reclassify** is recommended when the work being performed by the incumbent is substantially different than what is described by the current class specification for the position. Positions are either reclassified to an existing METRO class or to a newly developed class, depending on whether an appropriate METRO class currently exists.

V. Conclusion

Based on conversations with the METRO project coordinator, CPS HR is aware that METRO is interested in evaluating the proposed classification plan as it relates to the agency's long-term organizational goals. Specifically, the project coordinator indicated that some of the currently vacant classes might not be necessary in the future or that some additional classes might be necessary to support the organization's strategic plan.

Although a deeper analysis and understanding of METRO's long-term organizational goals is beyond the scope of this current study, CPS HR welcomes an opportunity to participate in a future discussion about how CPS HR can assist METRO in achieving their organizational development goals and objectives.

CPS HR Consulting is pleased to provide this Draft Classification Study Report to the Santa Cruz Metropolitan Transit District. CPS HR welcomes feedback from METRO and will await response to this Draft Report before submitting a Final Report.

**Appendix A: Current and Proposed Class
Crosswalk**

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Original Job Title	New Title	Comments
Receiving Parts Clerk	<Abolish>	Reclassify incumbent to Parts Clerk and abolish class because it is indistinguishable from Parts Clerk; department manager supports
Transportation Planning Aide	<Abolish>	Abolish class because it duplicates Transportation Planner I (vacant class)
Lead Custodian (Custodial Coord)	<See Custodial Supervisor>	Reclassify incumbent to new class of Custodial Supervisor and abolish this class; department manager supports
Customer Service Coordinator	<See Customer Service Supervisor>	Reclassify incumbents to Customer Service Supervisor and abolish this class; department manager supports
Accessible Services Coordinator	Accessible Services Coordinator	Updated specification but class concept remains consistent with original
Accountant I	Accountant I	Updated specification but class concept remains consistent with original
Accountant II	Accountant II	Updated specification but class concept remains consistent with original
Supervising Accountant	Accountant Supervisor	Updated and retitled specification but class concept remains consistent with original
Account Clerk	Accounting Clerk	Updated and retitled specification but class concept remains consistent with original
Accounting Technician	Accounting Technician I	Updated and retitled specification but class concept remains consistent with original
Senior Accounting Technician	Accounting Technician II	Updated and retitled specification but class concept remains consistent with original
Accounting Specialist	Accounting Technician Specialist	Updated and retitled specification but class concept remains consistent with original
Administrative Assistant	Administrative Assistant	Updated specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Administrative Specialist	Administrative Specialist	Updated specification but class concept remains consistent with original
Administrative Assistant Supervisor	Administrative Supervisor	Updated and retitled specification but class concept remains consistent with original
Administrative Clerk I	Administrative Clerk	Updated and retitled specification but class concept remains consistent with original
Benefits Administrator	Benefits Technician	Updated and retitled specification but class concept remains consistent with original
Claims Investigator I	Claims Technician I	Updated and retitled specification but class concept remains consistent with original
Claims Investigator II	Claims Technician II	Updated and retitled specification but class concept remains consistent with original
Custodial Service Worker I	Custodial Service Worker	Updated and retitled specification but class concept remains consistent with original
<None>	Custodial Supervisor	Recommend new class to appropriately describe job
Customer Service Representative	Customer Service Representative	Updated specification but class concept remains consistent with original
<None>	Customer Service Supervisor	Recommend new class to appropriately describe job
Electronic Technician	Electronic Technician	Updated specification but class concept remains consistent with original
Facilities Maintenance Worker I	Facilities Maintenance Assistant	Updated and retitled specification but class concept remains consistent with original
Facilities Maintenance Supervisor	Facilities Maintenance Supervisor	Updated specification but class concept remains consistent with original
Facilities Maintenance Worker II	Facilities Maintenance Worker	Updated and retitled specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Financial Analyst	Financial Analyst I	Updated and retitled specification but class concept remains consistent with original
Senior Financial Analyst	Financial Analyst II	Updated and retitled specification but class concept remains consistent with original
Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Updated specification but class concept remains consistent with original
Grants/Legislative Analyst	Grants/Legislative Analyst	Updated specification but class concept remains consistent with original
Human Resources Generalist	Human Resources Analyst	Updated and retitled specification but class concept remains consistent with original
Human Resources Clerk	Human Resources Clerk	Updated specification but class concept remains consistent with original
Human Resources Specialist	Human Resources Specialist	Updated specification but class concept remains consistent with original
Personnel Technician	Human Resources Technician	Updated and retitled specification but class concept remains consistent with original
IT Technician	IT Technician I	Updated and retitled specification but class concept remains consistent with original
Senior IT Technician	IT Technician II	Updated and retitled specification but class concept remains consistent with original
Legal Secretary	Legal Secretary	Updated specification but class concept remains consistent with original
Mechanic I	Mechanic I	Updated specification but class concept remains consistent with original
Mechanic II	Mechanic II	Updated specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Mechanic III	Mechanic III	Updated specification but class concept remains consistent with original
Paralegal	Paralegal	Updated specification but class concept remains consistent with original
Paratransit Eligibility Coordinator	Paratransit Eligibility Coordinator	Updated specification but class concept remains consistent with original
Supervisor/Parts & Materials - FM	Parts and Materials Supervisor	Updated and retitled specification but class concept remains consistent with original
Payroll Specialist	Payroll Technician	Updated and retitled specification but class concept remains consistent with original
Planning Analyst	Planning Data Analyst	Updated and retitled specification but class concept remains consistent with original
Transit Surveyor	Planning Program Aide	Updated and retitled specification but class concept remains consistent with original
Purchasing Agent	Purchasing Agent	Updated specification but class concept remains consistent with original
Purchasing Assistant	Purchasing Technician	Updated and retitled specification but class concept remains consistent with original
Revenue Specialist	Revenue Collection Clerk	Updated and retitled specification but class concept remains consistent with original
Supervisor of Revenue Collection	Revenue Collection Supervisor	Updated and retitled specification but class concept remains consistent with original
Safety & Training Coordinator	Safety and Training Coordinator	Updated specification but class concept remains consistent with original
Assistant Safety and Training Coord	Safety and Training Instructor	Updated and retitled specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Safety Specialist	Safety Program Specialist I	Updated and retitled specification but class concept remains consistent with original
Senior Safety Specialist	Safety Program Specialist II	Updated and retitled specification but class concept remains consistent with original
Schedule Analyst	Scheduling Specialist	Updated and retitled specification but class concept remains consistent with original
Custodial Service Worker II	Senior Custodial Service Worker	Updated and retitled specification but class concept remains consistent with original
Senior Customer Service Representative	Senior Customer Service Representative	Updated specification but class concept remains consistent with original
Senior Facilities Maintenance Worker	Senior Facilities Maintenance Worker	Updated specification but class concept remains consistent with original
Lead Mechanic	Senior Mechanic	Updated and retitled specification but class concept remains consistent with original
Paralegal with HR Duties	Senior Paralegal	Updated and retitled specification but class concept remains consistent with original
Senior Payroll Specialist	Senior Payroll Technician	Updated and retitled specification but class concept remains consistent with original
Lead Parts Clerk	Senior Stock Clerk	Updated and retitled specification but class concept remains consistent with original
Senior Transportation Planner	Senior Transportation Planner	Updated specification but class concept remains consistent with original
Vehicle Service Technician	Senior Vehicle Service Worker	Updated and retitled specification but class concept remains consistent with original
Parts Clerk	Stock Clerk	Updated and retitled specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Systems Administrator	Systems Administrator I	Updated and retitled specification but class concept remains consistent with original
Senior Systems Administrator	Systems Administrator II	Updated and retitled specification but class concept remains consistent with original
Ticket and Pass Program Specialist	Ticket and Pass Program Specialist	Updated specification but class concept remains consistent with original
Transit Supervisor	Transit Supervisor	Updated specification but class concept remains consistent with original
Junior Transportation Planner	Transportation Planner I	Updated and retitled specification but class concept remains consistent with original
Transportation Planner	Transportation Planner II	Updated and retitled specification but class concept remains consistent with original
Transportation Planning Supervisor	Transportation Planning Supervisor	Updated specification but class concept remains consistent with original
Upholsterer I	Upholsterer I	Updated specification but class concept remains consistent with original
Upholsterer II	Upholsterer II	Updated specification but class concept remains consistent with original
Body Shop Repair Mechanic	Vehicle Body Repair Mechanic	Updated and retitled specification but class concept remains consistent with original
Vehicle Service Detailer	Vehicle Service Detailer	Updated specification but class concept remains consistent with original
Vehicle Service Worker I	Vehicle Service Worker I	Updated specification but class concept remains consistent with original
Vehicle Service Worker II	Vehicle Service Worker II	Updated specification but class concept remains consistent with original

Appendix B: Santa Cruz METRO SEIU PDQ Form

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Purpose

The position description questionnaire (PDQ) is designed to obtain information about jobs within the organization for classification purposes only.

The goal of the PDQ is to capture a **current** and **accurate** picture of the work being performed within a specific position. The information collected will be used to update classifications as necessary and make recommendations to management. This questionnaire will be used to evaluate the duties that constitute the **position**, not the performance or qualifications of the **employee**.

Employee

There are response boxes in each section where you may provide information about your position. Use the summary boxes to confirm accurate information in your job description, write in new or additional tasks/functions as needed, explain changes or corrections that should be made, and provide any other feedback to be considered during the review process.

When completing the PDQ, you may:

- Use your existing job description for reference while completing the PDQ.
- Complete as a group only if all respondents are in the same classification and department, under the same supervisor, and most importantly, perform identical duties to yours.
- You may attach additional information such as organizational charts, job flyers, etc., with your PDQ.

Completing the PDQ

If completing electronically

If you have difficulty opening or completing the document, please ensure that your MS Office Word is compatible with Word 2010 (.docx). This document will not work in Word 97-2003 (.doc).

1. Save PDQ to your computer using the file naming convention of *Classification_LastName-First Name_SCMTD_PDQ.doc*

Example: Accountant_Smith-John_SCMTD_PDQ.doc
2. Save additional documentation as a separate document using the file naming convention of *Classification_Last Name-First Name_SCMTD_Supporting*
3. Email the completed PDQ and additional documentation to CPS HR.

The PDQ should be completed by the employee, direct supervisor, and manager. The Manager will submit the completed PDQ to SCMTD Human Resources. CPS HR will only accept PDQs from your human resources contact.

Upon completion of the PDQ, please send to classandcomp@cpsshr.us by Friday, October 1, 2018.

Thanks again for your participation! If you have any questions, please contact:

Angela Aiken	AAitken@scmtd.com	(831) 420-2530
Jennifer Ramos	jramos@cpsshr.us	(916) 471-3125
Lynda Guerra*	classandcomp@cpsshr.us	(916) 471-3473
(*technical support)		

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EMPLOYEE INFORMATION

Name:

Work Phone Number:

Work Location:

Work E-mail Address:

Current Classification Title:

Length of Time in Current Position:

Supervisor's Name:

Supervisor's Classification Title:

If group PDQ, please add all additional respondents. If any of the answers to the following questions are 'no' for an individual, they must complete a separate PDQ.

Full Name	Time in Current Position	Same Classification	Same Supervisor	Same Department
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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SECTION 1: JOB SUMMARY

1A: Classification Definition

In three to five sentences, briefly describe the **major** purpose(s) and/or function(s) of your job.

For example:

“One of the main purposes of the position is to review civil engineering plans for commercial development. Another is to generate plans for capital improvement, which includes survey work, engineering design, plan drafting, and costing.”



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SECTION 2: POSITION FUNCTIONS

2A: Essential Functions

List the essential job functions of your classification. Most jobs consist of 8 – 10 essential functions.

As you provide a description of your essential functions, please use terms that anyone reviewing this form will be able to understand. Avoid abbreviated, vague, or abstract words, such as “assists”, “handles”, “keeps”, or “prepares”, unless you describe how you assist, what you prepare, etc. Be specific. For example:

DO THIS

- Receives, opens, time stamps, and distributes incoming mail
- Calculates, verifies, and posts billing amounts
- Maintains accurate records on the flow of input information, output records, machine operations, operator assignments, and staff time

DON'T DO THIS

- Assists in handling mail
- Prepares final billings
- Keeps records

In addition to writing the statements, please rate each on frequency, importance, needed at entry, whether added in past year, % of time spent on the task, where the work comes from, and work with whom to complete.

Statement Rating

- **Frequency:** How frequently do you perform this task?
 - **Never.** I do not perform this task in my job.
 - **Infrequently.** I perform this task no more than once a month.
 - **Somewhat frequently.** I perform this task no more than once a week.
 - **Frequently.** I perform this task several times a week, but no more than once a day.
 - **Very frequently.** I perform this task several times each day.
- **Importance:** How important is this task for successfully performing your job?
 - **Not important.** This task is not important to my job. Failure to successfully perform this task typically has no consequence.
 - **Minor importance.** This task is of minor importance to my job. Failure to successfully perform this task has little or no consequence.
 - **Important.** This task is important to my job. Failure to successfully perform this task has some negative consequences.
 - **Critical.** This task is one of the most essential tasks of my job. Failure to successfully perform this task has significant negative consequences.
- **Needed at Entry:** Is it necessary to know how to perform this task upon entry into this job?
 - **No** = Success in this job does not require proficiency in this task prior to entry. Job demands allow a newly hired person to acquire task proficiency through training or experience on the job.
 - **Yes** = Success in this job requires experience performing this task prior to entry. Job demands require task proficiency soon after hire (for example, in the first week or so) and there is no opportunity to learn to perform this task through training or experience on the job.
- **Added in Last Year:** Was the task added in the past year?

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- **% of Time Spent on Task:** Provide the approximate percent of time spent on each essential function. The total of all percentages should equal 100%. If the total percent of time spent on tasks totals more than 100% due to overlap in duties, please explain in the text box below.

Attachment B

	1	2	3	4	5	6	7	8
#	Essential Function	Frequency	Importance	Needed at Entry	Added in Last Year	% of time Spent on Task	Where Does Work Come From	Work with Whom to Complete
1		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
2		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
3		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
4		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
5		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
6		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
7		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			

Attachment B

	1	2	3	4	5	6	7	8
#	Essential Function	Frequency	Importance	Needed at Entry	Added in Last Year	% of time Spent on Task	Where Does Work Come From	Work with Whom to Complete
		<input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Critical					
8		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
9		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
10		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
11		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
12		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			

Attachment B

2B: Occasional Functions/Special Tasks & Duties

List other tasks/duties not listed in Section 2A that are performed occasionally as part of the job. If you need more space, attach additional pages.

Frequency: Indicate the number of times per week/month/quarter/year etc., or number of hours per week/month etc.

#	Occasional/Special Function	Frequency	Added in Last Year
1			<input type="checkbox"/> Yes <input type="checkbox"/> No
2			<input type="checkbox"/> Yes <input type="checkbox"/> No
3			<input type="checkbox"/> Yes <input type="checkbox"/> No
4			<input type="checkbox"/> Yes <input type="checkbox"/> No

2C: Similar Duties Performed by Others

Do any other employees perform duties similar/identical to this job? If so, list their names and titles.

#	Employee	Title
1		
2		
3		
4		

Attachment B

2D Continued – Comments

Please provide any additional comments for review regarding **essential function**.



Attachment B

SECTION 3: KNOWLEDGE/SKILLS/ABILITIES

Knowledge, Skills, and Abilities (KSAs) are defined as:

- **Knowledge:** A body of information that an individual must know to perform an activity; understanding gained through experience or education. (Examples: Knowledge of Departmental Rules and Regulations, and Knowledge of UNIX programming language/protocols)
- **Skill:** A learned physical/psychomotor act. (Examples: driving a car, using hand tools, and typing)
- **Ability:** The potential to apply a knowledge or skill to a given situation; abilities usually involving cognitive processing. (Examples: mathematical ability, ability to communicate orally, writing ability, and ability to read blueprints)

Briefly and accurately report the KSAs needed to perform this position. You may refer to your current job description. Rate each statement on importance, whether needed at entry, and value.

After reading the KSAs, rate each statement on the following:

- **Importance:** How important is this KSA for successfully performing your job?
 - **Not important.** This KSA is not important to successful performance.
 - **Minor importance.** This KSA is of minor importance to successful job performance.
 - **Important.** This KSA is important for successful performance.
 - **Critical.** This KSA is essential to the job and is critically important to successful performance.
- **Needed at Entry:** Is this KSA needed upon entry into this job? In other words, must an individual be competent in a particular area before entering the job, or is an individual expected to gain competence through training or experience on the job?
 - **No** = Successful job performance does not require proficiency in this KSA prior to entry. Competence in this area must be developed over time through training or experience on the job.
 - **Yes** = Successful job performance requires this KSA prior to entry. Competence in this area is difficult to acquire, and job demands require this KSA soon after hire (for example, in the first week or so).
- **Distinguishing Value:** Beyond a minimally required level, do employees who have greater competence in this KSA perform more effectively than employees who are less competent in this KSA?
 - **No** = Success in this job does not require proficiency in this task prior to entry. Job demands allow a newly hired person to acquire task proficiency through training or experience on the job.
 - **Yes** = Success in this job requires experience performing this task prior to entry. Job demands require task proficiency soon after hire (for example, in the first week or so) and there is no opportunity to learn to perform this task through training or experience on the job.

Attachment B

3A: Knowledge Statements

#	Knowledge Statement	Importance	Needed at Entry	Distinguishing Value
1		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
9		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
10		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Attachment B

3B: Skill Statements

#	Skill Statement	Importance	Needed at Entry	Distinguishing Value
1		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
9		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
10		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Attachment B

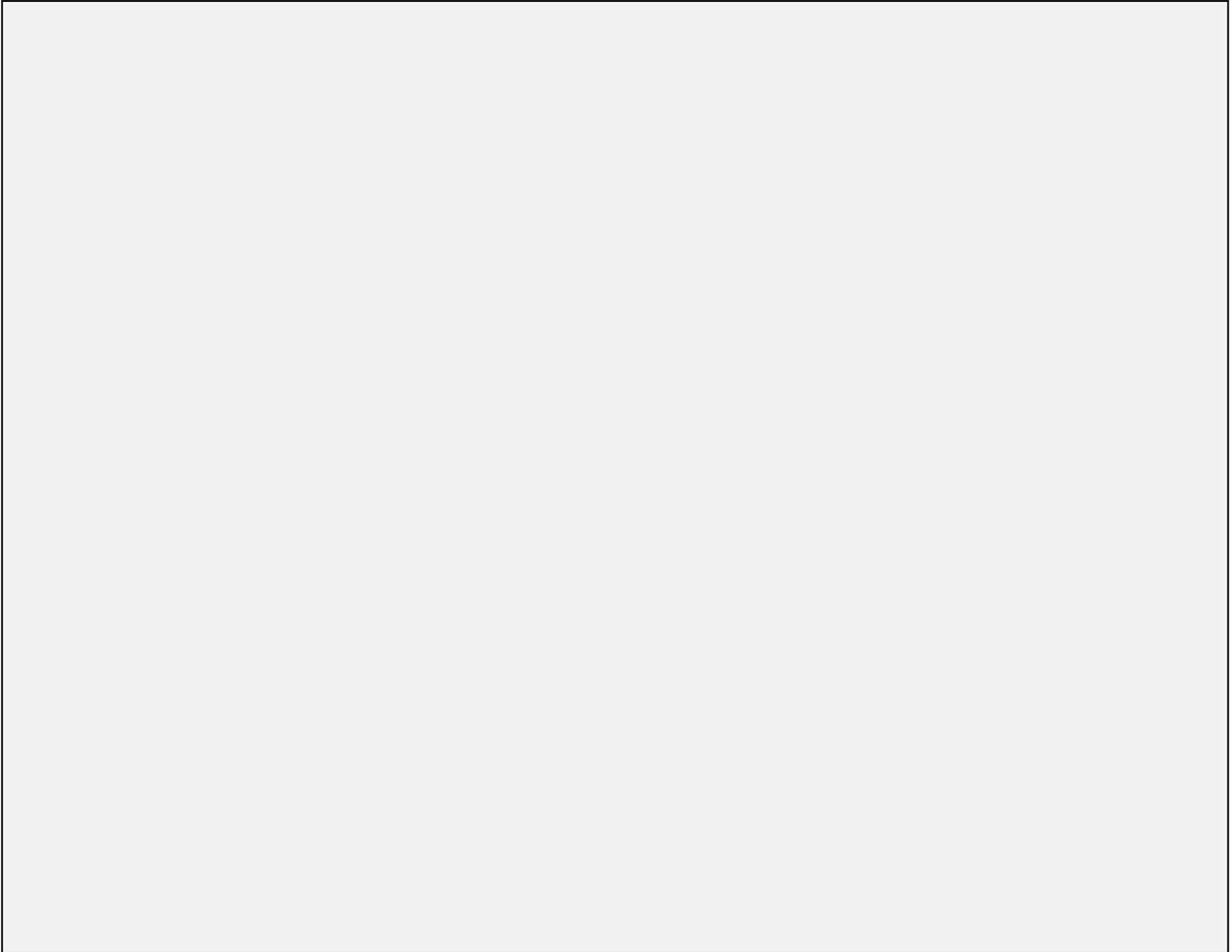
3C: Ability Statements

#	Ability Statement	Importance	Needed at Entry	Distinguishing Value
1		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
9		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
10		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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3D: Additional Statements and Comments

Please provide any additional comments for review regarding KSAs.



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SECTION 4: MINIMUM QUALIFICATIONS

4A: Education

Check the education that is minimally required to perform the job:

- | | |
|--|--|
| <input type="checkbox"/> Less than High School | <input type="checkbox"/> Bachelor's Degree (Undergraduate) |
| <input type="checkbox"/> High School Diploma or Equivalent (GED) | <input type="checkbox"/> Graduate Degree |
| <input type="checkbox"/> Technical School | <input type="checkbox"/> Doctorate Degree |
| <input type="checkbox"/> Associate Degree | |

4B: Experience

Check the years of experience that is needed to proficiently perform the job:

- | | |
|---|---|
| <input type="checkbox"/> No experience needed | <input type="checkbox"/> 3 years |
| <input type="checkbox"/> 6 months or less | <input type="checkbox"/> 4 years |
| <input type="checkbox"/> 1 year | |
| <input type="checkbox"/> 2 years | <input type="checkbox"/> Other: <input type="text"/> (enter length of time and specify months/year) |

4C: Additional Education or Experience

Describe any specific education and/or previous work experience required to perform the job. (For example, what type of background would you expect a successful job applicant to have?)

4D: Licenses & Certifications

1. Does the job require a Driver's License?

- YES NO

If yes, specify type:

2. Please list any other licenses or certificates required by law or your employer to perform your job.

#	License or Certificate	Required by:	
		Law	Employer
1		<input type="checkbox"/>	<input type="checkbox"/>

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#	License or Certificate	Required by:	
		Law	Employer
2		<input type="checkbox"/>	<input type="checkbox"/>
3		<input type="checkbox"/>	<input type="checkbox"/>

4E: Equipment Used

List electronic equipment, software, machines, tools, instruments, equipment, protective or vehicles used in performing the essential duties of the job. Give the percent of time spent in use or operation for each.

#	Equipment	% of Time	#	Equipment	% of Time
1			4		
2			5		
3			6		

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SECTION 5: IMPACT AND SCOPE

5A: Work Products

List services and/or any work products directly generated as a result of the tasks and duties performed (e.g., policies, guidelines, budgets, reports, letters, memos, computer-generated printouts, profit and loss statements, etc.). List the receiver of each of these services/work products.

#	Services/Work Product(s)	Receiver(s)
1		
2		
3		
4		
5		

5B: Boards, Commissions, and/or Standing Committees

List Boards, Commissions, and/or Standing Committees assigned as part of the duties of the position and indicate the participatory role by checking the appropriate box.

#	Board / Commission / Committee	Receiver(s)			
		Chair	Member	Executive Officer	Staff Support
1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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#	Board / Commission / Committee	Receiver(s)			
		Chair	Member	Executive Officer	Staff Support
3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5C: Internal Contacts

List persons within the organization, other than the direct supervisor and any direct subordinates, with whom there is regular contact while performing the duties of the position. Briefly describe the purpose (for example, to exchange information, make recommendations, make decisions, resolve conflicts) for these contacts and the frequency of their occurrence (e.g. daily, weekly, monthly, quarterly, annually).

#	Internal Contact(s)	Purpose(s)	Frequency
1			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
2			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
3			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
4			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
5			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly

5D: External Contacts

List the contacts regularly made with persons who are external to the organization while performing the duties of the position. Describe the purpose (for example, to exchange information, make recommendations, make decisions, resolve conflicts) of those contacts and the frequency of their occurrence (e.g. daily, weekly, monthly, quarterly, annually).

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#	External Contact(s)	Purpose(s)	Frequency
1			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
2			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
3			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
4			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
5			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly

Attachment B

SECTION 6: SUPERVISION/DIRECTION

6A: Supervision/Direction Received

1. Please select **one** of the following types and amount of supervision that best describes the type and amount of supervision that the position receives (even if already described above).

- Supervisor frequently checks job activities.
- Works alone on routine or regular work assignments and checks with supervisor on non-routine assignments or when in doubt as to the correct procedures to follow.
- Receives occasional supervision while working toward a definite objective that requires use of a wide range of procedures. Plans and/or determines specific procedures or equipment required to meet assigned objectives and solves non-routine problems. Refers only unusual matters to supervisor.
- Works from broad policies and towards general objectives. Refers specific matters to superior(s) only when interpretation or clarification of organizational policies is necessary.
- Works from general directives or broadly defined missions of the organization.

2. From whom are work assignments received?

#	Work Assignment(s)	Assigned By	Title
1			
2			
3			
4			
5			

3. How is work checked in order to discover/eliminate errors?

Attachment B

6B: Supervision/Direction Given

1. Does the position directly supervise employees?

YES NO

Indicate the total number of employees supervised directly:

and indirectly:

2. Does position perform "Lead" duties?

(Lead duties generally include providing training and/or ongoing guidance to staff; assigning and monitoring work; and assisting in providing information to the supervisor in areas such as employee selection, performance evaluations, and coverage schedules. Lead workers are typically not responsible for hiring/firing, corrective action, or preparing performance evaluations though they may provide input for the evaluations.)

YES NO

3. List the employees directly supervised or lead (include name, classification, and status). If position supervises or leads more than ten employees, list only the job titles and number of people supervised:

Status

- FTE = Full-Time Employee
- PTE = Part-Time Career or Part-Time Contract Employee (seasonal/intermittent)
- TEMP = Temporary or Contract Employee

#	Job Title	Name(s)	# FTE	# PT/TEMP
1				
2				

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#	Job Title	Name(s)	# FTE	# PT/TEMP
3				
4				
5				

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4. **What type of supervision/lead is provided?** Please select all of the supervisory/lead duties performed, the level of authority, and indicate whether the activity is performed for employees, non-employees (e.g. contractors), or both.

Duty	No Authority	Recommend	With Prior Approval	On Own Authority	Employee or Non-Employee
Train others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Hire employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Plan and/or schedule work for others on specific projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Plan and/or schedule work for others on a daily basis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assign or delegate work to others on specific projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assign or delegate work to others on a daily basis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Monitor work of others on specific projects or on a daily basis (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish rules, procedures, and/or standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Approve overtime and/or leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Evaluate performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Take corrective action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Resolve complaints and/or grievances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Attachment B

SECTION 7: AUTHORITY

1. Check the box which most closely describes the level of discretion and independent judgment that correlates to the level of authority assigned to the position for each listed work activity. Where there are options listed for organization/department/division/section, please circle the level within the organization for which the authority and/or independent judgment is exercised.

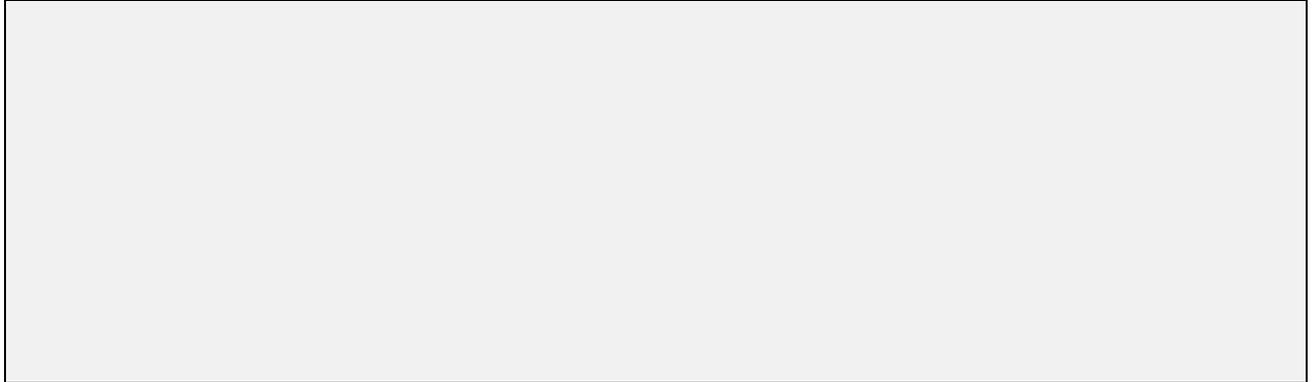
Work Activity	No Authority	Recommend	Within Prescribed Guidelines	On Own Authority	Frequency (Daily, Weekly, Monthly)
Determine long-term strategic planning objectives for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Determine and develop policies and procedures for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Change/re-direct policies and procedures for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Implement policies and procedures for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Determine and develop goals and objectives for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Implement goals and objectives for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Acquire resources needed to accomplish goals and objectives for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish and organize work priorities and processes for own position	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish and organize work priorities and processes for other positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish operational and/or capital budget amounts for organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Annual budget amount:					
Authorized expenditure level per occurrence assigned to your position:					
Manage/administer operational and/or capital budget amounts for organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Annual budget amount:					
Authorized expenditure level per occurrence assigned to your position:					
Monitor operational and/or capital budget amounts for organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Annual budget amount:					
Authorized expenditure level per occurrence assigned to your position:					

Attachment B

2. **Authority:** What level of authority does the position have to ensure compliance with laws, codes, and standards?

For example:

- The position can halt construction work if work is found to be out of compliance with standards.
- The position issues warnings to residents. After two warnings, the position initiates legal action by...
- The position arrests individuals breaking the law.



What corrective action is taken if noncompliance or substandard conditions are detected? What options are available?



Attachment B

3. **Budget:** Are there any duties and responsibilities in the organization budget process (e.g., plan, model, prepare, review, monitor, approve, etc.)?

YES NO

If yes, describe the duties and responsibilities below:

Amount of operating budget for which the position is responsible, if any:

4. **Project budgets:** Are there any capital budget responsibilities (e.g. plan, prepare, monitor, approve, etc.)?

YES NO

#	Project Title	Roles/Duties	Project Amount (\$)
1			
2			
3			
4			
5			

Attachment B

SECTION 8: ESSENTIAL FUNCTIONS – ADA

Physical Requirements

Please review the definitions and check the box that indicates how often you perform each physical requirement listed.

Frequency: This factor considers the frequency in which the physical requirements are performed as part of the essential functions of the job.

Rarely: once or twice, or never

Seldom: quarterly to yearly basis

Occasionally: monthly/bi-monthly basis

Frequently: weekly basis

A few times per day: 1-4 times per day

Several times per day: 5+ times per day

Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
CLIMBING: Ascends or descends ladders, stairs, scaffolding, ramps, poles, etc. using feet and legs and/or hands and arms	<input type="checkbox"/>					
STOOPING: Bends body downward and forward by bending spine at waist	<input type="checkbox"/>					
KNEELING: Bends legs at knee; comes to rest on a knee or knees	<input type="checkbox"/>					
CROUCH: Bends body downward and forward by bending leg and spine	<input type="checkbox"/>					
CRAWLING: Moves about on hands and knees or hands and feet	<input type="checkbox"/>					
REACHING: Extends hand(s) and arm(s) in any direction	<input type="checkbox"/>					
STANDING: Stands for long periods of time	<input type="checkbox"/>					
WALKING: Moves about on feet	<input type="checkbox"/>					
SITTING: Sits for extended periods of time	<input type="checkbox"/>					
PUSHING: Uses upper extremities to press against something with steady force to thrust object forward, downward or outward	<input type="checkbox"/>					
PULLING: Uses upper extremities to exert force to draw, drag, haul or tug objects in a sustained motion	<input type="checkbox"/>					
FINGER DEXTERITY: Picks, pinches, types, or otherwise primarily works with fingers rather than the whole hand or arm	<input type="checkbox"/>					

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Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
GRASPING: Applies pressure to an object with the fingers and palm	<input type="checkbox"/>					
FEELING: Perceives attributes of objects, such as size, shape, temperature, texture, by touching with skin, particularly that of fingertips	<input type="checkbox"/>					
TALKING: Expresses or exchanges ideas by means of the spoken word	<input type="checkbox"/>					
HEARING: Receives detailed information through oral communication	<input type="checkbox"/>					
BALANCING: Maintains body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces (Exceeds that needed for ordinary locomotion and maintenance of body equilibrium)	<input type="checkbox"/>					

Visual Requirements

Check the box that indicates how often you perform each requirement listed.

Frequency: This factor considers the frequency in which the visual requirements are performed as part of the essential functions of the job.

Rarely: once or twice, or never

Seldom: quarterly to yearly basis

Occasionally: monthly/bi-monthly basis

Frequently: weekly basis

A few times per day: 1-4 times per day

Several times per day: 5+ times per day

Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
Work performed requires the ability to see distances under 12 inches	<input type="checkbox"/>					
Work performed requires the ability to see at an arm's length	<input type="checkbox"/>					
Work performed requires the ability to see distances over 20 feet	<input type="checkbox"/>					
Work performed requires the use of both eyes (field of vision)	<input type="checkbox"/>					

Attachment B

Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
Work performed requires the ability to distinguish basic colors	<input type="checkbox"/>					
Work performed requires the ability to distinguish shades of colors	<input type="checkbox"/>					
Work performed requires depth perception	<input type="checkbox"/>					

Other Functional Requirements

Check the box that indicates how often you perform each requirement listed.

Frequency: This factor considers the frequency of other functional requirements are performed as part of the essential functions of the job.

Rarely: once or twice, or never

Seldom: quarterly to yearly basis

Occasionally: monthly/bi-monthly basis

Frequently: weekly basis

A few times per day: 1-4 times per day

Several times per day: 5+ times per day

Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
Operates truck, tractor, motor vehicle, forklift, or other moving equipment	<input type="checkbox"/>					
Repetitive use of foot control: <input type="checkbox"/> Right only <input type="checkbox"/> Left only <input type="checkbox"/> Both	<input type="checkbox"/>					
Repetitive use of hands: <input type="checkbox"/> Right only <input type="checkbox"/> Left only <input type="checkbox"/> Both	<input type="checkbox"/>					

Attachment B

SECTION 9: STATEMENTS

9A: Employee's Statement

EMPLOYEE'S STATEMENT

If there are other aspects of your job not covered in this questionnaire that are important in understanding your job content, please describe below. You may also attach additional information or pages if needed. This includes any previous PDQs or job-related documents.

By checking this box, I certify that I am the individual named below who has completed this questionnaire.

Printed Name:

Date:

Classification Title:

If a group PDQ, please have all additional respondents sign.

Full Name	Signature

You have completed the employee section of the Classification Questionnaire.

Please send to your immediate supervisor for review by **Friday, September 21, 2018.**

Thank you for your participation!

Attachment B

NEXT LEVEL SUPERVISOR STATEMENT

9B: Supervisor Statement

After reviewing this employee's questionnaire carefully to see that it is accurate and complete, please fill out Items 1-8 below.

Do not fill in these items unless you supervise the employee directly. Your certification below means that you accept responsibility for the accuracy and completeness with which the entire questionnaire describes the duties and responsibility of the job.

If the Employee's Statement does not express your view of the duties, responsibilities and essential functions that you have assigned the employee, please clarify or elaborate below. **Please allow your employees to review your responses if they request to see them.**

There are two essential cautions you should observe:

- **Under no circumstances** should the employee's entries in the Employee's Statement section be altered.
- Do not make any statements or comments about the employee's work performance, competence, or qualifications. This questionnaire will be used to evaluate the duties that constitute the **position**, not the performance or qualifications of the **employee**.

1. Does the **job summary/definition** of the classification accurately reflect the general responsibilities and work performed by this classification? If not, please clarify.

2. Do you agree with the **essential tasks** and the ratings provided by the employee? If not, please clarify.

3. Do you agree with **education/experience** statement? If not, please clarify.

4. Do you agree with **licenses/certification** statement? If not, please clarify.

Attachment B

5. Do you agree with the **impact and scope** as described by the employee? If not, please clarify.

6. Do you agree with the **supervision given/received** as described by the employee? If not, please clarify.

7. What additional information should be considered in evaluating the appropriate classification for this position?

8. Is reorganization or other changes planned or taking place in your organization that will impact the content or level of this job?

By checking this box, I certify that I supervise the employee who has completed this questionnaire.

Printed Name:

Classification Title:

Signature:

Date:

You have completed the next level supervisor section of the Classification Questionnaire.

Please send to your Manager for review by **Friday, September 28, 2018.**

Thank you for your participation!

Attachment B

MANAGER STATEMENT

9C: Manager Statement

After reviewing this employee's questionnaire carefully to see that it is accurate and complete, please complete the items below.

Do not fill in these items unless you are the applicable manager to the incumbent/classification. Your certification below means that you accept responsibility for the accuracy and completeness with which the entire questionnaire describes the duties and responsibility of the job.

If the Employee's Statement does not express your view of the duties, responsibilities and essential functions that you have assigned the employee, please clarify or elaborate below.

There are two essential cautions you should observe:

- **Under no circumstances** should the employee's entries in the Employee's Statement section be altered.
- Do not make any statements or comments about the employee's work performance, competence, or qualifications. This questionnaire will be used to evaluate the duties that constitute the **position**, not the performance or qualifications of the **employee**.

After you have reviewed this questionnaire and completed this page, please save this document and send to **Angela Aiken in Human Resources by Friday, October 1, 2018.**

Do you agree with the information given by the employee?

YES NO

If not, please clarify:

Printed Name:

Signature:

Classification Title:

Date:

**Appendix C: Position Allocation
Recommendations Sorted by Incumbent Name**

Attachment B

Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Abundez Camacho, Luis A	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Alcorn, Holly	Senior Accounting Technician	Accounting Technician II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Alvarez-Castillo, Cesar	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Arias, Esmeralda	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Ayres, Chrystal L	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Ballesteros, Ivan	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Barnes, Scott	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	Group	Maintain and retitle
Bauer, Donna	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
Bayer, Lorraine	Accountant II	Accountant II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Berrelleza, Pablo D	Transit Supervisor	Transit Supervisor	Yes	Group	Maintain
Bibriesca, Eduardo	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Blight, Karen J	Administrative Assistant	Administrative Assistant	Yes	Yes	Maintain
Brown, Ernest L	Lead Custodian (Custodial Coord)	Custodial Supervisor	Yes	Yes	Reclassify to new class based on preponderant duties
Brubeck, Delee	Personnel Technician	Human Resources Technician	Yes	Yes	Maintain and retitle
Bushnell, Ron	Transit Supervisor	Transit Supervisor	Yes	No	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Bytheway, Mary E	Accounting Specialist	Accounting Technician Specialist	Yes	No	Maintain and retitle
Castillo, Antonio T	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
Castillo, Juan V	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Castillo, Vincent	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Cawaling, George T	Receiving Parts Clerk	Stock Clerk	Yes	No	Reclassify based on preponderant duties
Chavarria, Tarquino C	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Crane, Sara M	Administrative Specialist	Accounting Technician II	Yes	Yes	Reclassify based on preponderant duties; actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Cummins, Edward G	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
Currea, Julio	Mechanic III	Mechanic III	Yes	Group	Maintain
Daugherty, A. J	Accessible Services Coordinator	Accessible Services Coordinator	Yes	Yes	Maintain
Delfin, Flor Monik	Human Resources Generalist	Human Resources Analyst	Yes	No	Maintain and retitle
Diaz, Edward M	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Estrada, Uriel	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
Eusse-Gil, Andrea	Schedule Analyst	Scheduling Specialist	Yes	Yes	Maintain and retitle
Favela, Javier	Vehicle Service Technician	Senior Vehicle Service Worker	Yes	No	Maintain and retitle
Fischer, Jennifer	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
Fonseca, Adela N	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Forshner-Jensen, Heather	Customer Service Coordinator	Customer Service Supervisor	Yes	Group	Reclassify to new class based on preponderant duties

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Gallet, Mary R	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Garcia, Antonio Z	Vehicle Service Worker I	Vehicle Service Worker I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Gastelum, Juan G	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Guerrero, Teodoro	Vehicle Service Detailer	Vehicle Service Detailer	Yes	No	Maintain
Guild, Wesley I	Electronic Technician	Electronic Technician	Yes	No	Maintain
Hernandez, Efrain U	Vehicle Service Worker II	Vehicle Service Worker II	Yes	Group	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Hernandez, Jaime	Mechanic III	Mechanic III	Yes	No	Maintain
Hernandez, Maria P	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Hernandez, Victor A	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Hill, Cayla	Planning Analyst	Planning Data Analyst	Yes	No	Maintain and retitle
Hiltner, Thomas M	Grants/Legislative Analyst	Grants/Legislative Analyst	Yes	No	Maintain
Howard, Sandra D	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Iriguchi, Lucas	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	Group	Maintain and retitle
Jeffries, Joan	Administrative Specialist	Administrative Specialist	Yes	No	Maintain
Kane, Chris	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Kegley, Rickie-Ann	Paralegal with HR Duties	Senior Paralegal	Yes	No	Maintain and retitle
Lam, Brian C	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	No	Maintain and retitle

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Legorreta, Pete N	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Leonard, Christopher R	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
LoGiudice, Jason A	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
MacDonell, Ryan	Lead Parts Clerk - FM	Senior Stock Clerk	Yes	No	Maintain and retitle
Madrigal, Manuel	Vehicle Service Worker I	Vehicle Service Worker I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Marquez, Raymundo D	Vehicle Service Detailer	Vehicle Service Detailer	Yes	No	Maintain
Martin, Dawn	Senior Accounting Technician	Accounting Technician II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Martin, Melody	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Martinez Lucio, Freddie	Payroll Specialist	Payroll Technician	Yes	No	Maintain and retitle
Mata, Joseph G	Upholsterer II	Upholsterer II	Yes	Yes	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Mayweather, Anson B	Ticket and Pass Program Specialist	Ticket and Pass Program Specialist	Yes	No	Maintain
Mendoza, Marisela M	Vehicle Service Worker II	Vehicle Service Worker II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Mendoza, Maritza L	Administrative Assistant Supervisor	Administrative Supervisor	Yes	No	Maintain and retitle
Mihaylova, Kristina	Senior Financial Analyst	Financial Analyst II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Misenheimer, Nathan L	Parts Clerk	Stock Clerk	Yes	No	Maintain and retitle
Moreno, Tomas	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Nevin, John C	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Ng, Jane	Senior Information Technology Technician	Information Technology Technician II	Yes	Yes	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Nolen, Greg	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
Olander, Joy J	Senior Payroll Specialist	Senior Payroll Technician	Yes	No	Maintain and retitle
Pena, Leonardo	Safety and Training Coordinator	Safety and Training Coordinator	Yes	No	Maintain
Perez, Christopher D	Mechanic I	Mechanic I	Yes	Group	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Perez, Eric	Vehicle Service Worker II	Vehicle Service Worker II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Pyka, Matthew	Transit Supervisor	Transit Supervisor	Yes	No	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Rasmussen, Peter	Transportation Planner	Transportation Planner II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Raygoza-Ramirez, Jose	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rios, Michael	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Rocha, Dario	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rocha, Luis A	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rodriguez, Ezequiel	Facilities Maintenance Worker I	Facilities Maintenance Assistant	Yes	No	Maintain and retitle
Rubio, Benjamin T	Customer Service Coordinator	Customer Service Supervisor	Yes	Group	Reclassify to new class based on preponderant duties
Sanchez, Lupe	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Sandoval, Sasha G	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Seda, Delvis F	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Solorio, Rina	Purchasing Assistant	Purchasing Technician	Yes	No	Maintain and retitle
Szestowicki, Thomas	Safety Specialist	Safety Program Specialist I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Thompson, Elizabeth	Transit Supervisor	Transit Supervisor	Yes	Group	Maintain
Thorn, Michael	Mechanic II	Mechanic II	Yes	Group	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Torres, Elmer	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	No	Maintain and retitle
Valdez, David	Vehicle Service Technician	Senior Vehicle Service Worker	Yes	No	Maintain and retitle
Vascones, Jordan	System Administrator	Systems Administrator I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Vasquez, Catalino S	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Vasquez, Cristobal R	Facilities Maintenance Worker I	Facilities Maintenance Assistant	Yes	No	Maintain and retitle
Villarruel Tavares, Juan M	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Wagley, Eileen	Paratransit Eligibility Coordinator	Paratransit Eligibility Coordinator	Yes	No	Maintain
Willis, Gregory A	Supervisor/Parts and Materials - FM	Parts and Materials Supervisor	Yes	Yes	Maintain and retitle
Willis, Robert S	Facilities Maintenance Supervisor	Facilities Maintenance Supervisor	Yes	No	Maintain
Woliczko, Stefan T	Senior Facilities Maintenance Worker	Senior Facilities Maintenance Worker	Yes	Yes	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Zamarripa, Jose D	Vehicle Service Worker II	Vehicle Service Worker II	Yes	Group	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Zenteno, Daniel P	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
ZZZ-VACANT	Account Clerk	Accounting Clerk	Yes	No	Maintain and retitle
ZZZ-VACANT	Accounting Technician	Accounting Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Accounting Technician	Accounting Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
ZZZ-VACANT	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
ZZZ-VACANT	Administrative Assistant Supervisor	Administrative Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Administrative Clerk I	Administratve Clerk	Yes	No	Maintain and retitle
ZZZ-VACANT	Administrative Specialist	Administrative Specialist	Yes	No	Maintain
ZZZ-VACANT	Assistant Safety and Training Coord	Safety and Training Instructor	Yes	No	Maintain and retitle
ZZZ-VACANT	Benefits Administrator	Benefits Technician	Yes	No	Maintain and retitle
ZZZ-VACANT	Body Shop Repair Mechanic	Vehicle Body Repair Mechanic	Yes	No	Maintain and retitle
ZZZ-VACANT	Claims Investigator I	Claims Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Claims Investigator II	Claims Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
ZZZ-VACANT	Custodial Service Worker II	Senior Custodial Service Worker	Yes	No	Maintain and retitle
ZZZ-VACANT	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
ZZZ-VACANT	Financial Analyst	Financial Analyst I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
ZZZ-VACANT	Human Resources Clerk	Human Resources Clerk	Yes	No	Maintain
ZZZ-VACANT	Human Resources Specialist	Human Resources Specialist	Yes	No	Maintain
ZZZ-VACANT	Junior Transportation Planner	Transportation Planner I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Legal Secretary	Legal Secretary	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
ZZZ-VACANT	Paralegal	Paralegal	Yes	No	Maintain
ZZZ-VACANT	Purchasing Agent	Purchasing Agent	Yes	No	Maintain
ZZZ-VACANT	Revenue Specialist	Revenue Collection Clerk	Yes	No	Maintain and retitle
ZZZ-VACANT	Senior Safety Specialist	Safety Program Specialist I/II	No	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Senior Transportation Planner	Senior Transportation Planner	Yes	No	Maintain
ZZZ-VACANT	Supervising Accountant	Accountant Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Supervisor of Revenue Collection	Revenue Collection Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Transit Surveyor	Planning Program Aide	Yes	No	Maintain and retitle
ZZZ-VACANT	Transportation Planning Aide	Transportation Planner I/II	Yes	No	Reclassify based on preponderant duties; recommend flexible allocation (I/II)

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
ZZZ-VACANT	Transportation Planning Supervisor	Transportation Planning Supervisor	Yes	No	Maintain
ZZZ-VACANT	Upholsterer I	Upholsterer I/II	Yes	No	Maintain and retitle; recommend flexible allocation (I/II)

**Appendix D: Position Allocation
Recommendations Sorted by Current Class**

Attachment B

Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Daugherty, A. J	Accessible Services Coordinator	Accessible Services Coordinator	Yes	Yes	Maintain
ZZZ-VACANT	Account Clerk	Accounting Clerk	Yes	No	Maintain and retitle
Bayer, Lorraine	Accountant II	Accountant II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Bytheway, Mary E	Accounting Specialist	Accounting Technician Specialist	Yes	No	Maintain and retitle
ZZZ-VACANT	Accounting Technician	Accounting Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Accounting Technician	Accounting Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Bauer, Donna	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
Blight, Karen J	Administrative Assistant	Administrative Assistant	Yes	Yes	Maintain
Fischer, Jennifer	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
ZZZ-VACANT	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
ZZZ-VACANT	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
Mendoza, Maritza L	Administrative Assistant Supervisor	Administrative Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Administrative Assistant Supervisor	Administrative Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Administrative Clerk I	Administrative Clerk	Yes	No	Maintain and retitle
Crane, Sara M	Administrative Specialist	Accounting Technician II	Yes	Yes	Reclassify based on preponderant duties; actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Jeffries, Joan	Administrative Specialist	Administrative Specialist	Yes	No	Maintain
ZZZ-VACANT	Administrative Specialist	Administrative Specialist	Yes	No	Maintain

Attachment B

Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
ZZZ-VACANT	Assistant Safety and Training Coord	Safety and Training Instructor	Yes	No	Maintain and retitle
ZZZ-VACANT	Benefits Administrator	Benefits Technician	Yes	No	Maintain and retitle
ZZZ-VACANT	Body Shop Repair Mechanic	Vehicle Body Repair Mechanic	Yes	No	Maintain and retitle
ZZZ-VACANT	Claims Investigator I	Claims Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Claims Investigator II	Claims Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Abundez Camacho, Luis A	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Castillo, Vincent	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Chavarria, Tarquino C	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Gastelum, Juan G	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Kane, Chris	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Moreno, Tomas	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
ZZZ-VACANT	Custodial Service Worker II	Senior Custodial Service Worker	Yes	No	Maintain and retitle
Forshner-Jensen, Heather	Customer Service Coordinator	Customer Service Supervisor	Yes	Group	Reclassify to new class based on preponderant duties
Rubio, Benjamin T	Customer Service Coordinator	Customer Service Supervisor	Yes	Group	Reclassify to new class based on preponderant duties
Arias, Esmeralda	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Fonseca, Adela N	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Gallet, Mary R	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Hernandez, Maria P	Customer Service Representative	Customer Service Representative	Yes	No	Maintain

Attachment B

Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Hernandez, Victor A	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Howard, Sandra D	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Martin, Melody	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Sanchez, Lupe	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Sandoval, Sasha G	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
ZZZ-VACANT	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Guild, Wesley I	Electronic Technician	Electronic Technician	Yes	No	Maintain
Willis, Robert S	Facilities Maintenance Supervisor	Facilities Maintenance Supervisor	Yes	No	Maintain
Rodriguez, Ezequiel	Facilities Maintenance Worker I	Facilities Maintenance Assistant	Yes	No	Maintain and retitle
Vasquez, Cristobal R	Facilities Maintenance Worker I	Facilities Maintenance Assistant	Yes	No	Maintain and retitle
Barnes, Scott	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	Group	Maintain and retitle
Iriguchi, Lucas	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	Group	Maintain and retitle
Lam, Brian C	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	No	Maintain and retitle
Torres, Elmer	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	No	Maintain and retitle
ZZZ-VACANT	Financial Analyst	Financial Analyst I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Castillo, Antonio T	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain

Attachment B

Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Nolen, Greg	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
ZZZ-VACANT	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
Hiltner, Thomas M	Grants/Legislative Analyst	Grants/Legislative Analyst	Yes	No	Maintain
ZZZ-VACANT	Human Resources Clerk	Human Resources Clerk	Yes	No	Maintain
Delfin, Flor Monik	Human Resources Generalist	Human Resources Analyst	Yes	No	Maintain and retitle
ZZZ-VACANT	Human Resources Specialist	Human Resources Specialist	Yes	No	Maintain
ZZZ-VACANT	Junior Transportation Planner	Transportation Planner I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Brown, Ernest L	Lead Custodian (Custodial Coord)	Custodial Supervisor	Yes	Yes	Reclassify to new class based on preponderant duties
Cummins, Edward G	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
Estrada, Uriel	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
LoGiudice, Jason A	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
MacDonell, Ryan	Lead Parts Clerk - FM	Senior Stock Clerk	Yes	No	Maintain and retitle
ZZZ-VACANT	Legal Secretary	Legal Secretary	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Alvarez-Castillo, Cesar	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Ballesteros, Ivan	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Diaz, Edward M	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Perez, Christopher D	Mechanic I	Mechanic I	Yes	Group	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Raygoza-Ramirez, Jose	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Villarruel Tavares, Juan M	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Zenteno, Daniel P	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Leonard, Christopher R	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rocha, Dario	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rocha, Luis A	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Thorn, Michael	Mechanic II	Mechanic II	Yes	Group	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Vasquez, Catalino S	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Currea, Julio	Mechanic III	Mechanic III	Yes	Group	Maintain
Hernandez, Jaime	Mechanic III	Mechanic III	Yes	No	Maintain
ZZZ-VACANT	Paralegal	Paralegal	Yes	No	Maintain
Kegley, Rickie-Ann	Paralegal with HR Duties	Senior Paralegal	Yes	No	Maintain and retitle
Wagley, Eileen	Paratransit Eligibility Coordinator	Paratransit Eligibility Coordinator	Yes	No	Maintain
Misenheimer, Nathan L	Parts Clerk	Stock Clerk	Yes	No	Maintain and retitle
Martinez Lucio, Freddie	Payroll Specialist	Payroll Technician	Yes	No	Maintain and retitle
Brubeck, Delee	Personnel Technician	Human Resources Technician	Yes	Yes	Maintain and retitle
Hill, Cayla	Planning Analyst	Planning Data Analyst	Yes	No	Maintain and retitle
ZZZ-VACANT	Purchasing Agent	Purchasing Agent	Yes	No	Maintain
Solorio, Rina	Purchasing Assistant	Purchasing Technician	Yes	No	Maintain and retitle
Cawaling, George T	Receiving Parts Clerk	Stock Clerk	Yes	No	Reclassify based on preponderant duties
ZZZ-VACANT	Revenue Specialist	Revenue Collection Clerk	Yes	No	Maintain and retitle
Pena, Leonardo	Safety and Training Coordinator	Safety and Training Coordinator	Yes	No	Maintain

Attachment B

Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Szestowicki, Thomas	Safety Specialist	Safety Program Specialist I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Eusse-Gil, Andrea	Schedule Analyst	Scheduling Specialist	Yes	Yes	Maintain and retitle
Alcorn, Holly	Senior Accounting Technician	Accounting Technician II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Martin, Dawn	Senior Accounting Technician	Accounting Technician II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Woliczko, Stefan T	Senior Facilities Maintenance Worker	Senior Facilities Maintenance Worker	Yes	Yes	Maintain
Mihaylova, Kristina	Senior Financial Analyst	Financial Analyst II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Ng, Jane	Senior Information Technology Technician	Information Technology Technician II	Yes	Yes	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Olander, Joy J	Senior Payroll Specialist	Senior Payroll Technician	Yes	No	Maintain and retitle
ZZZ-VACANT	Senior Safety Specialist	Safety Program Specialist I/II	No	No	Maintain and retitle ; recommend flexible allocation (I/II)

Attachment B

Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
ZZZ-VACANT	Senior Transportation Planner	Senior Transportation Planner	Yes	No	Maintain
ZZZ-VACANT	Supervising Accountant	Accountant Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Supervisor of Revenue Collection	Revenue Collection Supervisor	Yes	No	Maintain and retitle
Willis, Gregory A	Supervisor/Parts and Materials - FM	Parts and Materials Supervisor	Yes	Yes	Maintain and retitle
Vascones, Jordan	System Administrator	Systems Administrator I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Mayweather, Anson B	Ticket and Pass Program Specialist	Ticket and Pass Program Specialist	Yes	No	Maintain
Ayres, Chrystal L	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Berrelleza, Pablo D	Transit Supervisor	Transit Supervisor	Yes	Group	Maintain
Bibriesca, Eduardo	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Bushnell, Ron	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Castillo, Juan V	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Legorreta, Pete N	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Nevin, John C	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Pyka, Matthew	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Rios, Michael	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Seda, Delvis F	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Thompson, Elizabeth	Transit Supervisor	Transit Supervisor	Yes	Group	Maintain
ZZZ-VACANT	Transit Surveyor	Planning Program Aide	Yes	No	Maintain and retitle

Attachment B

Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Rasmussen, Peter	Transportation Planner	Transportation Planner II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
ZZZ-VACANT	Transportation Planning Aide	Transportation Planner I/II	Yes	No	Reclassify based on preponderant duties; recommend flexible allocation (I/II)
ZZZ-VACANT	Transportation Planning Supervisor	Transportation Planning Supervisor	Yes	No	Maintain
ZZZ-VACANT	Upholsterer I	Upholsterer I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Mata, Joseph G	Upholsterer II	Upholsterer II	Yes	Yes	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Guerrero, Teodoro	Vehicle Service Detailer	Vehicle Service Detailer	Yes	No	Maintain
Marquez, Raymundo D	Vehicle Service Detailer	Vehicle Service Detailer	Yes	No	Maintain
Favela, Javier	Vehicle Service Technician	Senior Vehicle Service Worker	Yes	No	Maintain and retitle
Valdez, David	Vehicle Service Technician	Senior Vehicle Service Worker	Yes	No	Maintain and retitle
Garcia, Antonio Z	Vehicle Service Worker I	Vehicle Service Worker I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Madrigal, Manuel	Vehicle Service Worker I	Vehicle Service Worker I	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Hernandez, Efrain U	Vehicle Service Worker II	Vehicle Service Worker II	Yes	Group	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Mendoza, Marisela M	Vehicle Service Worker II	Vehicle Service Worker II	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Perez, Eric	Vehicle Service Worker II	Vehicle Service Worker II	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Zamarripa, Jose D	Vehicle Service Worker II	Vehicle Service Worker II	Yes	Group	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy



Attachment C

Class Code: Class Code
FLSA Status: Pending

Accessible Services Coordinator **Bargaining Unit: SEA**

DEFINITION:

Under direction, an Accessible Services Coordinator performs program administrative and operations duties to assist the older adult and handicapped community utilize METRO paratransit and transit services; provides outreach and education to current and potential customers to encourage the use of METRO's accessible services; plans, coordinates, develops and implements METRO's Mobility Training Program; serves as a liaison and information source to customers, community agencies and the public regarding METRO accessibility services and Mobility Training; supports METRO management in ensuring that METRO's vehicles and services comply with Americans With Disabilities Act (ADA) requirements; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accessible Services Coordinator is a program coordinator level class. An incumbent in this class is primarily responsible for planning, developing, coordinating and providing METRO services to the older adult and disabled community, and for promoting such services through targeted community outreach and education.

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.

- Plans, develops, organizes and conducts services for the older adult and disabled community, ensuring their compliance with State and Federal requirements as well as METRO policies and procedures.
- Plans and implements METRO's Mobility Training Program; provides one-on-one and group mobility training and support services by teaching, demonstrating and assisting program participants and/or their supporters on the safe and proper use of the METRO bus system; meets with participants; plans and develops individualized training schedules; monitors trainee progress.
- Develops, distributes and/or modifies a variety of training procedures, methods, materials, and forms to facilitate the effective training of Mobility Training Program participants.
- Promotes and provides outreach services to the older adult and disabled communities; attends classrooms, events, and a variety of public or private meetings to present to individuals and organizations about METRO's accessibility services.
- Creates teaching materials and presents ADA-related training to METRO staff as assigned.
- Serves as a liaison and information source to customers, community agencies and the public with regard to METRO accessibility services and the Mobility Training Program.
- Works with METRO management to help ensure that METRO's vehicles and services comply with Americans With Disabilities Act (ADA) requirements.
- Reviews, investigates and responds to ADA complaints as assigned.
- Serves on committees, commissions and task forces as assigned.
- Updates and maintains information in a database; prepares regular and periodic reports for management as requested; maintains various logs, records, and lists.



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- Conducts research and prepares summaries of findings; initiates, composes and/or types various memos, letters, reports, statistical data, and other narrative documents; writes, updates and maintains program procedures.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax machine, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles of program organization, administration and coordination.
- Common transit agency policies and procedures associated with paratransit and standard bus operations.
- State, Federal, and local laws and regulations regarding the accessibility of transit services to the older adult and disabled community, including the Americans With Disabilities Act (ADA) and the principles guiding reasonable accommodation.
- Current practices, procedures, and philosophies pertaining to mobility training and accessibility.
- Special equipment, procedures, and opportunities available to improve the accessibility of transit services to underserved populations.
- Current instructional methods, and practices, as well as effective curriculum development.
- Customer safety and health-related considerations related to paratransit and transit services.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software, including audio/visual equipment.

Ability to:

- Plan, develop, organize and conduct an effective mobility training program for older adults and disabled individuals.
- Read and understand laws, regulations, and policies pertaining to transit accessibility.
- Conduct field work to provide direct services to customers.
- Teach ideas, concepts, and skills to older adult and disabled individuals effectively.
- Research, analyze and evaluate new teaching methods and techniques.
- Formulate specific objectives to compare and evaluate program results.
- Define problem areas and evaluate, recommend and implement alternative solutions to issues and problems.
- Instruct others in the safe utilization of METRO vehicles and services and adapt training procedures to the needs of the individual.



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- Act as liaison between METRO, community groups, other transit districts, transit customers, and the public with regard to accessible services.
- Develop and write plans, procedures, reports, forms, and tests.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 30 semester (or equivalent) college units, including coursework in business administration, public administration, social services or a related field.

AND

Four (4) years of experience in program, project or administrative support. Experience must have also included at least two (2) years of experience related to accessibility and/or ADA compliance.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 often required to reach with hands and arms; sit, push and pull; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist and crouch. Occasional lifting up to 20 pounds unaided may be required. 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; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.



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Work Environment:

The employee typically works in a standard office environment where the noise level is moderate. May work out in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Transit Operations



Attachment C

Class Code: Class Code
FLSA Status: Pending

Accountant I **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Accountant I performs a limited range of professional accounting duties related to METRO financial functions and processes; analyzes and reconciles accounting records in compliance with State and Federal laws, regulations and requirements; participates in the development of METRO accounting systems and sub-systems; learns to reconcile the General Ledger and various bank records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accountant I is the first working-level class in the series. An incumbent in this class performs a limited range of professional accounting duties while learning to perform the full scope of journey-level work. This class is distinguished from the higher-level class of Accountant II because an incumbent in the latter class performs the full scope of journey-level professional accounting work.

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.

- Performs professional operating and/or cost accounting work requiring the application of professional accounting principles to a wide variety of problems; learns to perform the full range of journey-level professional accounting work in an assigned department.
- Participates in the preparation of annual audited financial statements and notes; develops management discussion points and analysis in accordance with legal requirements.
- Participates in the annual actuarial valuation process in accordance with legal requirements.
- Reconciles the General Ledger (G/L); reconciles various bank accounts and bankcard activity; reconciles total payroll expense to payroll tax returns for audit purposes and analytics; analyzes and investigates variances; ensures proper coding of transactions.
- Participates in special accounting system development assignments, such as development of subsystems for recording of data necessary for control purposes.
- Participates in the development of METRO financial policies and procedures; provides training on new or updated procedures to Finance and other staff as needed.
- Analyzes budgetary, financial, actuarial and statistical data; makes recommendations on discount rates, funding options for pension-related liabilities, trends in contribution rates, fare revenues, and other subject matter.
- Maintains accounting records, depreciation schedules and assets purchased under Federal grants; posts accounts distribution for all revenue/grant receipts; documents grant funding sources for capital asset purchases.
- Prepares tax returns; compiles capital asset information.
- Calculates fixed asset depreciation amounts using appropriate depreciation schedules and processes.
- Analyzes expenditure data and determines reimbursements collected from the State or Federal governments.



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- Analyzes and investigates variances between actual and budgeted expenditures necessitating realignment of appropriations, encumbrances and/or payments to reflect proper cost accounting within budget constraints.
- Assists in preparing cost allocation plans utilizing appropriate cost accounting procedures; calculates indirect costs and allocates the costs to the appropriate departments, sections or projects as required.
- Participates in special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, forms and techniques of professional public sector accounting, finance and budgeting.
- Generally Accepted Accounting Principles (GAAP), and their application to a wide variety of accounting transactions, situations and problems.
- Laws and regulations applicable to public sector accounting.
- Principles and practices of public agency budgeting, revenue forecasting and investing.
- Business law principles and practices.
- Benefits and limitations of automated accounting applications.
- Relationships between accounting records and documents for recording and reporting purposes.
- Public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Perform a wide variety of complex, professional accounting tasks.
- Evaluate, interpret and apply accounting laws, regulations, policies, procedures and requirements to departmental financial activities.
- Perform professional accounting activities in compliance with applicable laws, regulations and policies.
- Maintain complex financial/statistical data and records.



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- Reconcile accounts and reconstruct record trails in order to locate and correct errors or reasons for imbalance.
- Apply professional accounting control procedures to maintain budgetary accounts.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in accounting, business administration or a related field, including coursework in elementary and advanced accounting, management accounting, business law and cost accounting.

AND

One (1) year of professional accounting experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.

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.



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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 typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Professional



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Class Code: Class Code
FLSA Status: Pending

Accountant II Bargaining Unit: SEA

DEFINITION:

Under direction, an Accountant II performs professional accounting duties to support METRO financial functions and processes; analyzes and reconciles accounting records for compliance with State and Federal laws, regulations and requirements; coordinates the development of METRO accounting systems and sub-systems; reconciles the General Ledger and various bank records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accountant II is the journey-level class in the series. An incumbent in this class performs the full range of professional accounting duties requiring the application of professional accounting principles to a wide variety of problems. This class may be distinguished from the lower-level class of Accountant I because an incumbent in the latter class performs a more limited range of duties while learning to perform the full scope of journey-level professional accounting work. This class may also be distinguished from the higher-level class of Accountant Supervisor because the latter is the first supervisory-level class in the series.

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.

- Coordinates and participates in the preparation of annual audited financial statements and notes; develops management discussion points and analysis in accordance with legal requirements.
- Coordinates and participates in the annual actuarial valuation process in accordance with legal requirements.
- Reconciles the General Ledger (G/L); reconciles various bank accounts and bankcard activity; reconciles total payroll expense to payroll tax returns for audit purposes and analytics; analyzes and investigates variances; ensures proper coding of transactions.
- Performs special accounting system development assignments, such as development of subsystems for recording of data necessary for control purposes.
- Develops and recommends METRO financial policies and procedures; provides training on new or updated procedures to Finance and other staff as needed.
- Analyzes budgetary, financial, actuarial and statistical data to make recommendations on discount rates, funding options for pension-related liabilities, trends in contribution rates, fare revenues, and other subject matter.
- Maintains accounting records, depreciation schedules and assets purchased under Federal grants; post accounts distribution for all revenue/grant receipts; documents grant funding source for capital asset purchases.
- Prepares tax returns; compiles capital asset information.
- Calculates fixed asset depreciation amounts using appropriate depreciation schedules and processes.
- Analyzes expenditure data and determines reimbursements collected from the State or Federal governments.



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- Analyzes and investigates variances between actual and budgeted expenditures necessitating realignment of appropriations, encumbrances and/or payments to reflect proper cost accounting within budget constraints.
- Assists in preparing cost allocation plans utilizing appropriate cost accounting procedures; calculates indirect costs and allocates the costs to the appropriate departments, sections or projects as required.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, forms and techniques of professional public sector accounting, finance and budgeting.
- Generally Accepted Accounting Principles (GAAP), and their application to a wide variety of accounting transactions, situations and problems.
- Laws and regulations applicable to public sector accounting.
- Principles and practices of public agency budgeting, revenue forecasting and investing.
- Business law principles and practices.
- Benefits and limitations of automated accounting applications.
- Relationships between accounting records and documents for recording and reporting purposes.
- Public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Perform a wide variety of complex, professional accounting tasks.
- Evaluate, interpret and apply accounting laws, regulations, policies, procedures and requirements to departmental financial activities.
- Perform professional accounting activities in compliance with applicable laws, regulations and policies.
- Maintain complex financial/statistical data and records.



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- Reconcile accounts and reconstruct record trails in order to locate and correct errors or reasons for imbalance.
- Apply professional accounting control procedures to maintain budgetary accounts.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in accounting, business administration or a related field, including coursework in elementary and advanced accounting, management accounting, business law and cost accounting.

AND

Three (3) years of professional accounting experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.

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.



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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 typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Professional



Attachment C

Class Code: Class Code
FLSA Status: Pending

Accountant Supervisor **Bargaining Unit: PSA**

DEFINITION:

Under direction, an Accountant Supervisor performs supervisory and advanced professional accounting duties related to METRO financial functions and processes; directs and supervises the analysis and reconciliation of accounting records for compliance with State and Federal laws, regulations and requirements; directs and supervises the development of METRO accounting systems and sub-systems; oversees the reconciliation of the General Ledger and various bank records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accountant Supervisor is the supervisory-level class in the series. An incumbent in this class performs supervisory and professional accounting work requiring the application of advanced professional accounting principles to a wide variety of problems. This class may be distinguished from the lower-level class of Accountant II because an incumbent in the latter class performs journey-level professional accounting work and does not supervise professional 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.

- Supervises subordinate professional accounting staff and may supervise technical, clerical or support staff; assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Supervises and participates in the preparation of annual audited financial statements, the development of management discussion points, and various accounting analyses in accordance with legal requirements.
- Supervises and participates in the annual actuarial valuation process in accordance with legal requirements.
- Supervises the reconciliation of the General Ledger (G/L) as well as various bank accounts and bankcard activity; oversees the reconciliation of total payroll expense to payroll tax returns for audit purposes and analytics; directs and participates in the analysis and investigation of variances and ensures proper coding of transactions.
- Supervises and performs special accounting system development assignments, such as development of subsystems for recording of data necessary for control purposes.
- Supervises the development and recommendation of METRO financial policies and procedures; provides training on new or updated procedures to Finance and other staff as needed.
- Analyzes budgetary, financial, actuarial and statistical data to make recommendations on discount rates, funding options for pension-related liabilities, trends in contribution rates, fare revenues, and other subject matter.
- Maintains accounting records, depreciation schedules and assets purchased under Federal grants; posts accounts distribution for all revenue/grant receipts; documents grant funding source for capital asset purchases.



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- Oversees the preparation of tax returns and the compilation of capital asset information.
- Calculates fixed asset depreciation amounts using appropriate depreciation schedules and processes.
- Analyzes expenditure data and determines reimbursements which can be collected from the State or Federal governments.
- Analyzes and investigates variances between actual and budgeted expenditures necessitating realignment of appropriations, encumbrances and/or payments to reflect proper cost accounting within budget constraints.
- Recommends cost allocation plans utilizing appropriate cost accounting procedures; calculates indirect costs and allocates the costs to the appropriate departments, sections or projects as required.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Advanced principles, practices, forms and techniques of professional public sector accounting, finance and budgeting.
- Generally Accepted Accounting Principles (GAAP), and their application to a wide variety of accounting transactions, situations and problems.
- Advanced laws and regulations applicable to public sector accounting.
- Principles and practices of public agency budgeting, revenue forecasting and investing.
- Business law principles and practices.
- Benefits and limitations of automated accounting applications.
- Relationships between accounting records and documents for recording and reporting purposes.
- Advanced public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:



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- Effectively supervise and motivate subordinate staff.
- Perform a wide variety of complex, professional accounting tasks.
- Evaluate, interpret and apply accounting laws, regulations, policies, procedures and requirements to departmental financial activities.
- Coordinate and perform professional accounting activities in compliance with applicable laws, regulations and policies.
- Maintain complex financial and statistical data and records.
- Reconcile accounts and reconstruct record trails in order to locate and correct errors or reasons for imbalance.
- Apply advanced professional accounting control procedures to maintain budgetary accounts.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in accounting, business administration or a related field, including coursework in elementary and advanced accounting, management accounting, business law and cost accounting.

AND

Four (4) years of professional accounting experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.



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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 typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Financial Professional



Attachment C

Class Code: Class Code
FLSA Status: Pending

Accounting Clerk Bargaining Unit: SEA

DEFINITION:

Under general supervision, an Accounting Clerk performs accounting duties to support department financial functions and processes; processes and maintains detailed financial records in computerized and hard copy files; gathers and compiles data for statistical or financial reports; provides information to employees and the public as authorized; types, files and performs general office work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accounting Clerk is a journey-level clerical class. An incumbent in this class performs clerical accounting tasks of average difficulty that require a basic knowledge of bookkeeping principles and methods as well as general departmental policies, practices and procedures. This class may be distinguished from the higher-level class of Accounting Technician I because an incumbent in the latter class learns and performs technical accounting work that requires advanced bookkeeping skills and some formal knowledge of public accounting principles and practices.

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.

- Performs data entry to update and maintain financial information in an established spreadsheet, database or other computerized files; compiles and prepares data for statistical and accounting reports; creates spreadsheets and other tools to track information.
- Tracks budget expenditures by cost center; prepares budget status reports and summaries for revenue, capital and operating expenditures.
- Accepts, records and processes payments from vendors for rents and services.
- Computes grant percentages on invoices as applicable.
- Organizes and maintains fixed asset inventory files; coordinates periodic fixed asset inventory surveys.
- Receives and processes routine financial documents, including invoices and bills; prepares payment authorizations, requisitions, and check requests.
- Maintains inventories and orders supplies.
- Types memoranda, letters, reports, contracts, purchase orders, statistical data, specifications, minutes, agendas, and other documents from draft as directed.
- Maintains and updates lists and files by inserting and extracting information; may handle confidential materials, records, files and other privileged information.
- Answers telephones, greets visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.



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EMPLOYMENT STANDARDS:

Knowledge of:

- Basic bookkeeping methods.
- Basic clerical processes pertaining to accounting, purchasing, and data maintenance.
- Modern office practices, procedures and equipment.
- Basic methods of maintaining information in computerized or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Maintain detailed records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Type finished copy from rough draft or machine transcription.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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 clerical experience requiring the operation of personal computers, data entry, typing and maintaining detailed records. Experience must have also included at least one (1) year of clerical accounting work.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Financial Clerical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Accounting Technician I **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Accounting Technician I performs a limited range of technical accounting duties to support department financial functions and processes while learning to perform the full-scope of journey-level technical accounting duties for an assigned department; compiles, verifies and summarizes financial and statistical data from a variety of sources; learns to process and maintain files and records for accounts payable, accounts receivable, cash receipts, fixed assets, insurance, revenue, general ledger, tax filings, and budgeting; gathers and compiles data for statistical or financial reports; reviews and processes payroll documents; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accounting Technician I is the first working-level class in the series. An incumbent in this class performs the less complex technical accounting tasks requiring interpretation and application of specialized accounting policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the lower-level class of Accounting Clerk because an incumbent in the latter class performs journey-level clerical accounting work. This class may also be distinguished from the higher-level class of Accounting Technician II because an incumbent in the latter class performs the full range of journey-level, technical accounting work.

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.

- Performs a limited range of technical accounting duties to support department financial functions and processes while learning to perform the full-scope of journey-level technical accounting duties for an assigned department.
- Administers a departmental financial record-keeping program; posts information to automated ledgers, account books, and accounting worksheets; reconciles manual records to computer-generated reports.
- Performs accounts payable duties; reviews and matches accounts payable documents such as invoices, receiving reports and purchase orders to support payment and reconcile discrepancies; reviews contracts, accounts, statements, or payments to confirm payment status, terms, pricing, and scope of work; routes payment documents for approval/signature; submits approved documents for payment.
- Tracks budget accounts and balances; monitors expenditures compared to budget allowances and notifies management if over-budget; reconciles transactions and account balances to Finance reports; reconciles departmental credit card and related charge accounts.
- Collects cash and receives, codes, processes and deposits cash receipts; reviews and processes petty cash reimbursements; enters cash receipts and other accounts receivable information into an automated accounting system and reconciles to reports; makes bank deposits; performs department petty cash and Ticket Vending Machine (TVM) audits.
- Monitors insurance policies for properties under contract with Santa Cruz METRO; tracks insurance expirations; researches contracts and leases to ensure that required endorsements are



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received and updated; reviews insurance expirations and prepares insurance billing statements for payment.

- Creates and submits a wide variety of purchase requisitions; works with vendors as needed to adjust purchase orders.
- Performs technical research relating to financial and other administrative activities; extracts and compiles data from manual and computerized sources for reports and other documents; makes computations and prepares statistical summaries and reports.
- Calculates and processes Treasury account transfers.
- Processes emergency check requests and prepares off-cycle checks.
- Reviews and processes employee attendance and payroll documents; may calculate and record hours worked, leave used, shift differentials, and other payroll provisions; researches and resolves payroll-related problems.
- Performs other technical duties in support of departmental administrative functions; researches a variety of issues and prepares summaries of findings; initiates, composes and/or prepares complex department memos, letters, reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records and documentation; maintains logs, spreadsheets, lists and files to track operational processes and information.
- Performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of technical accounting, including the processing of accounts payable and accounts receivable transactions and documents.
- Basic laws and regulations applicable to public sector accounting.
- Basic public sector accounting terminology and methods.
- Bookkeeping practices and procedures.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and financial data conventions.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:



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- Evaluate, interpret and apply technical accounting policies, procedures and requirements as they apply to departmental financial activities.
- Perform technical accounting activities in a manner that complies with applicable laws, regulations and policies.
- Check, balance and reconcile documents; maintain accounts payable/receivable and cash receipts.
- Apply control procedures pertaining to the maintenance of budgetary accounts.
- Maintain a variety of financial accounts, ledgers, and financial reports.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Completion of 30 semester (or equivalent quarter) units from an accredited college, including 12 units in accounting, business administration or a comparable field of coursework.

AND

Two (2) years of clerical accounting experience requiring the maintenance of computerized accounting records and the application of basic bookkeeping practices.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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



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stooping at the waist and the repetitive use of both hands to grasp and feel objects and. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Financial Clerical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Accounting Technician II **Bargaining Unit: SEA**

DEFINITION:

Under direction, an Accounting Technician II performs journey-level technical accounting duties to support department financial functions and processes; compiles, verifies and summarizes financial and statistical data from a variety of sources; processes and maintains files and records for accounts payable, accounts receivable, cash receipts, fixed assets, insurance, revenue, general ledger, tax filings, and budgeting; coordinates the review and processing of payroll documents; gathers and compiles data for statistical or financial reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accounting Technician II is a journey-level technical accounting class. An incumbent in this class performs tasks requiring interpretation and application of specialized accounting policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the lower-level class of Accounting Technician I because an incumbent in the latter class performs a limited range of technical accounting work while learning to perform the full range of journey-level duties. It may also be distinguished from the higher-level class of Accounting Technician Specialist because an incumbent in the latter class performs advanced technical accounting work and may serve as a lead worker over subordinate technical and/or clerical 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.

- Administers a departmental financial record-keeping program; posts information to automated ledgers, account books, and accounting worksheets; reconciles manual records to computer-generated reports.
- Performs accounts payable duties; reviews and matches accounts payable documents such as invoices, reports and purchase orders to support payment and reconcile discrepancies; reviews contracts, accounts, statements, or payments to confirm payment status, terms, pricing, and scope of work; routes payment documents for approval/signature; submits approved documents for payment.
- Tracks budget accounts and balances; monitors expenditures compared to budget allowances and notifies management if over-budget; reconciles transactions and account balances to Finance reports.
- Collects cash and receives, codes, processes and/or deposits cash receipts; reviews and processes petty cash reimbursements; enters cash receipt and other accounts receivable information into an automated accounting system and reconciles to reports; makes bank deposits.
- Coordinates and monitors insurance policies for properties under contract with Santa Cruz METRO; monitors insurance expirations; researches contracts and leases to ensure that required endorsements are received and updated; reviews insurance expirations and prepares insurance billing statements for payment.
- Creates and submits purchase requisitions; works with vendors as needed to adjust purchase orders.



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- Performs technical research related to financial and other administrative activities; extracts and compiles data from manual and computerized sources for reports and other documents; makes computations and prepares statistical summaries and reports.
- Performs department petty cash and Ticket Vending Machine (TVM) audits.
- Calculates and processes Treasury account transfers.
- Reconciles departmental credit card and related charge accounts.
- Processes emergency check requests and prepares off-cycle checks.
- Reviews and processes employee attendance and payroll documents; may calculate and record hours worked, leave used, shift differentials, and other payroll provisions; researches and resolves payroll-related problems.
- Develops and delivers technical training to various staff on accounts payable and budget tracking procedures.
- Performs other technical duties in support of departmental administrative functions; researches a variety of issues and prepares summaries of findings; initiates, composes and/or prepares complex department memos, letters, reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records and documentation; maintains logs, spreadsheets, lists and files to track operational processes and information.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of technical accounting, including the processing of accounts payable and accounts receivable transactions and documents.
- Basic laws and regulations applicable to public sector accounting.
- Basic public sector accounting terminology and methods.
- Advanced bookkeeping practices and procedures.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios and percentages.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:



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- Evaluate, interpret and apply technical accounting policies, procedures and requirements as they apply to departmental financial activities.
- Coordinate and perform technical accounting activities in a manner that complies with applicable laws, regulations and policies.
- Check, balance and reconcile documents; maintain accounts payable/receivable and cash receipts.
- Apply control procedures pertaining to the maintenance of budgetary accounts.
- Maintain a variety of financial accounts, ledgers, and financial reports.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Completion of 30 semester (or equivalent quarter) units from an accredited college, including 12 units in accounting, business administration or a comparable field of coursework.

AND

Two (2) years of experience requiring technical bookkeeping, financial recordkeeping, and/or accounts payable and receivable work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects and. Work may



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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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Financial Technical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Accounting Technician Specialist **Bargaining Unit: SEA**

DEFINITION:

Under direction, an Accounting Technician Specialist performs advanced technical accounting duties to support METRO financial functions and processes; maintains the General Ledger; performs difficult account reconciliations; prepares and maintains complex accounting records and reports; performs the more difficult accounts payable, accounts receivable, cash receipts, fixed assets, insurance, revenue, general ledger, tax filings, and budgeting activities; may serve as a lead worker over subordinate technical, clerical and support staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accounting Technician Specialist is the advanced-level class in the series. An incumbent in this class performs tasks requiring interpretation and application of specialized accounting policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the lower-level class of Accounting Technician II because an incumbent in the latter class performs the full range of journey-level technical accounting work. This class may also be distinguished from the higher-level class of Accountant I because the latter is the first professional-level accounting class.

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.

- Maintains the General Ledger (G/L); reconciles balance sheet accounts and documents and reconciles revenue and expense accounts; prepares, enters and posts journal entries into an automated accounting system; merges Accounts Receivable and Accounts Payable to flow into the G/L; closes month-end books and runs all reports including the final G/L and Financials; assists professional staff with year-end reporting and closing of accounting records.
- Reconciles the G/L cash balance to the County Treasurer's cash balance; determines and takes appropriate action to resolve variances; reconciles G/L accounts and the Accounts Payable bank balance by researching and resolving any outstanding checks that have not been cashed; reconciles the monthly check register for the Board of Director's report.
- Maintains all check journals; processes all returned checks and takes follow-up action as needed.
- Organizes, records, and retains the weekly bank deposit recaps from MetroCenter and resolves discrepancies as needed.
- Prepares all billings for tenants (utilities, pest control, late charges, etc.), advertising, unions, revenue, and other miscellaneous receivables as needed; prepares Consumer Price Index adjustments for revenue and tenant customers as needed and provides appropriate notification; collects late payments; runs monthly statements for Accounts Receivable.
- Balances all checks and cash to the receipts log for accuracy; contacts bank for Fares Sweep and writes checks; prepares affidavit and Record of Deposit from County as needed; maintains monthly record of all cash receipts and wire deposits; runs reports from the County Treasury website in accordance with established procedures; updates Board of Equalization sales tax wire information from website each month.



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- Maintains financial statements including consolidated and departmental reports for expenses and revenue.
- Assists in compiling financial data for projects as assigned; assists in the monetary petty cash count and safe contents count at MetroCenter; provides fund balance and transaction information for other staff as requested.
- May serve as a lead worker over subordinate technical, clerical or other support staff by prioritizing, assigning and monitoring their work and providing training as needed.
- Performs other technical duties in support of departmental administrative functions; researches a variety of issues and prepares summaries of findings; initiates, composes and/or prepares complex department memos, letters, reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records and documentation; maintains logs, spreadsheets, lists and files to track operational processes and information.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles, practices, forms and techniques of technical public sector accounting, including internal controls, General Ledger maintenance/reconciliation, and advanced accounts payable, accounts receivable and cash handling practices.
- Basic laws and regulations applicable to public sector accounting.
- Relationships between accounting records and documents for recording and reporting purposes.
- Public sector accounting terminology and methods.
- Advanced bookkeeping practices and procedures.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Clerical customer service techniques.
- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios and percentages.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Evaluate, interpret and apply technical accounting policies, procedures and requirements as they apply to departmental financial activities.



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- Coordinate and perform technical accounting activities in a manner that complies with applicable laws, regulations and policies.
- Check, balance and reconcile documents; maintain accounts payable/receivable and cash receipts.
- Apply advanced technical control procedures to maintain budgetary accounts.
- Maintain complex financial accounts, ledgers, and financial reports.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Serve as a lead worker over subordinate technical, clerical and support staff.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Completion of 60 semester (or equivalent quarter) units from an accredited college, including coursework in accounting, business administration or a related field.

AND

Two (2) years of experience requiring journey-level technical bookkeeping, financial recordkeeping, and/or accounts payable/receivable work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects and. Work may



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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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Financial Technical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Administrative Assistant **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Administrative Assistant performs advanced and difficult clerical duties to relieve management staff of administrative detail; assists in the preparation of difficult and complex correspondence, reports, budget documents, and manuals; researches and compiles data from multiple and varied sources to prepare reports or complete forms; coordinates and provides administrative support during meetings; and performs other related duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Administrative Assistant is a journey-level clerical class. An incumbent in this class performs a wide range of difficult and responsible clerical duties that require advanced knowledge of administrative support practices and procedures. This class is distinguished from the lower-level class of Administrative Clerk because an incumbent in the latter class performs clerical tasks that are of routine to average difficulty. This class is also distinguished from the higher-level class of Administrative Specialist because an incumbent in the latter class performs technical administrative duties that require substantial interpretation and application of laws, regulations and/or specialized departmental and/or program policies.

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.

- Assists in the preparation of difficult and complex correspondence, reports, budget documents, manuals, detailed operating procedures, minutes, agendas, and other written materials; researches and compiles data from multiple and varied sources to prepare reports or complete forms; compiles and organizes content; selects formats, edits, and proofreads various documents; and finalizes documents.
- Prepares, monitors, and processes a variety of transactional documents including purchase requisitions, budget requests and transfers, expenditure claims, and personnel/payroll actions.
- Greets customers in person or over the telephone and directs them to appropriate officials, vendors, or departmental staff; answers inquiries on administrative matters, and provides standard forms as needed; receives complaints and resolves if possible, referring unresolvable issues to a superior.
- Schedules complex meetings involving multiple participants and/or locations; prepares and distributes agendas and meeting materials; maintains appointment calendars for management; makes complex travel arrangements.
- Enters and retrieves information from both hard copy and electronic records; designs and implements various manual and electronic tools to log, track, summarize and report information.
- Develops, maintains, and updates general administrative filing systems in accordance with departmental records retention programs; documents retention storage; creates reference material.



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- Receives and processes routine financial documents, including invoices and bills; prepares payment authorizations, requisitions and check requests; maintains a department petty cash fund; requisitions a variety of supplies, parts, and materials; maintains inventory.
- Develops and maintains mailing lists; prepares and distributes inter-office mail; prepares difficult external mailings.
- May handle sensitive or confidential materials, records, files, and other privileged information.
- Makes difficult employee travel arrangements to attend meetings, conferences, and training seminars; prepares presentation materials as directed.
- Coordinates and executes special projects and assignments.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced office practices, procedures, and equipment.
- Clerical processes pertaining to accounting, purchasing, and data maintenance.
- Methods of maintaining information in digital or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Mathematics including addition, subtraction, multiplication, division, and percentages.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Interpret and apply METRO policies and labor contract provisions, including those related to payroll and employee benefits administration.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Maintain records and control systems with accuracy and attention to detail.
- Type finished copy from rough draft or machine transcription.
- Type at a corrected rate of 50 words per minute from clear copy.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.



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- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Four (4) years of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining recordkeeping systems.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Administrative Clerk **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Administrative Clerk performs a limited range of general clerical duties to support departmental functions; enters data into manual and automated systems; provides telephone and public reception; types, processes and prepares documents; maintains departmental files; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Administrative Clerk is a journey-level clerical class. An incumbent in this class performs clerical tasks that are of routine to average difficulty. This class is distinguished from the higher-level class of Administrative Assistant because an incumbent in the latter class performs advanced-level clerical duties that typically include providing administrative and secretarial support to management.

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.

- Greets customers in person or over the telephone and directs them to appropriate officials, vendors, or departmental staff; answers inquiries on administrative matters, and provides standard forms as needed.
- Types reports, memoranda, records, contracts, letters, specifications, minutes, agendas and other documents; may compose routine correspondence; tabulates statistical and other data; prepares purchase requisitions as assigned; proofread and corrects grammar, punctuation, and spelling.
- Enters and retrieves information from both hard copy and electronic records; uses various manual and electronic tools to log, track, summarize and report information.
- Maintains and updates general administrative files in accordance with departmental records retention programs; documents retention storage; creates reference material.
- Receives and processes routine financial documents, including invoices and bills; prepares payment authorizations, requisitions and check requests; maintains a department petty cash fund; requisitions routine office supplies, parts, and materials and maintains a simple inventory.
- Maintains and updates mailing lists; prepares and distributes inter-office mail.
- Schedules meetings and makes routine preparations; distributes agendas and meeting materials.
- May handle sensitive or confidential materials, records, files, and other privileged information.
- Conducts routine tasks to schedule employee travel, conferences, and training seminars.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:



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- Modern office practices, procedures, and equipment.
- Basic clerical processes pertaining to accounting, purchasing, and data maintenance.
- Basic methods of maintaining information in digital or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Type finished copy from rough draft or machine transcription.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Type at a corrected rate of 50 words per minute from clear copy.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining recordkeeping systems.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical



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Class Code: Class Code
FLSA Status: Pending

Administrative Specialist **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Administrative Specialist performs technical administrative duties to support complex administrative or operational activities; researches, gathers, organizes and prepares data; reviews documents and data for compliance with program requirements; maintains complex files, records, reports, correspondence and other documents; prepares detailed reports regarding budgetary and funding allocations and expenditures; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Administrative Specialist is a technical administrative class. An incumbent in this class performs technical administrative duties that require substantial interpretation and application of laws, regulations and/or specialized departmental and/or program policies. This class is distinguished from the lower-level class of Administrative Assistant because an incumbent in the latter class performs advanced-level clerical rather than technical administrative duties. This class is also distinguished from the higher-level class of Administrative Supervisor as an incumbent in the latter class supervises the work of subordinate clerical and/or technical administrative 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.

- Reviews a wide variety of documents and data including records, forms, correspondence, agreements, grants, contracts, operating plans, program audits, progress reports, service reports, and files, for accuracy, completeness, and compliance with program policies, procedures and requirements.
- Assists in controlling budget account ledgers; assists in researching, compiling and preparing budget proposals; prepares estimates for supply and equipment requirements for budgetary purposes.
- Develops, maintains, and updates administrative procedures; classifies correspondence, reports, documents, publications, and other material in accordance with established index systems; reviews dated files to purge or combine materials; updates index and cross reference files.
- Provides input regarding the design, organization, retrieval, and reporting functions for information management systems; conducts studies to determine the feasibility of modifying administrative systems and procedures to improve efficiencies of automated records processing.
- Collects, complies, and organizes data for reports, recommendations, policies, and special projects for State and Federal agencies, as well as the public; collects, assembles, and interprets data related to project and program operations.
- Composes and prepares correspondence and reports; prepares detailed narrative, oral, statistical and graphic reports; provides information and explains policies to staff and other agencies; researches and prepares responses as directed; maintain complex files and record-keeping systems.



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- Receives, reviews, and processes requests and complaints from other departments, members of the public, and other agencies; researches information to assist management in formulating a response.
- Conducts and coordinates technical administrative studies and projects concerning METRO policies, procedures, programs or grants; assists in planning, implementing, and evaluating administrative tools and opportunities for process improvement; makes recommendations on proposed methods and procedures.
- Designs and develops measurement tools or techniques to assess needs, services, and program effectiveness; develop questionnaires and forms to gather, organize, and tabulate data and information; investigates, studies, and composes reports pertaining to operating procedures and administrative problems.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Technical principles, practices, and procedures common to public administration, including budgeting, records management, purchasing, human resources administration, and the use of technology.
- Basic and regulations applicable to the area of assignment.
- Advanced administrative and office practices, procedures and equipment, including the use of automated information systems to improve administrative practices.
- Technical processes pertaining to accounting, purchasing, and data maintenance.
- Advanced business correspondence, formatting and report writing.
- Technical methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Evaluate, interpret and apply policies, regulations, and requirements as they apply to technical administrative activities.
- Interpret and apply policies, procedures, and Federal and/or State regulations to comply with program or project reporting requirements and organize data into functional reports.
- Coordinate and perform technical administrative activities in a manner that complies with applicable laws, regulations, and policies.
- Investigate and document administrative, operational, and programmatic problems.



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- Work independently using good judgment, tact, and discretion.
- Review and screen documents for minimum qualifications or other requirements.
- Maintain confidentiality of materials, records, files, and other privileged information
- Interpret, explain and apply human resources policies, procedures and regulations.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent quarter) units at an accredited college with coursework in human resources management, industrial relations, public administration, business administration, or a related field.

AND

Three (3) years of responsible administrative experience performing program monitoring and reporting, including responsibility for complex records retention and filing.

Experience in a public agency is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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



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

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical



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Class Code: Class Code
FLSA Status: Pending

Administrative Supervisor **Bargaining Unit: SEA**

DEFINITION:

Under direction, an Administrative Supervisor performs supervisory and technical duties to support complex administrative or operation activities; supervises the work of subordinate clerical and/or technical administrative personnel; researches, gathers, organizes and prepares data; reviews documents and data for compliance with program requirements; maintains complex files, records, reports, correspondence and other documents; prepares detailed reports regarding budgetary and funding allocations and expenditures; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Administrative Supervisor is a supervisory administrative class. In addition to assigned supervisory responsibilities, an incumbent in this class performs the full range of clerical and technical administrative duties performed by subordinate staff. This class is distinguished from the lower-level class of Administrative Specialist because the incumbent supervises the work of subordinate employees.

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.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Determines work procedures; assesses subordinates' workload; plans and prepares schedules; prioritizes assignments and expedites the workflow of the unit.
- Assesses short and long-term staff development needs; develops and implements appropriate training for staff.
- Develops, maintains, and implements administrative procedures and instructs staff in their use; recommends forms; classifies correspondence, reports, documents, publications, and other material in accordance with established index systems; reviews dated files to purge or combine materials; updates index and cross reference files.
- Maintains control of budget account ledgers; researches, compiles and prepares budget proposals; prepares estimates for supply and equipment requirements for budgetary purposes.
- Provides input regarding the design, organization, retrieval, and reporting functions for information management systems; conducts studies to determine the feasibility of modifying administrative systems and procedures to improve efficiencies of automated records processing.
- Collects, compiles, and organizes data for reports, recommendations, policies, and special projects for State and Federal agencies, as well as the public; collects, assembles, and interprets data related to project and program operations.
- Composes and prepares correspondence and reports; prepares detailed narrative, oral, statistical and graphic reports; provides information and explains policies to staff and other agencies; researches and prepares responses as directed; maintain complex files and record-keeping systems.



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- Receives, reviews, and processes requests and complaints from other departments, members of the public, and other agencies; researches information to assist management in formulating a response.
- Conducts and coordinates technical administrative studies and projects concerning METRO policies, procedures, programs or grants; assists in planning, implementing, and evaluating administrative tools and opportunities for process improvement; makes recommendations on proposed methods and procedures.
- Designs and develops measurement tools or techniques to assess needs, services, and program effectiveness; develop questionnaires and forms to gather, organize, and tabulate data and information; investigates, studies, and composes reports pertaining to operating procedures and administrative problems.
- Performs general clerical and secretarial work to support management as required.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Technical principles, practices, and procedures common to public administration, including budgeting, records management, purchasing, human resources administration, and the use of technology.
- Basic and regulations applicable to the area of assignment.
- Advanced administrative and office practices, procedures and equipment, including the use of automated information systems to improve administrative practices.
- Technical processes pertaining to accounting, purchasing, and data maintenance.
- Advanced business correspondence, formatting and report writing.
- Technical methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Supervise and motivate subordinate staff effectively.
- Evaluate, interpret and apply policies, regulations, and requirements as they apply to technical administrative activities.



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- Interpret and apply policies, procedures, and Federal and/or State regulations to comply with program or project reporting requirements and organize data into functional reports.
- Coordinate and perform technical administrative activities in a manner that complies with applicable laws, regulations, and policies.
- Investigate and document administrative, operational, and programmatic problems.
- Work independently using good judgment, tact, and discretion.
- Review and screen documents for minimum qualifications or other requirements.
- Maintain confidentiality of materials, records, files, and other privileged information
- Interpret, explain and apply human resources policies, procedures and regulations.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent quarter) units at an accredited college with coursework in human resources management, industrial relations, public administration, business administration, or a related field.

AND

Four (4) years of responsible administrative experience performing program monitoring and reporting, including responsibility for complex records retention and filing. Experience must have included at least one year at a technical administrative level.

Experience in a public agency is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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



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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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
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*Job Family: Administrative Technical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Benefits Technician **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, the Benefits Technician performs technical administrative duties to coordinate, maintain and administer employee, retiree and COBRA benefits programs in the Human Resources (HR) Department; assists in the administration, implementation, and modification of employee benefit programs; acts as liaison between the Santa Cruz METRO, employees, insurance carriers, contractors, and others; may assist with other HR technical functions in support of recruitment, records administration, employee relations, classification, compensation, staff development and/or other activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Benefits Technician is a journey-level technical administrative class. An incumbent in this class performs tasks requiring interpretation and application of specialized HR policies related to the administration and maintenance of employee, retiree and COBRA benefits while ensuring that assigned activities comply with various legal, regulatory, policy and other requirements.

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.

- Coordinates, organizes and conducts technical benefits-related activities following established procedures.
- Processes all benefit enrollment and billing for new, active, retiring, and separating employees; maintains and monitors benefit programs for compliance with insurance contracts and labor contracts; provides information related to benefit plans including medical, dental, vision, life, long term disability insurance, Employee Assistance Program, and others.
- Develops, prepares, and presents the benefits portion of the new employee orientation program; determines initial and ongoing eligibility for benefit programs; schedules and conducts offsite open enrollment meetings.
- Assists in the administration, implementation, and modification of employee benefit and insurance programs with contractors and carriers; coordinates and monitors employee benefit programs, enrollments, and expenses related to the Santa Cruz METRO budget; assists in maintaining State, Federal, and other regulatory compliance for all employee benefit programs.
- Participates in reviewing benefit programs and insurance plan documents, proposals, bids, specifications, forms, announcements and other benefit related technical documents.
- Provides cost and enrollment information to Finance as requested to assist in the preparation of the Santa Cruz METRO annual budget; monitors insurance premiums and other benefit-related administrative expenses; audits, reviews, corrects, and prepares billing documentation for payment.
- Serves as a liaison on employee benefits issues between HR, employees, retirees, terminated employees, dependents, beneficiaries, Santa Cruz METRO departments, insurance carriers, contractors, and others; prepares claim forms; monitors employee leave reports for benefit tracking purposes.



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- Coordinates with Payroll on benefit deductions and 457 Plan annual contribution limits.
- Audits payroll reports for benefits-related errors; verifies that proper health and life insurance deductions have been taken; conducts research as needed; notifies employees of errors and monies owed; creates payroll deduction forms for payroll; collects checks and provides to Finance.
- Updates and maintains benefits and other information in the computerized METRO Human Resources Information System (HRIS); conducts HRIS queries and prepares regular and periodic reports for management as requested; maintains various logs and lists.
- Performs technical research and prepares summaries of findings; initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents; writes, updates and maintains department procedures and procedure manuals.
- May perform other HR technical duties in support of recruitment, records administration, employee relations, classification, compensation, staff development and/or other activities.
- May supervise subordinate clerical and/or other support staff by scheduling, assigning, directing and evaluating their work; provides staff training as needed; may perform and/or have significant input into subordinate staff selection and disciplinary action.
- Maintains confidential materials, records, files, and other privileged information.
- May monitor expenditures and prepare payment authorizations.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax machine, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Technical principles, practices, and procedures common to public employment, including employee benefits and insurance programs.
- Basic laws and regulations applicable to public agency benefits administration.
- Modern office practices, procedures, and equipment, including automated human resources information systems.
- Technical processes pertaining to accounting, purchasing, and data maintenance.
- Business correspondence, formatting and report writing.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Advanced time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.



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Ability to:

- Evaluate, interpret and apply human resources policies, regulations, and requirements, particularly those applicable to the administration of employee benefits.
- Coordinate and perform technical human resources activities in a manner that complies with applicable laws, regulations, and policies.
- Work independently using good judgment, tact, and discretion.
- Maintain confidentiality of materials, records, files, and other privileged information
- Interpret, explain and apply human resources policies, procedures and regulations.
- Gather, record and summarize data in a variety of formats.
- Develop and maintain records and control systems with accuracy and attention to detail.
- Supervise the work of subordinate clerical and/or support staff.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Five (5) years of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining detailed recordkeeping systems. Experience must have also included at least three (3) years of benefits administration experience in a centralized human resources organization.

Recent experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 25 pounds unaided may be required. Specific visual



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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; uses basic math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Administrative Technical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Claims Technician I **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Claims Technician I performs a limited range of technical duties to support METRO risk management functions and activities while learning to perform the full scope of journey-level duties; receives, reviews, and processes injury and property damage claims to assist METRO Counsel with the determination of District liability; uses established procedures to conduct field investigations of accidents/incidents as well as claims and litigation filed against METRO; assists with administering settlements and property recovery activities for routine liability claims based on established parameters; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Claims Technician I is the first working-level class of the series. An incumbent in this class performs the more routine technical office and field tasks requiring basic interpretation and application of department policies and procedures and specialized investigative skills. This class may be distinguished from the higher-level class of Claims Technician II because an incumbent in the latter class performs the full scope of journey-level technical claims work.

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.

- Performs routine technical duties to support METRO risk management functions and activities while learning to perform the full scope of journey-level duties.
- Receives, reviews and processes injury and property damage claims to assist in the determination of District liability; collects and records accident/incident information; organizes materials and establishes/maintains claim files; verifies medical treatment expenses and lost wages; compiles data on the value of property damage.
- Maintains and tracks the status of claims and prepares regular status reports.
- Conducts field investigations of accidents/incidents using established procedures; interviews and takes statements of claimants, employees, and witnesses; visits accident scenes and takes pictures and measurements; examines and documents property damage; gathers injury and other pertinent information; observes and documents hazards found during investigations.
- Assists in preparing discovery documents and performing investigation tasks related to litigation files; assists at trials, hearings, and other legal proceedings as required.
- Administers recovery actions for property damages sustained by the District from vehicle accidents, tenant lease agreements, and other related expenses.
- Administers routine settlements or other actions on litigated and non-litigated claims within established limits; may participate in negotiations.
- May represent the District as a witness in small claims court hearings; prepares and provides appropriate information and required documentation.
- Operates field investigation tools including photographic equipment; operates District vehicles, computer programs and equipment, and other office machines.



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- Performs other technical duties in support of departmental administrative functions; researches issues and prepares summaries of findings; initiates, composes and/or prepares memos, letters, reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records, and documentation; maintains logs, spreadsheets, lists and files to track processes and information.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and other equipment; operates field investigation tools including photographic equipment.
- Utilizes standard business software in performing job tasks; may utilize specialized METRO software.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic laws relating to property and liability claims, including contributory negligence theories.
- Basic California judicial system procedures related to liability claims.
- Basic medical and legal terminology and related documents.
- Claims investigation methods and techniques, including methods of negotiating settlements.
- Interviewing principles and techniques.
- Field procedures and techniques for collecting evidence at accident/incident sites.
- Safety regulations pertaining to hazardous materials at an accident/incident site.
- Basic discovery techniques.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Understand and apply laws and administrative policies and procedures in the evaluation of routine property and liability insurance claims.
- Investigate and recommend settlement of routine property and liability claims.
- Investigate accident scenes, analyze events and draw sound conclusions.
- Interview witnesses on the telephone and in person.
- Prepare files, documents, charts, reports, and correspondence.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.



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- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent) units from an accredited college including coursework in paralegal studies, risk management, claims resolution, business law, law enforcement, business administration or a related field of coursework.

AND

Six (6) months of experience performing property and liability claims investigation.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must be fluent in both English and Spanish.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee frequently works in a standard office environment where the noise level is usually moderate. Field work is occasionally required.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

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*Job Family: Administrative Technical



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Class Code: Class Code
FLSA Status: Pending

Claims Technician II **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Claims Technician II performs technical duties to support METRO risk management functions and activities; receives, reviews and processes injury and property damage claims to assist METRO Counsel with the determination of District liability; uses established procedures to conduct field investigations of accidents/incidents claims and litigation filed against METRO; administers settlements for routine liability claims based on established parameters; administers property recovery activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Claims Technician II is the journey-level class of the series. An incumbent in this class performs the full scope of journey-level technical office and field tasks requiring interpretation and application of department policies and procedures and specialized investigative skills. This class may be distinguished from the lower-level class of Claims Technician I because an incumbent in the latter class performs a limited range of technical claims duties while learning to perform the full range of journey-level work.

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.

- Performs journey-level technical duties to support METRO risk management functions and activities.
- Receives, reviews and processes injury and property damage claims to assist in the determination of District liability; collects and records accident/incident information; organizes materials and establishes/maintains claim files; verifies medical treatment expenses and lost wages; compiles data on the value of property damage.
- Maintains and tracks the status of claims and prepares regular status reports.
- Conducts field investigations of accidents/incidents using established procedures; interviews and takes statements of claimants, employees, and witnesses; visits accident scenes and takes pictures and measurements; examines and documents property damage; gathers injury and other pertinent information; observes and documents hazards found during investigations.
- Assists in preparing discovery documents and performing investigation tasks related to litigation files; assists at trials, hearings, and other legal proceedings as required.
- Administers recovery actions for property damages sustained by the District from vehicle accidents, tenant lease agreements and other related expenses.
- Administers routine settlements or other actions on litigated and non-litigated claims within established limits; may participate in negotiations.
- May represent the District as a witness in small claims court hearings; prepares and provides appropriate information and required documentation.
- Operates field investigation tools including photographic equipment; operates District vehicles, computer programs and equipment, and other office machines.
- Performs other technical duties in support of departmental administrative functions; researches issues and prepares summaries of findings; initiates, composes and/or prepares memos, letters,



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reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records, and documentation; maintains logs, spreadsheets, lists and files to track processes and information.

- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and other equipment; operates field investigation tools including photographic equipment.
- Utilizes standard business software in performing job tasks; may utilize specialized METRO software.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic laws relating to property and liability claims, including contributory negligence theories.
- Basic California judicial system procedures related to liability claims.
- Basic medical and legal terminology and related documents.
- Claims investigation methods and techniques, including methods of negotiating settlements.
- Interviewing principles and techniques.
- Field procedures and techniques for collecting evidence at accident/incident sites.
- Safety regulations pertaining to hazardous materials at an accident/incident site.
- Basic discovery techniques.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Understand and apply laws and administrative policies and procedures in the evaluation of routine property and liability insurance claims.
- Investigate and recommend settlement of routine property and liability claims.
- Investigate accident scenes, analyze events and draw sound conclusions.
- Interview witnesses on the telephone and in person.
- Prepare files, documents, charts, reports, and correspondence.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.



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- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent) units from an accredited college including coursework in paralegal studies, risk management, claims resolution, business law, law enforcement, business administration or a related field of coursework.

AND

Two (2) years of experience performing property and liability claims investigation.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must be fluent in both English and Spanish.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee frequently works in a standard office environment where the noise level is usually moderate. Field work is occasionally required.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Administrative Technical



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Class Code: Class Code
FLSA Status: Pending

Custodial Service Worker **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Custodial Service Worker performs janitorial and related tasks at METRO facilities; keeps facility interiors and exteriors clean and orderly; performs minor building maintenance duties; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Custodial Service Worker is the journey-level class in the series. An incumbent in this class performs janitorial and routine facility maintenance duties necessary to maintain clean, sanitary, and safe conditions in various METRO facilities.

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.

- Cleans floors, including sweeping, spot cleaning, dust mopping, and periodic scrubbing and waxing as needed; operates buffers, carpet cleaners, floor strippers, and steam cleaning equipment as needed.
- Washes walls, ceilings, and partitions, using wall brushes, mops, cloths, and cleaning solutions.
- Wipes and dusts furniture, doors, walls, ledges, posts, benches, signs, and coin equipment.
- Collects trash from bus passenger and landscaped areas; empties and disinfects trash receptacles; disposes of waste paper and other discards; empties and cleans recycling containers.
- Cleans restrooms and toilet facilities using cleansers and sanitizing solutions, brushes, cloths, and squeegees; stocks restroom supplies.
- Removes graffiti from various surfaces.
- Cleans interior and exterior windows.
- Sanitizes drinking fountains.
- Posts and removes public informational material.
- Conducts safety checks by observing and checking locked doors, temperature readings for heating and air conditioning, and on/off switches for machines.
- Creates proper dilutions of cleaning solutions.
- Performs routine maintenance on janitorial equipment, tools, and machinery; checks and maintains equipment fuel and oil levels; may make minor repairs as needed.
- May perform minor plumbing, painting, electrical, grounds or related maintenance tasks as assigned.
- May assist with preparations for meetings and events; may perform special cleaning tasks; may set up, move and/or arrange furniture or equipment.
- Reports safety, sanitary and fire hazards; addresses immediate hazards appropriately until repairs/corrections can be made.
- Maintains custodial closets and custodial storage areas in a neat and orderly fashion.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.



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EMPLOYMENT STANDARDS:

Knowledge of:

- Acceptable standards for the cleaning and routine maintenance of public facilities.
- Commercial cleaning practices, supplies, and equipment.
- Basic operation of janitorial equipment such as buffers, carpet cleaners, floor strippers, and other cleaning equipment.
- General safety practices related to janitorial work.
- Basic mathematical skills to create proper dilutions of cleaning products.
- Proper use of cleaning tools, equipment, and supplies, including the use of various chemicals.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Basic time management techniques.
- Basic building and grounds maintenance techniques, including routine plumbing, painting, electrical and landscaping activities.

Ability to:

- Understand and follow oral and written directions.
- Perform a wide variety of janitorial and routine facility maintenance duties in an effective and safe manner.
- Safely operate janitorial equipment.
- Safely use chemical cleaning agents.
- Use basic mathematical skills including addition, subtraction, multiplication, division, and fractions.
- Work with moderate independence using good judgment, tact, and discretion.
- Adhere to established work schedules and timelines.
- Interact effectively and courteously with the public.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of experience performing janitorial and cleaning tasks.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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



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While performing the duties of this job, the employee is often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects. The employee is regularly required to stoop at the waist, kneel, crouch, crawl and climb. Occasional lifting up to 25 pounds unaided may be required. 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; uses basic mathematical skills; solves routine problems; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in various facilities where there is frequent exposure to moving mechanical parts and is occasional exposure to hot, wet and/or humid conditions, fumes, toxic or caustic chemicals. The noise level is usually moderate. The employee is occasionally exposed to varied weather conditions.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Custodial



Attachment C

Class Code: Class Code
FLSA Status: Pending

Custodial Supervisor **Bargaining Unit: PSA**

DEFINITION:

Under direction, a Custodial Supervisor performs supervisory and related work to ensure the cleanliness and routine maintenance of METRO facilities; ensures the training of new employees in proper custodial procedures including the use of manually operated tools, electrically-powered machines, cleaning compounds, solvents and chemicals; oversees the ordering of supplies, inspection of equipment and maintenance of inventory; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Custodial Supervisor is the supervisory-level class in the series. An incumbent in this class is responsible for supervising the work of custodial staff in the performance of janitorial and routine facility maintenance duties necessary to maintain clean, sanitary, and safe conditions in various METRO facilities. This class is distinguished from the lower-level class of Senior Custodial Service Worker because an incumbent in the latter class serves as a lead worker over subordinate Custodial Service Workers.

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.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Enforces department rules and policies regarding employee conduct.
- Ensures that assigned functions meet the needs of the department and comply with established laws, regulations, policies, procedures, and standards; ensures that subordinates' work complies with Cal-OSHA regulations; determines and directs corrective measures as necessary.
- Inspects METRO facilities to ensure compliance with standards of cleanliness and maintenance and verify appropriate health and safety conditions; inspects equipment and tools to ensure proper maintenance and operating condition; documents inspection findings; advises staff of needed corrections.
- Ensures that facilities are cleaned in time for scheduled meetings or other activities.
- Oversees the acquisition of materials, equipment and supplies and the maintenance of sufficient inventory to meet anticipated needs.
- Communicates with vendors and suppliers; evaluates new custodial supplies and equipment by testing items and recommending the appropriateness of usage.
- Coordinates special custodial projects.
- Develops and revises work forms as needed.
- Prepares administrative records and reports; reviews employee time sheets and monitors employee absences.
- Monitors and oversees budgets for custodial staff and supplies; prepares justifications for staffing changes and other expenditures.



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- Stays current on commercial janitorial practices and standards; attends conferences, meetings, and training as assigned.
- Responds to emergency conditions as required by the situation; assumes responsibility for the situation until emergency assistance arrives.
- Performs the duties of Custodial Service Workers as required.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Acceptable standards for the cleaning and routine maintenance of public facilities.
- Applicable laws, regulations, policies, procedures and general safety practices related to janitorial work.
- Standard and specialized equipment, parts, tools and supplies required for commercial janitorial work.
- Operation of janitorial equipment such as buffers, carpet cleaners, floor strippers, and other cleaning equipment.
- Commercial cleaning practices, supplies, and equipment.
- Proper use of various cleaning chemicals.
- Basic building and grounds maintenance techniques, including routine plumbing, painting, electrical and landscaping activities.
- Basic operation and maintenance of heating and ventilating equipment.
- Standard tools, terminology, and practices used in skilled maintenance trades.
- Methods of prioritizing, planning and organizing work.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Time management techniques.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Supervise and motivate subordinate staff effectively.
- Supervise and perform a wide variety of janitorial and routine facility maintenance duties in an effective and safe manner.
- Interpret, explain, implement and enforce relevant policies, regulations, and requirements.
- Plan and prioritize staffing and required work priorities.
- Ensure the safe operation of janitorial equipment.
- Ensure the safe use of chemical cleaning agents.



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- Interact effectively and courteously with the public and address customer complaints in a sensitive and tactful manner.
- Prepare a variety of operational reports and maintain work records.
- Work independently using good judgment, tact, and discretion.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Four (4) years of commercial custodial experience. Experience must also have included at least two (2) years of lead worker experience.

Previous supervisory experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects. The employee is regularly required to stoop at the waist, kneel, crouch, crawl and climb. Occasional lifting up to 25 pounds unaided may be required. 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; uses basic mathematical skills; solves routine problems; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:



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The employee works in various facilities where there is frequent exposure to moving mechanical parts and is occasional exposure to hot, wet and/or humid conditions, fumes, toxic or caustic chemicals. The noise level is usually moderate. The employee is occasionally exposed to varied weather conditions.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Custodial



Attachment C

Class Code: Class Code
FLSA Status: Pending

Customer Service Representative **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Customer Service Representative performs clerical and customer service work related to the provision of information and assistance regarding transit services to customers; participates in transit-related special projects which may include marketing, public information, and community outreach activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Customer Service Representative is the journey level class in the series. An incumbent in this class performs a variety of customer service functions in a call center or information booth and may assist with outreach/public relations functions. This class may be distinguished from the higher-level class of Senior Customer Service Representative because an incumbent in the latter class serves as a lead worker over 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.

- Performs a variety of 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 call-backs; 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 METRO at special events; may assist with the design and preparation of brochures, informational flyers, written articles, and news releases.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; operates a cash register and photography equipment; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures, and equipment, including multi-line telephone systems.



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- 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 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 addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- 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 scheduling.
- 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 METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Utilize specialized equipment such as ticketing machines, cash registers, and photo identification printers.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:



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Education, Training and Experience:

One (1) year of progressively responsible clerical customer service experience in a call center or telephone sales environment.

Experience processing cash transactions is desirable.

Fluency in English and Spanish is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Customer Service



Attachment C

Class Code: Class Code
FLSA Status: Pending

Customer Service Supervisor **Bargaining Unit: PSA**

DEFINITION:

Under direction, a Customer Service Supervisor performs supervisory and customer service work by overseeing and directing the day-to-day functions of the Customer Service Department; provides a variety of information and assistance to customers related to transit services; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Customer Service Supervisor is the supervisory level class in the series. An incumbent in this class performs tasks that ensure the day-to-day customer service functions are performed in an effective manner by overseeing and directing staff. This position may be distinguished from the lower-level class of Senior Customer Service Representative because an incumbent in the latter class serves as a lead worker over subordinate Customer Service Representatives and performs the more difficult customer service duties.

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.

- Supervises subordinate staff; assigns, directs, and monitors work; provides staff training; evaluates employee performance; initiates or has significant input into disciplinary actions.
- Schedules customer service work assignments ensuring adequate coverage for all functions; monitors customer interactions, including customer calls, to ensure quality customer service.
- Participates in the recruitment, selection, and on-boarding process of new departmental employees.
- Directs the cash handling activities of customer service staff; balances, reconciles and reports on daily, weekly, and quarterly sales; works with bank to obtain weekly change orders; works with Finance department to ensure internal controls for verifying cash balances and other departmental financial records; may assist with the creation of and/or provide data for financial reports.
- Oversees a variety of departmental programs and services, including Lost and Found services, identification card services, distribution of transit schedules and supplementary route information, school presentations, and other customer service activities.
- Assists in the design, scheduling, implementation, and administration of a variety of special projects, programs and events related to METRO's community outreach and public information.
- Reviews, responds to, and resolves customer service complaints in a timely manner, including those escalated by lower level staff; ensures complaints are forwarded to appropriate departments as needed.
- Coordinates with other METRO departments for needed supplies, equipment, repairs, updates, or other assistance, as needed; orders and purchases materials and supplies for department, as assigned.



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- Develops and prepares a variety of reports, internal documents, records, forms, files, statistical data, policies and procedures, as assigned.
- Performs the functions of subordinate staff, as required.
- Makes mathematical calculations.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- 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 METRO customers.
- METRO labor contracts.
- Local and regional transportation services.
- Advanced customer service techniques.
- Money handling procedures including the accurate and safe counting of large sums of cash.
- Advanced telephone techniques and etiquette.
- Public speaking techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Supervise and motivate subordinate staff effectively.
- 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 scheduling.
- Address customer complaints with tact, discretion, and good judgment.
- Maintain a calm demeanor in stressful situations.
- Count and record currency and receipts accurately and safely, in accordance with established procedures.
- Prepare deposits.
- Assist with designing and preparing a variety of public information, marketing, and planning materials and presentations.
- Drive a METRO vehicle to perform assignments as required.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.



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- Utilize specialized equipment such as ticketing machines, cash registers, and photo identification printers.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent) units from an accredited college with coursework in business administration, communications, public relations, or a related field.

AND

Two (2) years of progressively responsible clerical customer service experience equivalent to a Senior Customer Service Representative with Santa Cruz Metro.

OR

Three (3) years of progressively responsible clerical customer service experience equivalent to a Customer Service Representative with Santa Cruz Metro.

Previous experience serving as a lead worker and fluency in Spanish are desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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:



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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 requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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*BOD Approved: 00-00-00
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*Job Family: Customer Service



Attachment C

Class Code: Class Code
FLSA Status: Pending

Electronic Technician **Bargaining Unit: VMU**

DEFINITION:

Under general supervision, an Electronic Technician performs technical work related to the installation, maintenance, repair, and replacement of electronic systems and devices located in METRO vehicles and facilities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Electronic Technician is a journey-level technician class. An incumbent in this class performs tasks to ensure electronic systems and devices related to METRO's vehicles, equipment, and facilities are maintained in an operational and safe condition.

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.

- Performs a variety of skilled tasks in the installation, maintenance, modification, diagnosis, and repair of electronic, computer-based and related systems and devices located in METRO vehicles and facilities; installs, tests, diagnoses, repairs, and/or removes a variety electronic equipment including fare boxes, Ticket Vending Machines (TVM), destination signs, and communication devices; ensures completed work adheres to required specification and standards.
- Designs and fabricates mounting devices to install electronic devices, as needed; may modify electronic components and devices for use on METRO vehicles and in METRO facilities.
- Schedules and performs preventative maintenance tasks for electronic systems and devices; establish preventative maintenance schedules based on manufacturers guidelines; researches and maintains information and documents related to preventative maintenance, defects, and repairs.
- Maintains records of preventative maintenance, modifications, and repairs performed on electronic equipment, including work performed and parts and materials used; establishes component duty-cycle intervals.
- Ensures METRO service manuals are current; maintains and organizes updated manufacturers' specifications; provides updates to other staff related to parts and material changes and/or substitutions.
- Works with Purchasing and the Parts Department to establish and maintain sufficient inventory of parts and materials in order to maintain METRO electronic equipment without significantly impacting operations.
- Provide information, assistance, and training to other staff regarding the installation, use, maintenance, and repair of electronic systems and components.
- Oversees and inspects the work of contractors and vendors working on electronic equipment, as assigned.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.



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- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Diagnostic, maintenance and repair techniques and procedures related to electrical systems, equipment, and devices.
- Principles and practices of preventive maintenance for electronic equipment, devices, and systems.
- Safe work practices in the shop and the field.
- Methods, materials, test equipment and tools used in the diagnosis, repair, installation, and maintenance of electrical systems, devices and equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Mathematics including addition, subtraction, multiplication, division, and percentages.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Effectively test, diagnose, and perform corrective maintenance on METRO electronics systems, devices, and equipment.
- Read and interpret blueprints, manuals, schematics, work orders, and specifications.
- Read, understand and apply technical information found in repair manuals, service change bulletins, and applicable technical documents.
- Remain current on new technologies related to the transit industry, surveillance and communications equipment.
- Operate and maintain a variety of hand and power tools, and testing equipment used in installing, repairing, and maintaining electrical systems, equipment, and devices.
- Apply safe work practices and procedures.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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:

Completion of 60 semester (or equivalent) units from an accredited college with coursework in electronics, electrical technology or a related field.

OR

Two (2) years of progressively responsible experience installing, maintaining and repairing electrical/electronic systems.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Facilities Maintenance Assistant **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Facilities Maintenance Assistant performs unskilled and semi-skilled tasks maintenance, repair and construction of METRO facilities and properties; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Facilities Maintenance Assistant is the first working-level class in the series. An incumbent in this class performs a limited range of unskilled and semi-skilled facility maintenance work emphasizing routine plumbing, electrical, landscaping, and general facility upkeep. This class is distinguished from the higher-level class of Facilities Maintenance Worker because an incumbent in the latter class performs a wide variety of semi-skilled and skilled facility maintenance work that includes the maintenance and repair of tools and equipment.

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.

- Performs a limited range of unskilled and semi-skilled tasks related to the maintenance and repair of METRO facilities, properties, and related equipment.
- Removes graffiti from bus stops, benches, signs, and surrounding areas.
- Cuts tree branches, shrubs, remove weeds, and blows and picks up debris.
- Collects trash and performs needed sanitation on bus stops, such as wiping down benches and cleaning up spills; responds to biohazard reports.
- Performs minor plumbing repairs such as clearing plugged drains, replacing plumbing appliance parts and repairing sprinkler systems.
- Performs minor electrical repairs such as replacing light tubes and fixtures.
- Performs minor repairs on bus stops and shelters such as replacing roofing, cleaning roofs, cleaning rain gutters, tightening or replacing bolts that anchor shelters to concrete pads, and inserting/removing bus stop poles.
- Paints curbs to designate bus loading zones.
- Maintains work vehicle, tools, equipment, supplies, and work areas in proper and clean condition.
- Drives a dump truck to the County landfill and unloads trash.
- Refuels work vehicles.
- Assists with moving and transporting furniture, equipment, and other heavy objects as needed.
- Assists Facilities Maintenance Workers with projects as assigned.
- Operates a variety of manual and power tools and equipment including hand tools, bench and table tools, and landscaping tools; operates vehicles such as dump trucks, truck mounted cranes and forklifts.
- Performs other duties as assigned.



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EMPLOYMENT STANDARDS:

Knowledge of:

- Basic principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of buildings and facilities.
- Methods and equipment used in groundskeeping operations.
- Occupational hazards of the maintenance trades and appropriate safety equipment and practices.
- Safe work practices.
- The proper operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Time management techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- The effective use of modern office equipment, personal computers and applicable standard business software.

Ability to:

- Follow oral and written instructions.
- Perform routine maintenance, repair, construction and remodeling to facilities, properties, and related equipment.
- Read and interpret blueprints, plans, and technical manuals.
- Use manual and power tools and equipment safely.
- Safely handle hazardous items and materials in accordance with established procedures.
- Make quick decisions in an emergency.
- Maintain records and input data into a database.
- Adhere to established work schedules and timelines.
- Perform duties using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

One (1) year of experience performing building repair and maintenance work.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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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 often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, crawl, kneel, crouch, and climb. Occasional lifting up to 50 pounds unaided may be required. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in a shop environment where the noise level is usually noisy. The employee may work outdoors in varied weather conditions with potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals. Work requires heavy physical labor and working in confined spaces.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Facilities Maintenance Supervisor **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Facilities Maintenance Supervisor performs supervisory and skilled maintenance work related to the maintenance, repair, and construction of METRO facilities, properties, buildings, and related equipment; supervises and evaluates assigned maintenance staff; coordinates and develops safety and training programs for assigned areas; develops, implements and supervises department record-keeping and information systems; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Facilities Maintenance Supervisor is the supervisory-level class in the series. An incumbent in this class supervises and performs systems maintenance, repair and renovation work for METRO buildings and facilities to ensure they safe and operational. This class is distinguished from the Senior Facilities Maintenance Worker because an incumbent in the latter class serves as a lead worker over subordinate Maintenance Workers and may perform the more difficult skilled maintenance tasks.

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.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Instructs and trains employees regarding improved work techniques and safety measures; recommends employees for training; evaluates training options; determines training required by Federal, State, and local laws and regulations; plans, assists and conducts training as appropriate.
- Plans, organizes and schedules the maintenance, repair, and alteration of METRO facilities and equipment; estimates the supplies, equipment and hours needed for projects; ensures that staff has the resources necessary to complete their work.
- Ensures that assigned areas comply with Federal, State, and local laws and regulations.
- Assists in the development of department policies, procedures, work standards, rules and budgets; enforces METRO and department rules, regulations, policies, procedures, and work standards.
- Develops and supervises the maintenance of records including an inventory of supplies needed for facility service and repair; reviews and prioritizes tickets and work orders; solicits and receives quotes from outside vendors to complete jobs.
- Assists in establishing design standards and criteria for projects, including bus stops, facilities, and equipment; reviews project plans for errors and omissions and prepares recommendations; performs cost analyses; administers storage and disposal of surplus fixed assets; monitors building operation costs; collects, records, and utilizes data for project analysis reports.
- Reviews and administers facilities' leases and service contracts; monitors contractor compliance with contracts, specifications and equipment installation.
- Prepares technical studies and reports; obtains and renews required permits related to equipment and building operation.



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- Represents the department at meetings; may serve as liaison to other departments, the public, and outside agencies; reviews, investigates, and responds to complaints regarding mechanical or safety problems.
- Operates field and facility maintenance equipment, tools and vehicles as needed.
- Evaluates transit improvements, including building sites, bus stops, and turnouts.
- Inspects and evaluates work in progress and completed work for compliance with building and safety standards and codes; receive quotes from outside vendors to complete jobs.
- Monitors and records diesel fuel level daily and orders fuel as needed.
- Receives key requests, issues keys and returns keys.
- Offloads CNG fuel from truck to fuel storage tanks.
- Performs data entry to update and maintain information in computerized files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents; answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Policies, procedures, rules, regulations, and labor contracts that affect employees.
- Applicable Federal, State, and local laws regulatory codes, ordinances and procedures relevant to assigned area of responsibility.
- Principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of METRO buildings and facilities, including carpentry, plumbing, painting, concreting, masonry, HVAC, welding, mechanical and electrical work.
- Uniform Building and Electrical codes.
- Operation and maintenance of internal combustion engines and hydraulic equipment.
- Occupational hazards of the maintenance trades and appropriate safety equipment and practices.
- Methods and equipment used in groundskeeping operations.
- Safe operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.



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Ability to:

- Supervise and motivate subordinate staff effectively.
- Provide safety-related and other training to staff and ensure a safe work environment.
- Read and interpret building and mechanical codes, blueprints, plans, and technical manuals.
- Diagnose and troubleshoot equipment problems.
- Estimate costs and determine materials and equipment needed to make building and equipment repairs.
- Develop, write and implement operational procedures.
- Use manual and power tools and equipment safely.
- Make quick decisions in an emergency.
- Ensure the safe handling of hazardous items and materials.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Perform mathematical calculations, including ratios and percentages.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 journey-level experience in facilities maintenance or building trade. At least one (1) year in a lead worker capacity is desirable.

Completion of 30 semester (or equivalent) units in construction technology, business administration, building inspection, energy management or a related field is desirable and may substitute for one year of the required experience.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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



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While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 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; solves problems; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop environment where the noise level is usually noisy. The employee may work outdoors in varied weather conditions with potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals. Work requires heavy physical labor and working in confined spaces.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Required to be able to respond to emergency situations seven days per week, 24 hours per day.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Maintenance



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Class Code: Class Code
FLSA Status: Pending

Facilities Maintenance Worker Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Facility Maintenance Worker performs semi-skilled and skilled tasks related to the maintenance, repair, and construction of METRO facilities, properties, and related equipment; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Facilities Maintenance Worker is the journey-level class in the series. An incumbent in this class performs a wide variety of semi-skilled and skilled facility maintenance work that includes the maintenance and repair of tools and equipment. This class is distinguished from the lower-level class of Facilities Maintenance Assistant because an incumbent in the latter class performs unskilled and semi-skilled facilities maintenance work that is routine, both in terms of scope and the facilities involved. This class is also distinguished from the higher-level class of Senior Facilities Maintenance Worker because an incumbent in the latter class serves as a lead worker and also performs and coordinates more difficult maintenance and repair projects.

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.

- Performs a wide variety of semi-skilled and skilled tasks related to the maintenance, repair, construction and remodeling of METRO facilities, properties, and related equipment.
- Inspects facilities and related equipment for needed repairs including lighting, electrical, plumbing, roofing, HVAC and mechanical systems; inspects walls, windows, locks, and doors; tests and checks landscaping and irrigation systems.
- Determines materials and time needed to conduct needed maintenance or repairs; requisitions or otherwise requests needed materials and equipment to perform work; meets with vendors or contractors as necessary to review project activities.
- Performs maintenance, repair, construction or remodeling work utilizing carpentry, plumbing, electrical, painting, door/window, locksmith, alarm, roofing, and related trade skills.
- Maintains and repairs washers, lifts, cranes, water and air systems, pumping systems, dispensing systems and other.
- Monitors and maintains secondary storage systems including above-ground waste storage and hazardous materials storage; pumps out waste collection systems; collects stormwater runoff samples for hazardous testing.
- Offloads Compressed Natural Gas (CNG) and diesel fuel from trucks to METRO fueling facilities; monitors fuel station; implements emergency procedures for spill recovery as required.
- Performs landscaping and hardscaping repair and maintenance; installs concrete; paints buildings; repairs benches.
- Operates a variety of manual and power tools and equipment including hand tools, bench and table tools, welding tools and landscaping tools; operates vehicles such as dump trucks, truck mounted cranes and forklifts.
- Prepares time and materials estimates for assigned projects.



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- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of buildings and facilities, including carpentry, plumbing, painting, concreting, masonry, HVAC, welding, mechanical and electrical work.
- Uniform Building and Electrical codes.
- Operation and maintenance of internal combustion engines and hydraulic equipment.
- Occupational hazards of the maintenance trades and appropriate safety equipment and practices.
- Methods and equipment used in groundskeeping operations.
- Safe operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Perform a wide variety of maintenance, repair, construction and remodeling to facilities, properties, buildings, and related equipment.
- Read and interpret building and mechanical codes, blueprints, plans, and technical manuals.
- Diagnose and troubleshoot equipment problems.
- Estimate costs and determine materials and equipment needed to make building and equipment repairs.
- Use manual and power tools and equipment safely.
- Make quick decisions in an emergency.
- Ensure the safe handling of hazardous items and materials.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Four (4) years of experience equivalent to a Facilities Maintenance Assistant with Santa Cruz METRO.

OR

One (1) year of journey-level experience in one of the following building trades: carpentry, electrical, plumbing, welding or painting. (Note: journey-level status typically requires four (4) years of formal training or apprenticeship).

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, crawl, kneel, crouch, and climb. Occasional lifting up to 50 pounds unaided may be required. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in a shop environment where the noise level is usually noisy. The employee may work outdoors in varied weather conditions with potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals. Work requires heavy physical labor and working in confined spaces.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.



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- Required to be able to respond to emergency situations seven days per week, 24 hours per day.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



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Class Code: Class Code
FLSA Status: Pending

Financial Analyst I **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Financial Analyst I performs a limited range of professional analytical duties related to centralized METRO budgetary and other financial functions, processes and projects; participates in the annual organization-wide budget process and prepares budget documents; researches, analyzes and forecasts trends related to budget, project, financial and accounting issues; participates in strategic planning activities related to projected revenues and expenditures; performs periodic and ongoing operational financial analysis and reporting; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Financial Analyst I is the first working-level class in the series. An incumbent in this class performs a limited range of professional financial analytical duties while learning to perform the full scope of work. This class may be distinguished from the higher-level class of Financial Analyst II because an incumbent in the latter class performs the full-scope of journey-level financial analytical work.

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.

- Performs a limited range of journey-level professional analyst duties to support centralized METRO budgetary and other financial functions, processes and projects, while learning to perform the full scope of journey-level financial analyst work.
- Participates in the annual organization-wide budget process; gathers information from various internal and external data sources; analyzes past trends; coordinates with department directors and budget support personnel to prepare departmental non-personnel budgets; develops the labor and fringe benefit budget projections; develops and prepares budget documents as assigned.
- Forecasts expenditures in accordance with current labor contracts, laws and economic conditions; develops budget revenue projections using statistical models, historical revenue and ridership data, as well as current economic indicators.
- Participates in the development of METRO's five and ten-year Strategic Plan; researches, analyzes and summarizes information for management consideration and planning; provides financial recommendations and forecasts.
- Writes monthly budget status reports; prepares presentations to inform the Board of Directors and the public regarding METRO's actual revenues and expenses in relation to the adopted operating and capital budgets.
- Assists in administering METRO's timekeeping software by providing and editing user access and security permissions, creating new pay policies and pay codes, auditing system outputs and coordinating with Information Technology staff to identify business needs and resolve technical problems.
- Calculates pay rates and maintains records of wage tables for all bargaining units and management classes for purposes of labor negotiations, wage surveys and classification and



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compensation studies; advises management on the operating cost impacts of potential labor contracts and service enhancement; prepares multi-year scenarios and forecasts.

- Prepares invoices and trust warrants for union-related payments and charges.
- Participates in the preparation of the annual budget book and automated budget tracking templates; uploads budget files for purchasing and accounting software.
- Coordinates and performs special projects.
- Develops and maintains a wide variety of financial records, reports, reporting tools and other documents; prepares correspondence; makes presentations to individuals and groups.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to attend meetings, conferences or trainings.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, forms and techniques of professional public sector finance, budgeting and accounting.
- Principles and best practices of public agency budgeting, including revenue forecasting and investing.
- Principles and practices of operational and financial research and analysis.
- Public sector best practices regarding record-keeping and reporting.
- Laws and regulations applicable to public sector finance, taxes, payroll reporting and transit agencies.
- Financial and statistical reporting and analysis.
- Business law principles and practices.
- Public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Project management methods.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including specialized financial applications.

Ability to:

- Plan, organize, coordinate, prepare and control budgets.
- Perform a wide variety of complex, professional financial analysis tasks and studies in compliance with applicable laws, regulations and policies.
- Evaluate, interpret and apply laws, regulations, policies, procedures and requirements pertaining to organizational financial activities.



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- Analyze complex financial, statistical, accounting and payroll information and formulate sound conclusions and recommendations.
- Assess economic conditions and determine economic assumptions for financial forecasts.
- Maintain complex financial and statistical data and records.
- Consult with and advise management on a wide variety of financial issues.
- Utilize financial and budgeting software, including spreadsheet, database, finance and payroll applications, at an advanced level.
- Apply professional fiscal control procedures to maintain budgetary accounts.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in finance, accounting, economics, business administration or a related field.

AND

Two (2) years of professional financial analytical experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must maintain strictest confidentiality of information.
- Must participate in professional development activities.
- May require occasional travel.

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.

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



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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 typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Financial Professional



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Class Code: Class Code
FLSA Status: Pending

Financial Analyst II **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Financial Analyst II performs professional analytical duties related to centralized METRO budgetary and other financial functions, processes and projects; plans and coordinates the annual organization-wide budget process and prepares budget documents; researches, analyzes and forecasts trends related to budget, project, financial and accounting issues; participates in strategic planning activities related to projected revenues and expenditures; performs periodic and ongoing operational financial analysis and reporting; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Financial Analyst II is the journey-level class in the series. An incumbent in this class performs the full-range of journey-level, professional analytical work to coordinate METRO budgetary functions and provide accurate and timely financial reports to management, other governmental agencies and the public. This class may be distinguished from the lower-level class of Financial Analyst I because an incumbent in the latter class performs a limited range of duties while learning to perform the full scope of journey-level work.

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.

- Plans and coordinates the annual organization-wide budget process; gathers information from various internal and external data sources; analyzes past trends; coordinates with department directors and budget support personnel to prepare departmental non-personnel budgets; develops the labor and fringe benefit budget projections; develops and prepares budget documents as assigned.
- Forecasts expenditures in accordance with current labor contracts, laws and economic conditions; develops budget revenue projections using statistical models, historical revenue and ridership data, as well as current economic indicators.
- Participates in the development of METRO's five and ten-year Strategic Plan; researches, analyzes and summarizes information for management consideration and planning; provides financial recommendations and forecasts.
- Writes monthly budget status reports; prepares presentations to inform the Board of Directors and the public regarding METRO's actual revenues and expenses in relation to the adopted operating and capital budgets.
- Assists in administering METRO's timekeeping software by providing and editing user access and security permissions, creating new pay policies and pay codes, auditing system outputs and coordinating with Information Technology staff to identify business needs and resolve technical problems.
- Calculates pay rates and maintains records of wage tables for all bargaining unit and management classes for purposes of labor negotiations, wage surveys and classification and compensation studies; advises management on the operating cost impacts of potential labor contracts and service enhancement; prepares multi-year scenarios and forecasts.



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- Prepares invoices and trust warrants for union-related payments and charges.
- Prepares the annual budget book and automated budget tracking templates; uploads budget files for purchasing and accounting software.
- Coordinates and performs special projects.
- Develops and maintains a wide variety of financial records, reports, reporting tools and other documents; prepares correspondence; makes presentations to individuals and groups.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to attend meetings, conferences or trainings.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles, practices, forms and techniques of professional public sector finance, budgeting and accounting.
- Advanced principles and best practices of public agency budgeting, including revenue forecasting and investing.
- Principles and practices of operational and financial research and analysis.
- Public sector best practices regarding record-keeping and reporting.
- Laws and regulations applicable to public sector finance, taxes, payroll reporting and transit agencies.
- Financial and statistical reporting and analysis.
- Business law principles and practices.
- Advanced public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Advanced methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Project management methods.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including specialized financial applications.

Ability to:

- Plan, organize, coordinate, prepare and control budgets.
- Coordinate and perform a wide variety of complex, professional financial analysis tasks and studies in compliance with applicable laws, regulations and policies.
- Evaluate, interpret and apply laws, regulations, policies, procedures and requirements pertaining to organizational financial activities.
- Analyze complex financial, statistical, accounting and payroll information and formulate sound conclusions and recommendations.



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- Assess economic conditions and determine economic assumptions for financial forecasts.
- Maintain complex financial and statistical data and records.
- Consult with and advise management on a wide variety of financial issues.
- Utilize financial and budgeting software, including spreadsheet, database, finance and payroll applications, at an advanced level.
- Apply advanced professional fiscal control procedures to maintain budgetary accounts.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in finance, accounting, economics, business administration or a related field.

AND

Five (5) years of professional financial analytical experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must maintain strictest confidentiality of information.
- Must participate in professional development activities.
- May require occasional travel.

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



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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 typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Financial Professional



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Class Code: Class Code
FLSA Status: Pending

Fleet Maintenance Supervisor **Bargaining Unit: PSA**

DEFINITION:

Under direction, a Fleet Maintenance Supervisor performs supervisory and skilled maintenance work related to the repair, alteration, and servicing of METRO vehicles and related equipment; supervises and evaluates assigned maintenance staff; coordinates and develops safety and training programs for assigned areas; develops, implements and supervises department record-keeping and information systems; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Fleet Maintenance Supervisor is a supervisory-level class. An incumbent in this class supervises and performs fleet maintenance, repair and renovation work for METRO vehicles to ensure the safe, clean and operational.

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.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Instructs and trains employees regarding improved work techniques and safety measures; recommends employees for training; evaluates training options; determines training required by Federal, State, and local laws and regulations; plans, assists and conducts training as appropriate.
- Plans, organizes and schedules the maintenance, repair, and alteration of METRO vehicles and related equipment; reviews, prioritizes and assigns work orders; estimates the supplies, equipment and hours needed for projects; ensures that staff has the resources needed to complete their work.
- Ensures that assigned areas comply with Federal, State, and local laws and regulations.
- Assists in the development of department policies, procedures, work standards, rules, and budgets; enforces METRO and department rules, regulations, policies, procedures, and work standards.
- Develops and implements record-keeping systems for vehicle maintenance, repairs, inspections, road calls, service, fuel consumption, and parts and labor costs; prepares periodic reports on maintenance activities and projects; monitors maintenance standards and performance in areas of oil/fuel analysis, road calls, labor costs, bus cleanliness, vehicle inspections, and shop safety; reviews repair work estimates.
- Develops, implements, and maintains a preventive maintenance program for transit vehicles; monitors vehicle failure trends and suggests corrective actions as needed.
- Solicits and receives quotes from outside vendors as needed to complete jobs.
- Monitors budgets as assigned; assists in departmental planning by projecting expenditures and determining staffing needs.



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- Participates in the diagnosis of the more complex mechanical failures and recommends solutions; assists in developing specifications for the purchase of equipment, vehicles, and tools.
- Represents the department at meetings; may serve as liaison to other departments, the public, and outside agencies; reviews, investigates, and responds to complaints regarding fleet mechanical or safety problems.
- Investigates vehicle accidents, prepares damage reports and reviews accident reports; determines mechanical problems and recommends corrective action; prepares employee injury reports.
- Ensures that proper safety practices and procedures are followed including the proper use of personal protective equipment (PPE).
- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents; answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Policies, procedures, rules, regulations, and labor contracts that affect employees.
- Techniques, procedures, equipment, tools, and materials used for the maintenance, repair, and service of transit vehicles, including buses.
- Preventive vehicle maintenance practices and methods.
- Mechanical, electrical, air, and hydraulic systems of transit buses and vehicles.
- Applicable Federal and State codes and regulations regarding buses, vehicles, and equipment, including employee safety requirements.
- Proper handling procedures for hazardous materials, health and safety regulations, safe work practices and proper equipment operating procedures.
- Safe operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Manual and automated record-keeping systems.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:



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- Supervise and motivate subordinate staff effectively.
- Provide safety-related and other training to staff and ensure a safe work environment.
- Read and interpret mechanical schematics and technical manuals.
- Diagnose and troubleshoot equipment problems.
- Learn and instruct others in the safe operation of the Alternative Fueling Facility.
- Estimate costs and determines materials and equipment needed to make vehicle repairs.
- Develop, write and implement operational procedures.
- Use manual and power tools and equipment safely.
- Make quick decisions in an emergency.
- Ensure the safe handling of hazardous items and materials.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Perform mathematical calculations, including ratios and percentages.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Five (5) years of progressively responsible experience in heavy-duty diesel and/or alternate fuel mechanic repair work and rebuilding diesel engines and related components. Experience must have also included at least three (3) years of supervisory or lead experience.

College-level coursework in business, transit management, hazardous materials technology, industrial technology, and/or behavioral science is desirable.

LICENSES AND CERTIFICATES:

A valid California Class B driver license with passenger endorsement and safe driving record are required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Driving record will be reviewed as part of the application process.

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.



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Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 75 pounds unaided is required. 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 detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually loud. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Required to be able to respond to emergency situations seven days per week, 24 hours per day.
- Required to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Maintenance



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Class Code: Class Code
FLSA Status: Pending

Grants/Legislative Analyst **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Grants/Legislative Analyst performs professional administrative work related to developing, preparing, and monitoring Federal, State and local grant applications and programs; ensures contract compliance related to grant projects; provides financial controls of grant-funded activities; performs legislative analysis and advocates legislative action; performs data analysis and comprehensive studies of policy issues; performs planning and programming activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Grants/Legislative Analyst is a journey-level professional analyst class. An incumbent in this class performs tasks requiring in-depth knowledge and interpretation of grant administration and legislative policy, laws, regulations and policies as well as the application of complex analytical thinking and methodologies to investigate and resolve difficult issues.

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.

- Administers policies and procedures in accordance with State, Federal, and organizational guidelines.
- Identifies and researches potential funding sources and strategies for METRO projects and programs.
- Administers grants from application to approval and subsequent reporting to the funding agency; prepares grant amendments, funding allocation requests, budget revisions, and requests for grant extensions; informs department managers and staff of regulations, requirements, procedures, and guidelines of programs to ensure compliance.
- Develops grant oversight plans, objectives, and strategies; determines appropriate implementation and monitors progress.
- Develops and maintains best practices related to the fiscal management of grants.
- Prepares project descriptions, justifications and other reports or documents to satisfy grant requirements; meets with and acts as a liaison to staff and officials at the Federal, State, and local levels to expedite the review and approval of grants; coordinates public hearing processes for grant programs.
- Develops and prepares grant applications and claims for agencies that are sub-recipients of grant funds from METRO; trains staff of sub-recipients regarding grant procedures and requirements; reviews submittals from sub-recipients and determines compliance with grant requirements.
- Assists in planning, developing, preparing and implementing capital project outlines, timetables, descriptions, and budgets; provides financial forecasts for grant programs; performs research, collects data, and prepares reports for planning, administrative, and financial purposes.
- Prepares transit planning and forecasting documents and assists in the preparation of the Short-Range Transit Plan.



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- Provides grant-specific training and support to the department.
- Researches, monitors, and reviews legislation, laws, rules, and regulations to ensure METRO compliance and recommend appropriate action.
- Oversees and coordinates the department's legislative agenda and works with management for input and needs.
- Represents METRO in legislative and intergovernmental activities with Federal, State, and local agencies; reviews, analyzes, and prepares bill summaries and makes recommendations on legislative proposals and bills; interprets policy and makes recommendations for compliance; contacts legislative representatives to ensure METRO's interests are represented.
- Develops and maintains a tracking system for monitoring approved and adopted legislation, policies and procedures.
- Analyzes and evaluates policy issues to identify and assess the impact of policy options and legislation on department programs and services.
- Maintains and provides clear, concise and accurate written reviews of pending, proposed and current legislation potentially affecting department operations.
- Identifies issues, trends, and problems of significance through legislative, governmental, cultural, and media analysis.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Laws and regulations applicable to grant administration and Federal, State, and local funding practices and procedures.
- Federal, State, and local legislative processes.
- Principles and practices of public administration, budgeting, accounting, financial planning and analysis, operations research and evaluation.
- The legislative process.
- Analytical methods of researching, gathering, organizing and reporting data, including basic statistical analysis.
- Modern office practices, procedures and equipment, including automated information systems.
- Business correspondence, formatting and report writing.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:



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- Analyze, interpret, explain, implement and enforce relevant policies, regulations and requirements.
- Define complex problems and develop solutions using analytical techniques.
- Understand implications of new information for current and future problem-solving and decision-making.
- Use logic and reasoning to identify strengths and weaknesses of proposals, alternatives, and conclusions, and to determine policy compliance of proposals.
- Identify issues for legal review.
- Plan, organize and/or prepare research and analytical studies including complex, multi-phased projects and programs.
- Research, collect, analyze and interpret data and prepare comprehensive reports of findings and recommendations.
- Establish and maintain complex records and systems requiring confidentiality and security.
- Provide effective and responsive customer service, including in stressful situations.
- Negotiate solutions to difficult issues.
- Work independently using good judgment, tact and discretion.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in planning, political science, economics, public administration, or a related field.

AND

Four (4) years of professional experience in a transportation agency that included grant writing, planning, governmental relations, legislative affairs, research and analysis.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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 detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Professional



Attachment C

Class Code: Class Code
FLSA Status: Pending

Human Resources Analyst **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Human Resources Analyst performs professional analytical duties related to Human Resources (HR) Department functions and processes, including recruitment, selection, classification, compensation, employee development, employee relations, regulatory compliance and Human Resource Information System (HRIS) development/administration; assists HR management in planning, organizing and achieving departmental objectives; provides professional advice and assistance to METRO management on personnel-related issues; may supervise subordinate clerical and/or technical support staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Human Resources Analyst is a journey-level professional analyst class. An incumbent in this class performs tasks that require in-depth knowledge and interpretation of personnel-related laws, regulations and policies as well as the application of complex analytical thinking and methodologies to investigate and resolve difficult issues.

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.

- Performs professional analytical duties to support HR functions and processes including recruitment, selection, classification, compensation, employee development, employee relations, regulatory compliance, records management and Human Resource Information System (HRIS) development and administration; assists the Human Resources Director and Human Resources Deputy Director in planning, organizing and achieving departmental objectives; provides professional advice and assistance to METRO management on personnel-related issues.
- Coordinates with Information Technology (IT), Finance and Payroll staff to ensure that HRIS data is appropriately maintained and updated; ensures that position control and payroll data is correct and integrating properly with other systems; assists IT staff in testing and implementing HRIS upgrades and patches; prepares and develops HRIS reports and reporting tools; defines pre-defined queries; performs HRIS audits, wage audits, recruitment audits and system interface audits; identifies and resolves deficiencies; works with IT staff as needed.
- Serves as the Human Resources business process expert to communicate end-user requirements to the HRIS vendor as well as IT staff; assesses available options and recommends system customizations and new applications; trains HR staff and HRIS end-users by developing training materials and providing instruction on how to perform duties more efficiently using HRIS.
- Prepares and administers the HR budget by opening purchase orders, processing payments, tracking expenditures and recommending adjustments/transfers; prepares technical procurement documents such as requests for proposals, bids and training material.
- Assists in planning, administering and implementing METRO's Equal Employment Opportunity Plan, including data collection, analysis and reporting.



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- Oversees day-to-day HR operational activities; evaluates operational effectiveness and efficiency and recommends changes as needed; ensures compliance with industry standards and legal requirements; develops, revises and analyzes HR policies and procedures.
- Administers step increase and longevity pay plans to ensure compliance with collective bargaining agreements; reviews personnel action documents and routes for approval; processes compensation changes into HRIS by updating reference tables and ensuring compliance with negotiated agreements.
- Develops and conducts recruitment and related outreach activities including strategic planning, advertising analysis and placement, and examination development and administration; resolves various complex inquiries and issues; screens employment applications, develops and administers examinations, and certifies eligibility lists; responds to inquiries regarding recruitment status.
- Assists with conducting job analyses, evaluations and classification studies; writes classification specifications and conducts salary surveys; compiles and analyzes compensation data.
- Works with supervisory and management staff to review medical conditions for possible accommodation; assists in conducting the interactive process, implementing reasonable accommodations, and monitoring the effectiveness of accommodations.
- May perform labor relations activities such as investigating employee grievances, discrimination complaints and possible policy violations.
- May assist with benefits-related administrative and analytical activities and serve as a back up to the Benefits Administrator.
- Performs analytical research and prepares reports findings and recommendations; composes a variety of complex narrative and statistical documents including procedures, procedure manuals, and other technical documents.
- May supervise subordinate technical, clerical and/or other support staff by scheduling, assigning, directing and evaluating their work; provides staff training as needed; may perform and/or have significant input into staff selection and disciplinary action.
- Oversees the organization and maintenance of confidential HR materials, records, files and other privileged information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to attend meetings, conferences, or perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of public administration including planning, organizational development, systems administration, finance, purchasing and staff development.
- Principles and practices of public human resources management including merit-based recruitment and staff selection, training, equal employment opportunity, benefits administration, classification, job analysis, safety and risk management.
- Laws and regulations applicable to public human resources management.
- Principles of pay equity and compensation management.
- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Analytical methods of researching, gathering, organizing and reporting data.
- Modern office practices, procedures and equipment, including automated human resources information systems.



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- Business correspondence, formatting and report writing.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze, interpret, explain, implement and enforce human resources policies, regulations and requirements.
- Define complex problems and develop solutions using analytical techniques.
- Plan, organize and/or prepare research and analytical studies including complex, multi-phased projects and programs.
- Research, collect, analyze and interpret data and prepare comprehensive reports of findings and recommendations.
- Establish and maintain complex records and systems requiring confidentiality and security.
- Provide effective and responsive customer service, including in stressful situations.
- Negotiate solutions to difficult issues.
- Work independently using good judgment and discretion.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Bachelor's degree from an accredited college or university with major study in business, public administration or a related field.

AND

Two (2) years of professional human resources analytical experience, preferably in a public agency.

Familiarity with transit agency or transportation system activities and functions is desirable.

Experience administering a Human Resources Information System is desirable.

Master's degree is desirable.



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LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certified Professional (CP) or Senior Certified Professional (SCP) from a recognized Human Resource Certification organization such as IPMA-HR, SHRM, or HRCI is desirable.

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 typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.
- Must maintain strict confidentiality of work-related information.
- Must participate in professional development activities.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Professional



Attachment C

Class Code: Class Code
FLSA Status: Pending

Human Resources Clerk **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Human Resources Clerk performs clerical duties to support Human Resources (HR) Department functions and processes; assists higher-level staff with administrative tasks related to recruitment, benefits, workers' compensation or other human resources functions; maintains detailed records of computerized and hard copy files; gathers and compiles data for statistical or financial reports; provides information to employees and the public as authorized; types, files and performs general office work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Human Resources Clerk is a journey-level clerical class. An incumbent in this class performs clerical human resources support tasks of average difficulty that require some knowledge and application of HR policies, practices and procedures. This class may be distinguished from the higher-level class of Human Resources Specialist because an incumbent in the latter class performs advanced-level clerical duties related to workers' compensation administration and/or other specialized HR functions.

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.

- Performs data entry to update and maintain the computerized METRO Human Resources Information System (HRIS); maintains information related to personnel actions such as change of status, hours worked, performance reviews, step advancements, and other human resources activities.
- Prepares employee identification cards; distributes bus passes and annual bus stickers; maintains related records and files.
- Receives and processes routine financial documents, including invoices and bills; prepares payment authorizations, requisitions, and check requests; maintains and orders supplies.
- Compiles and prepares data for statistical reports, including EEO and salary surveys.
- Schedules and coordinates interviews; prepares interview packets.
- Maintains and updates mailing lists.
- Composes and/or types various department memos, letters, reports, statistical data, and correspondence as directed.
- Performs telephone employment verifications.
- Maintains and updates personnel and/or benefit files by inserting and extracting information; handles confidential materials, records, files and other privileged information.
- Answers telephones, greets visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- May coordinate employee medical exams and assist with employee orientations.
- May verify applicant identity and employment eligibility by gathering and reviewing documentation.



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- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures and equipment.
- Basic clerical processes pertaining to accounting, purchasing and data maintenance.
- Basic methods of maintaining information in computerized or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Maintain detailed records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Type finished copy from rough draft or machine transcription.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Type at a corrected rate of 50 words per minute from clear copy.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 clerical experience requiring the operation of personal computers, database systems, typing and maintaining detailed recordkeeping systems.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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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 stooping at the waist and the repetitive use of both hands to grasp and feel objects and. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Human Resources Specialist **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Human Resources Specialist performs advanced clerical duties to support one or more specialized Human Resources (HR) Department functions and processes; reviews and processes workers' compensation claims and reports and assists with the administration of the workers' compensation program; serves as a liaison to insurance carriers, claims representatives, contractors and others; assists higher-level staff with administrative tasks involving recruitment, benefits, or other HR functions; may serve as a lead worker over subordinate support staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Human Resources Specialist is an advanced-level clerical class. An incumbent in this class performs clerical human resources support tasks of above-average difficulty that require substantial knowledge and application of specialized human resources policies, practices and procedures. This class may be distinguished from the lower-level class of Human Resources Clerk because an incumbent in the latter class performs journey-level clerical duties. It can also be distinguished from the higher-level class of Human Resources Technician because an incumbent in the latter class performs journey-level human resources technical duties.

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.

- Reviews and processes workers' compensation claim forms and related documents; may train METRO employees on proper completion of injury reports and related documents.
- Assists in monitoring workers' compensation cases from inception to final disposition; prepares and maintains workers' compensation logs, posters, reports, notices and related records and materials; assists management in maintaining regulatory compliance in the workers' compensation program.
- Acts as liaison with other METRO departments, the workers' compensation claims administrator, insurance carriers, contractors and others; assists in preparing proposals, bid specifications and other technical documents.
- Assists in the development and maintenance of automated databases for workers' compensation claims; runs queries to compile data and prepares requested reports.
- Assists in the preparation of the workers' compensation budget and/or other departmental budgets; monitors claim payments and other administrative expenses; audits, reviews, corrects and prepares statements from workers' compensation contractors and providers.
- Provides information to supervisors and employees regarding workers' compensation; monitors employee absences for potential impact on benefits.
- Performs data entry to update and maintain the computerized METRO Human Resources Information System (HRIS); maintains information related to personnel actions such as change of status, hours worked, performance reviews, step advancements, and other HR activities.



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- Assists in conducting recruitment and testing activities; responds to inquiries regarding job openings and recruitment status; assists in maintaining employee benefit records as needed.
- May serve as a lead worker over subordinate clerical or other support staff by prioritizing, assigning and monitoring their work and providing training as needed.
- Maintains confidential materials, records, files and other privileged information.
- Monitors departmental expenditures; prepares payment authorizations.
- Initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents; writes, updates and maintains department procedure manuals.
- Answers telephones, greets visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures and equipment.
- General laws, regulations, procedures and practices pertaining to workers' compensation claims processing as well as other specialized human resources activities.
- Clerical processes pertaining to accounting, purchasing and data maintenance.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in computerized or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Interpret, explain and apply human resources policies, procedures and regulations.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Type finished copy from rough draft or machine transcription.
- Lead and motivate subordinate staff.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Type at a corrected rate of 50 words per minute from clear copy.
- Work independently using good judgment, tact and discretion.



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- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Four (4) years of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining detailed recordkeeping systems. Experience must also have included at least two (2) years in a centralized human resources organization.

Experience reviewing and processing workers' compensation claims is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects and. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.



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*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Human Resources Technician **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Human Resources Technician performs technical administrative duties to support Human Resources (HR) Department functions and processes; coordinates, organizes and conducts technical recruitment activities; coordinates onboarding processes for new employees; schedules and conducts new employee orientations; maintains confidential employee records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Human Resources Technician is the journey-level class in the series. An incumbent in this class performs tasks that require interpretation and application of specialized HR policies to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the lower-level class of Human Resources Specialist because an incumbent in the latter class performs advanced clerical duties. It can also be distinguished from the higher-level class of Human Resources Analyst because an incumbent in the latter class performs journey-level professional human resources work.

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.

- Coordinates, organizes and conducts technical recruitment activities following established procedures.
- Processes position requisitions; assembles job fliers; drafts advertisements and promotional materials; coordinates the production and distribution of job announcements and the placement of job posting advertisements.
- Receives and screens applications for minimum qualifications; prepares and organizes applications for management review; coordinates testing processes by scheduling proctors and arranging interview panels; tabulates applicant scores and prepares eligibility lists.
- Assists hiring departments by arranging selection interviews and communicating with applicants; as authorized, sends offers of employment and schedules pre-employment drug screening, fingerprinting and medical examinations; coordinates new employee onboarding processes.
- Schedules new employee orientation and prepares hiring packets; conducts orientation presentations as assigned.
- Coordinates recruitment and hiring of temporary help through outside employment agencies.
- Assists with benefits administration by reviewing payroll reports for errors; verifies that proper health and life insurance deductions have been taken; notifies employees of errors and monies owed; creates payroll deduction forms for payroll; collects checks and provides to Finance.
- May perform technical duties related to other HR activities such as workers' compensation, benefits, and leave administration; may assist with classification and compensation studies and surveys; may respond to employment verification inquiries.
- Updates and maintains information in the computerized METRO Human Resources Information System (HRIS); may assist in processing personnel actions to adjust job status, hours worked,



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performance reviews, step advancements, and other changes; conducts HRIS queries and prepares regular and periodic reports for management as requested; maintains various logs and lists.

- Performs technical research and prepares summaries of findings; initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents; writes, updates and maintains department procedures and procedure manuals.
- Coordinates and/or participates in job fairs and other recruitment outreach activities.
- Maintains confidential materials, records, files and other privileged information.
- May monitor departmental expenditures; may prepare payment authorizations.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Technical principles, practices and procedures common to public employment, including recruitment, testing and selection.
- Basic laws and regulations applicable to public personnel management, including equal employment opportunity and merit-based selection.
- Modern office practices, procedures and equipment, including automated human resources information systems.
- Technical processes pertaining to accounting, purchasing, and data maintenance.
- Business correspondence, formatting and report writing.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Evaluate, interpret and apply human resources policies, regulations and requirements as they apply to technical employment-related activities.
- Coordinate and perform technical human resources activities in a manner that complies with applicable laws, regulations and policies.
- Work independently using good judgment, tact and discretion.
- Review and screen documents for minimum qualifications or other requirements.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.



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- Interpret, explain and apply human resources policies, procedures and regulations.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent quarter) units at an accredited college with coursework in human resources management, industrial relations, public administration, business administration, or a related field.

AND

Two (2) years of progressively responsible clerical experience in a centralized human resources organization.

Experience in a public agency is desirable.

Experience performing employee recruitment activities is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects and. 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



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

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Information Technology Technician I **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Information Technology Technician performs a limited range of technical computer support work while learning to perform the full scope of journey-level work; performs system backups; resolves user's technical support questions; receives, tests and installs networked and personal computers and related equipment; performs maintenance, troubleshooting and repair on computer hardware and routine user issues; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Information Technology Technician I is the first working-level class in the series. An incumbent in this class performs a limited range of hardware and software maintenance and user support tasks. This class is distinguished from the higher-level class of Information Technology Technician II because an incumbent in the latter class performs the full-range of journey-level work.

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.

- Provides routine user support utilizing an established tracking system for help desk requests; responds to inquiries through the tracking system and over the phone; monitors and tracks problems and their resolution; identifies patterns of failure and applies knowledge of computer software and hardware procedures to implement solutions and diagnostic procedures.
- Performs routine system backup operations; performs the more routine installation, repair, and maintenance work on computers, printers, network hardware, switches, routers, and cabling; troubleshoots routine hardware problems and replaces failed components; installs technology systems and equipment in a proper and safe manner.
- Assists in developing and writing user procedure manuals; teaches basic system operational procedures such as login and e-mail access; assists in configuring basic user environments to meet individual needs.
- Assists with inventory control of computer parts.
- Participates in assembling and testing new systems; assists with unloading, asset tagging, documenting and installing new computer equipment and removing, storing, and disposing of obsolete computer equipment.
- Assists with installing new application software as well as system hardware and software upgrades.
- Learns to perform user-level administration of Windows Active Directory (AD) and Exchange.
- Assists in monitoring Windows servers, NIX operational systems and networks; performs routine configuration maintenance; troubleshoots routine operation and configuration issues and tests system stability; performs reset, recovery and backup procedures.
- Assists third party vendors with installations, upgrades, and application maintenance; helps with application troubleshooting, diagnostics, communication, and resolution.
- Assists with maintaining, monitoring and supporting transit ticketing systems including hardware, installations, upgrades, equipment, and applications.



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- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Workplace safety issues related to the use of computers.
- Basic Microsoft Windows and NT.
- Basic NIX commands, scripting language, and protocols.
- Basic networking protocols (TCP/IP, DNS routing, switching, subnets, firewalls).
- Basic Microsoft Office application software including Word and Excel.
- Basic UNIX OS.
- Basic hardware technology.
- Basic remote access technologies.
- Basic anti-virus technologies.
- Basic security protocols.

Ability to:

- Clearly and effectively present technical information to both technical and non-technical users.
- Read and interpret technical manuals, procedures, and instructions.
- Troubleshoot and diagnose system and application problems in order to maintain system operation.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent) units from an accredited college with coursework in computer science.

AND

Two (2) years of technical computer support experience. Experience providing customer support using a help desk ticket tracking system is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Information Technology Technical



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Class Code: Class Code
FLSA Status: Pending

Information Technology Technician II **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Information Technology Technician performs journey-level technical computer support work; performs system backups; resolves user's technical support questions; receives, tests and installs networked and personal computers and related equipment; performs maintenance, troubleshooting, and repair on computer hardware and routine user issues; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Information Technology Technician II is the journey-level class in the series. An incumbent in this class provides user technical support as well as hardware and software maintenance of a routine nature. This class is distinguished from the lower-level class of Information Technology Technician I because an incumbent in the latter class performs a limited range of technical support duties while learning to perform the full-range of journey-level work.

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.

- Provides user support utilizing an established tracking system for help desk requests; responds to inquiries through the tracking system and over the phone; monitors and tracks problems and their resolution; identifies patterns of failure and applies knowledge of computer software and hardware procedures to implement solutions and diagnostic procedures.
- Installs, repairs, and maintains computers, printers, network hardware, switches, routers, and cabling; troubleshoots routine hardware problems and replaces failed components; installs technology systems and equipment in a proper and safe manner.
- Assists in developing and writing user procedure manuals; teaches basic system operational procedures such as login and e-mail access; assists in configuring basic user environments to meet individual needs.
- Coordinates inventory control of computer parts; maintains supplies inventory.
- Participates in the assembly and testing of new systems; coordinates the unloading, asset tagging, documentation and installation of new computer equipment and the removal, storage, and disposition of obsolete computer equipment.
- Installs new application software as well as system hardware and software upgrades.
- Performs user-level administration of Windows Active Directory (AD) and Exchange; creates, maintains, monitors and troubleshoots user accounts, logins, email, and security; sets access security.
- Assists in building and monitoring Windows servers, NIX operational systems, and networks; performs routine configuration maintenance; troubleshoots routine operation and configuration issues and tests system stability; performs reset, recovery and backup procedures.
- Assists third party vendors with installations, upgrades, and application maintenance; helps with application troubleshooting, diagnostics, communication, and resolution.



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- Maintains, monitors and supports transit ticketing systems including hardware, installations, upgrades, equipment, and applications.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Microsoft Windows and NT.
- NIX commands, scripting language, and protocols.
- Networking protocols (TCP/IP, DNS routing, switching, subnets, firewalls).
- Microsoft Office application software including Word and Excel.
- UNIX OS
- Current hardware technology.
- Workplace safety issues related to the use of computers.
- Remote access technologies.
- Anti-virus technologies.
- Security protocols.

Ability to:

- Clearly and effectively present technical information to both technical and non-technical users.
- Read and interpret technical manuals, procedures, and instructions.
- Troubleshoot and diagnose system and application problems in order to maintain system operation.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent) units from an accredited college with coursework in computer science.

AND

Three (3) years of technical computer support experience. Experience must have included at least one (1) year providing customer support using a help desk ticket tracking system.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the



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time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Information Technology Technical



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Class Code: Class Code
FLSA Status: Pending

Legal Secretary **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Legal Secretary performs specialized clerical and secretarial work in the Office of the General Counsel; prepares and processes legal documents, obtains or provides and confidential information; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Legal Secretary is a journey-level class. An incumbent in this class performs the full range of complex legal secretarial support work. The emphasis of the work may vary, depending upon assignment, but all work requires knowledge of legal clerical processes and independent decision-making within established guidelines.

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.

- Transcribes complex legal dictation or written notes using a computer; types a wide variety of legal documents in the proper format including legal pleadings, briefs, correspondence, subpoenas, motions, ordinances, resolutions, petitions, and contracts.
- Abstracts information from various sources and puts into proper legal form; opens, maintains, monitors and closes legal case files; maintains correspondence and records files.
- Maintains attorney appointment calendars; maintains a calendar of important court dates; files legal documents with courts as required.
- Tracks the receipt of and response to complaints; assists staff in ensuring timely responses.
- Takes and transcribes minutes of meetings as assigned.
- Screens phone calls; assists callers by providing information as authorized; exercises considerable judgment and discretion in dealing with sensitive and confidential matters.
- Serves as a primary point of contact for the General Counsel's office;
- Maintains confidential materials, records, files, and other privileged information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax machine, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- May serve as a lead worker over subordinate clerical or other support staff by prioritizing, assigning and monitoring their work and providing training as needed.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Legal forms, formats, documents, and terminology.
- Legal office procedures and practices.
- Modern office practices, procedures, and equipment.



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- Clerical processes pertaining to accounting, purchasing and data maintenance.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Prepare legal documents that may require abstracting pertinent information from files and records using accepted formats and construction.
- Type finished copy from rough draft or machine transcription.
- Type at a corrected rate of 50 words per minute from clear copy.
- Maintain confidentiality of materials, records, files and other privileged information using tact, and discretion.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Lead and motivate subordinate staff.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of legal secretarial experience. Formal legal secretarial training or paralegal training or experience may substitute for up to one (1) year of the required experience.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Legal Clerical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Mechanic I **Bargaining Unit: VMU**

DEFINITION:

Under general supervision, a Mechanic I performs a limited range of semi-skilled maintenance duties related to the repair and maintenance of METRO buses, vehicles, and other equipment while learning to perform the full scope of journey-level work; provides technical direction and assistance to lower level staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Mechanic I is the first working-level class in the series. An incumbent in this class performs routine a limited range of semi-skilled tasks related to the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other equipment. This class is distinguished from the higher-level class of Mechanic II because in incumbent in the latter class performs the full scope of journey-level mechanic work.

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.

- Performs a limited range of semi-skilled tasks in the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other METRO vehicles and equipment and provides assistance to higher-level Mechanics.
- Removes and replaces seats and glass for doors and windows.
- Removes, installs and repairs electronic fare boxes, exterior advertising signs, and bike racks.
- Inspects, adjusts and repairs and/or replaces brakes; removes and installs tires.
- Performs safety and preventative maintenance inspections as required.
- Lubricates chassis, changes transmission and engine fluids and filters; inspects, removes, and replaces hoses and belts, bulbs and wiper blades.
- Learns to inspect equipment for needed repairs and to identify the parts, materials and time needed to conduct needed maintenance or repairs.
- Assists higher-level mechanics with repairing and adjusting compressed natural gas (CNG), diesel and gasoline engines, transmissions, and other vehicle systems and components; assists with maintaining, diagnosing, inspecting, and repairing CNG and diesel supply tanks, fuel delivery systems and related components.
- Learns to inspect, diagnose and repair vehicle electrical systems.
- Learns to inspect, reline and adjust brakes; remove and install tires; perform wheel alignments; and perform other vehicle maintenance tasks.
- May assist with emergency repair road calls.
- Learns to recognize potential safety hazards and make appropriate recommendations to higher-level staff.
- Fuels METRO equipment including gasoline, diesel and CNG vehicles.
- Maintains METRO property, tools, and equipment used in vehicle maintenance.
- Maintains a clean work area.



Attachment C

- Maintains accurate written and electronic records, logs and work orders.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic principles, practices, methods, equipment, materials, tools and procedures used in the maintenance, service, and repair of automotive and heavy-duty engine operation.
- Safe mechanical work practices.
- Basic vehicle and equipment overhaul and repair procedures.
- Engine tune-up procedures.
- Basic electrical and hydraulic systems.
- Proper use of hand, electric, pneumatic, and hydraulic tools and diagnostic equipment.
- Welding and oxygen-acetylene equipment used in the routine repair, maintenance, and service of vehicles.
- Standard electronic diagnostic equipment.
- Basic air brake systems.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Perform routine, semi-skilled duties related to the maintenance, repair, and alteration of fleet vehicles and equipment.
- Understand and follow oral and written instructions.
- Read and interpret technical manuals and schematics.
- Learn to diagnose and troubleshoot equipment problems.
- Operate welding equipment, brake drum lathes, drill presses, diagnostic equipment and other tools and equipment used in the repair, maintenance, and service of vehicles.
- Use manual and power tools and equipment safely.
- Learn to estimate costs and determines the materials and equipment needed to make vehicle and equipment repairs.
- Handle hazardous items and materials safely.
- Apply safe work practices and procedures around extremely high pressure and flammable CNG fuel.
- Make quick decisions in an emergency.
- Maintain records and control systems with accuracy and attention to detail.



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- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

One (1) year of progressively responsible experience performing heavy-duty mechanic work.

OR

Two (2) years of progressively responsible experience performing light-duty automotive repair work.

OR

Graduation from a certified maintenance training program (or program meeting METRO standards) AND six (6) months of experience performing mechanic work.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

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



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While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Mechanic II **Bargaining Unit: VMU**

DEFINITION:

Under general supervision, a Mechanic II performs skilled, journey-level maintenance work related to the repair and maintenance of METRO buses, vehicles, and other equipment; provides technical direction and assistance to lower level staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Mechanic II is the journey-level class in the series. An incumbent in this class performs a wide range of moderately difficult tasks related to mechanical maintenance, repair, and modification of buses, automobiles, trucks and other equipment. This class is distinguished from the lower-level class of Mechanic I because an incumbent in the latter class performs a limited range of routine tasks while learning to perform the full scope of journey-level work. This class may be distinguished from the higher-level class of Mechanic III because an incumbent in the latter class performs highly-skilled and very difficult mechanic work requiring more diagnostic skill and longer repair times.

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.

- Performs a variety of skilled tasks in the mechanical maintenance, repair and modification of buses, automobiles, trucks and other METRO vehicles and equipment.
- Inspects equipment for needed repairs; determines parts, materials and time needed to conduct needed maintenance or repairs; determines whether parts are in stock or must be ordered; requisitions or otherwise requests needed parts and materials to perform work.
- Performs semi-major overhauls under the direction of higher-level staff; repairs and adjusts compressed natural gas (CNG), diesel and gasoline engines, transmissions, and other vehicle systems and components; maintains, diagnoses, inspects, and repairs CNG and diesel supply tanks, fuel delivery systems and related components.
- Inspects, diagnoses and repairs vehicle electrical systems.
- Inspects, relines and adjusts brakes; removes and installs tires; performs wheel alignments; and performs other vehicle maintenance tasks.
- Performs safety and preventative maintenance inspections as required.
- May respond to and/or assist with emergency repair road calls.
- Recognizes potential safety hazards and makes appropriate recommendations to higher-level staff.
- Fuels METRO equipment including gasoline, diesel and CNG vehicles.
- Maintains METRO property, tools, and equipment used in vehicle maintenance.
- Maintains a clean work area.
- Maintains accurate written and electronic records, logs and work orders.
- Provides technical direction and assistance to lower level staff.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.



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- Operates standard office equipment including a computer, typewriter, photocopier machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, methods, equipment, materials, tools and procedures used in the maintenance, service, and repair of transit diesel, spark-ignited and CNG engine operation.
- Vehicle and equipment overhaul and repair procedures.
- Diesel, gasoline and CNG engine tune-up procedures.
- Electrical and hydraulic system repairs.
- Air brake system repairs.
- Safe mechanical work practices.
- Proper use of hand, electric, pneumatic, and hydraulic tools and diagnostic equipment.
- Welding and oxygen-acetylene equipment used in the repair, maintenance, and service of vehicles.
- Standard electronic diagnostic equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Perform a wide variety of duties related to the maintenance, repair, and alteration of fleet vehicles and equipment.
- Understand and follow oral and written instructions.
- Read and interpret technical manuals and schematics.
- Diagnose and troubleshoot equipment problems.
- Operate welding equipment, brake drum lathes, drill presses, diagnostic equipment and other tools and equipment used in the repair, maintenance and servicing of vehicles.
- Use manual and power tools and equipment safely.
- Estimate costs and determines the materials and equipment needed to make vehicle and equipment repairs.
- Ensure the safe handling of hazardous items and materials.
- Apply safe work practices and procedures around extremely high pressure and flammable CNG fuel.
- Make quick decisions in an emergency.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Provide technical direction and training to less skilled staff.
- Adhere to established work schedules and timelines.



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- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of progressively responsible experience equivalent to a Mechanic I with Santa Cruz METRO.

OR

Three (3) years of progressively responsible experience performing heavy-equipment mechanic work.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands



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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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Mechanic III **Bargaining Unit: VMU**

DEFINITION:

Under general supervision, a Mechanic III performs advanced and highly skilled maintenance work related to the repair and maintenance of METRO buses, vehicles, and other equipment; provides technical direction and assistance to lower level staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Mechanic III is the specialist-level class in the series. An incumbent in this class performs highly skilled and very difficult maintenance, repair, and modification of buses, automobiles, trucks and other equipment. This class is distinguished from the lower-level class of Mechanic II because an incumbent in the latter class performs journey-level work that requires less diagnostic skill and shorter repair times. This class may also be distinguished from the higher-level class of Senior Mechanic because an incumbent in the latter class serves as a lead worker over subordinate Mechanic 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.

- Performs a variety of highly-skilled and difficult tasks in the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other METRO vehicles and equipment.
- Inspects equipment for needed repairs; determines parts, materials and time needed to conduct needed maintenance or repairs; determines whether parts are in stock or must be ordered; requisitions or otherwise requests needed parts and materials to perform work.
- Performs major engine and vehicle system overhauls; repairs and adjusts compressed natural gas (CNG), diesel and gasoline engines, transmissions, and other vehicle systems and components; maintains, diagnoses, inspects, and repairs CNG and diesel supply tanks, fuel delivery systems and related components.
- Inspects, diagnoses and repairs vehicle electrical systems.
- Inspects, relines and adjusts brakes; removes and installs tires; performs wheel alignments; and performs other vehicle maintenance tasks.
- Performs safety and preventative maintenance inspections as required.
- Responds to emergency repair road calls.
- Recognizes potential safety hazards and makes appropriate recommendations to higher-level staff.
- Fuels METRO equipment including gasoline, diesel, and CNG vehicles.
- Maintains METRO property, tools, and equipment used in vehicle maintenance.
- Maintains a clean work area.
- Maintains accurate written and electronic records, logs and work orders.
- Provides technical direction and assistance to lower level staff.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.



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- Operates standard office equipment including a computer, typewriter, photocopier machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles, practices, methods, equipment, materials, tools and procedures used in the maintenance, service, and repair of transit diesel, spark-ignited and CNG engine operation.
- Advanced vehicle and equipment overhaul and repair procedures.
- Advanced diesel, gasoline and CNG engine tune-up procedures.
- Advanced electrical and hydraulic system repairs.
- Advanced air brake system repairs.
- Safe mechanical work practices.
- Proper use of hand, electric, pneumatic, and hydraulic tools and diagnostic equipment.
- Welding and oxygen-acetylene equipment used in the repair, maintenance, and service of vehicles.
- Standard electronic diagnostic equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Perform highly-skilled and difficult duties related to the maintenance, repair, and alteration of fleet vehicles and equipment.
- Read and interpret complex technical manuals and schematics.
- Diagnose and troubleshoot complex equipment problems.
- Operate welding equipment, brake drum lathes, drill presses, diagnostic equipment and other tools and equipment used in the repair, maintenance and service of vehicles.
- Use manual and power tools and equipment safely.
- Estimate costs and determines the materials and equipment needed to make vehicle and equipment repairs.
- Ensure the safe handling of hazardous items and materials.
- Apply safe work practices and procedures around extremely high pressure and flammable CNG fuel.
- Make quick decisions in an emergency.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Provide technical direction and training to less skilled staff.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.



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- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of progressively responsible experience equivalent to a Mechanic II with Santa Cruz METRO.

OR

Four (4) years of progressively responsible experience performing heavy-duty mechanic work. Experience must have also included rebuilding and repairing CNG, and/or diesel engines and related units and assemblies.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.



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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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Paralegal **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Paralegal performs legal technical work for the General Counsel; assists Counsel in preparing for litigation; performs legal research; interviews witnesses; assists with the preparation of legal documents; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Paralegal is the journey-level class in the series. An incumbent in this class performs a wide variety of technical legal activities under the supervision of an attorney, exercising considerable independent judgment in making decisions based on legal guidelines, processes or requirements. This class is distinguished from the higher-level class of Senior Paralegal because an incumbent in the latter class performs advanced paralegal work requiring specialized knowledge of complex human resources-related functions, policies and procedures.

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.

- Assists in the preparation of legal documents such as briefs, memos, settlement documents, resolutions, and ordinances; and performs research and prepares draft legal opinions.
- Researches, studies, and applies statutes, case law, legislation, and other legal authorities for use in the preparation of cases, opinions, pleadings, briefs, and other documents.
- Prepares questions and interviews witnesses; prepares METRO witnesses for depositions; prepares deposition summaries.
- Confers with METRO Counsel, investigators, employees, and other individuals regarding legal matters.
- Attends court and other legal forums with METRO Counsel as required.
- Files documents with courts, including reports, petitions, motions, briefs, ordinances, and other legal documents.
- Ensures all required documents and notices are filed or sent out within deadlines.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, methods, materials, and practices of legal research.
- Statutes and codes applicable to civil proceedings and claims.
- Legal document formats and filing procedures.
- Hearing procedures and rules of evidence.
- Preparation of routine procedural and substantive civil litigation.



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- Applicable court rules, including drafting and responding to pleadings.
- Pleading formats, citation style, content requirements, and local filing requirements.
- Civil litigation calendar management.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting legal information.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Draft legal documents such as briefs, memos, ordinances, and resolutions.
- Research, analyze, and apply legal principles, facts, evidence, and precedents to legal issues.
- Perform legal research.
- Communicate and present statements of fact, law, and argument clearly, logically and effectively.
- Interview and interact with the public, outside attorneys and METRO employees regarding discovery, case investigation, and trial preparation.
- Interpret, explain and apply laws, regulations, policies, and procedures.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Paralegal certificate from an accredited school.

AND

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Two (2) years of experience as a paralegal, legal assistant or legal secretary.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Legal Technical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Paratransit Eligibility Coordinator **Bargaining Unit: SEA**

DEFINITION:

Under general direction, a Paratransit Eligibility Coordinator performs professional duties related to Americans with Disabilities Act (ADA) paratransit eligibility functions; determines customer eligibility for METRO paratransit services; conducts outreach to and educates the community, potential applicants and their families regarding available METRO paratransit and accessible services, consistent with the transportation provisions of the ADA; coordinates the ADA Paratransit Certification program; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Paratransit Eligibility Coordinator is a journey-level professional class. An incumbent in this class performs tasks related to METRO's paratransit eligibility functions, ensuring compliance with applicable laws and policies.

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.

- Coordinates and performs eligibility determination for METRO paratransit services including passenger certification, appeals, and recertification services in compliance with legal requirements and METRO policies; maintains up-to-date knowledge of applicable laws and policies.
- Monitors performance of contractor(s), ensuring full compliance with Federal ADA standards, established policies and procedures, and specific contractual terms; completes performance reviews and recommends appropriate action as needed.
- Performs data collection for performance measurements; reviews adequacy of service policies and procedures; and assists in the review of the impacts of potential service changes.
- Maintains detailed and accurate records of all eligibility determination activities; processes and maintains records for all passenger requests for ADA right to accessible transit and ADA paratransit eligibility, ensuring compliance with Federal mandates and METRO guidelines.
- Produces periodic statistical summaries and analytical reports for METRO management, the Board of Directors and others as required; provides department management with complete passenger data for all eligible riders in a timely manner.
- Serves as the METRO liaison for matters relating to paratransit eligibility; develops and maintains effective and cooperative relationships within the community and with other transit agencies; assists in the organization and preparation for events; hosts and attends public meetings; produces correspondence with all stakeholders, including, but not limited to, eligible passengers, applicants, disability services agencies, Federal and local officials, professional associations and others as needed.
- Reviews and makes appropriate determinations on immediate needs certification and other special requests as needed.



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- Performs a variety of customer service duties; provides information to passengers both in-person and over the telephone; processes identification cards for ParaCruz passengers, including taking required photos; conducts mobility and travel training for fixed route passengers; responds to customer service issues in the paratransit program; receives complaints and feedback from customers by phone or in person; forwards completed documents to the appropriate person.
- Assists in the preparation of the program budget and monitors costs throughout the year; provides updates to management as needed.
- Conducts orientations and training for new employees and temporary staff; may provide training to current staff, as assigned.
- Makes mathematical and statistical calculations.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- 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, including processing appeals and hearings.
- Local and regional transportation services with an emphasis on paratransit services.
- Analytical methods of researching, gathering, organizing and reporting data, including basic statistical analysis.
- Modern office practices, procedures, and equipment, including specialized software applicable to transit services.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Public speaking techniques.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Principles and practices of effective training.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Communicate detailed information about local and regional transit systems, including routes and scheduling.
- Analyze, interpret, explain, and apply relevant laws, policies, regulations, and requirements related to paratransit and accessible transit services.
- Provide information to the public in a clear, accurate, and effective manner.



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- Work effectively with diverse individuals, including members of the disabled and older adult communities.
- Provide effective and responsive customer service, including in stressful situations.
- Address customer complaints in a sensitive and tactful manner.
- Negotiate solutions to difficult issues.
- Maintain a calm demeanor in stressful situations.
- Define complex problems and develop solutions using analytical techniques.
- Work independently using good judgment, tact, and discretion.
- Perform research and plan, organize and conduct analytical studies.
- Collect, analyze and interpret data, and prepare comprehensive reports of findings and recommendations.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in social science, human science, or a related field.

AND

Two (2) years of progressively responsible professional experience in program administration and monitoring.

Previous experience working in programs to serve the older adult and/or disabled communities is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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



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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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Transit Operations Professional



Attachment C

Class Code: Class Code
FLSA Status: Pending

Parts and Materials Supervisor **Bargaining Unit: PSA**

DEFINITION:

Under direction, a Parts and Materials Supervisor performs supervisory and skilled maintenance and administrative work related to requisitioning, receiving, inspecting, stocking and issuing of a variety of parts, equipment, tools, materials and supplies, including highly specialized items for facilities maintenance, custodial services, and vehicle maintenance activities; directs and ensures inventory control; prepares specifications for the ordering of requested items; assists management in overseeing the daily operating activities of assigned functions, including required record-keeping and other administrative support work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Parts and Materials Supervisor is the supervisory-level class in the series. An incumbent in this class is responsible for supervising subordinate staff that requisition, receive, inspect, stock and issue a variety of parts, equipment, tools, materials, and supplies for multiple METRO departments. Work requires advanced knowledge of storekeeping and purchasing methods as well as related departmental policies, practices, and procedures. This class is distinguished from the lower-level class of Senior Stock Clerk because an incumbent in the latter class serves as a lead worker over subordinate Stock Clerks.

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.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Reviews all invoices and shipping documents to ensure items received are correctly entered into inventory via computer and/or charged on a work order to the correct asset(s).
- Monitors the “out of service” list for buses that are out of service and waiting on parts; ensures that orders have been placed and timely delivery is made.
- Directs the weekly inventory of parts by groups (Perpetual Inventory); gathers data, prints out counting sheets, directs the inventory process, reconciles results of inventory physical count, and makes adjustments as required.
- Recommends the addition of new inventory items; adds new item numbers into the computerized inventory system; updates part numbers as required; prints item labels for shelving.
- Assists staff in identifying the more difficult items to be purchased; researches catalogs, parts manuals, the Internet, and other sources; orders parts with vendors online, over the phone, or by submitting purchase requisitions according to METRO policies.
- Researches, schedules, and assembles training materials and conducts weekly safety training for assigned staff.
- Gathers, tracks, tabulates and analyzes data pertaining to assigned functions; creates reports for management.



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- Monitors the accumulation of generated hazardous waste, such as used engine oil filters, waste oils, and coolant, used fluorescent lamp bulbs and waste absorbent products, etc., and arranges for pickup and disposal of items.
- Monitors the battery core program; arranges shipment back to vendors and follows up with vendors to get core credits.
- Administers and oversees METRO's MSDS program; ensures that all chemicals received and purchased are entered into the system.
- Participates in the daily work of requisitioning, receiving, inspecting, stocking and issuing materials and supplies and performing other Stock Clerk/Senior Stock Clerk duties.
- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents; answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Standard and specialized equipment, parts, tools and supplies required for maintaining light and heavy-duty vehicle systems, and their appropriate storage.
- Standard and specialized equipment, parts and supplies required to maintain a wide variety of non-vehicular equipment and facilities, and their appropriate storage.
- Standard and specialized equipment, parts and supplies required for custodial work as well other general operational needs of a transit agency, and their appropriate storage.
- Laws governing assigned functions and responsibilities.
- Advanced principles and methods of maintaining a standard inventory of high demand items.
- Advanced methods of determining the availability and best price for equipment, parts, tools, and supplies.
- Standard processes pertaining to purchasing and related data maintenance.
- Modern office practices, procedures, and equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:



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- Supervise and motivate subordinate staff effectively.
- Provide safety-related and other training to staff and ensure a safe work environment.
- Supervise and participate in the identification and procurement of a wide variety of tools, equipment, parts, supplies and other items requested by customers.
- Research the availability and price of requested items.
- Maintain and reconcile a large and complex inventory of items.
- Read and comprehend a variety of technical parts manuals, schematics, and safety-related documentation.
- Supervise the maintenance of an adequate inventory of high-demand items and ensure their appropriate storage.
- Ensure a safe and organized work area.
- Ensure the safe handling of items hazardous in nature.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a forklift after receiving appropriate training.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent quarter) units from an accredited college, including coursework in automotive or heavy equipment mechanics, business administration, or a related field.

AND

Four (4) years of progressively responsible experience receiving, stocking, issuing and maintaining inventory of automotive and heavy-duty transit parts and supplies. Experience must have also included at least two (2) years of inventory control responsibility AND one (1) year in a lead worker capacity.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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



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While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 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; solves problems; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop environment where the noise level may be loud and there is potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Payroll Technician **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Payroll Technician performs technical administrative work related to timekeeping and payroll functions for a single METRO bargaining unit or department; maintains payroll records and files; processes and audits electronic timekeeping records using an electronic timekeeping system; prepares and maintains payroll-related statistical records and reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Payroll Technician is the journey-level class in the series. An incumbent in this class performs technical duties related to the preparation, administration, and maintenance of payroll for a single department or bargaining unit, in accordance with Federal and State laws, rules, and regulations. This class is distinguished from the higher-level class of Senior Payroll Technician because an incumbent in the latter class has overall responsibility for organization-wide payroll processing and administers payroll activities impacting all METRO employees.

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.

- Administers payroll for a single METRO department or bargaining unit; audits timekeeping records for accuracy and makes correcting entries; inputs payroll information using an electronic timekeeping system; codes information for entry into computer records; applies labor contract provisions related to overtime rules and other special pay categories.
- Maintains, monitors and updates spreadsheets and other electronic tools for tracking and reporting absences, vacation use, over time, leave balances, and a variety of other payroll categories; compiles timekeeping and payroll data and develops, prepares, distributes, maintains, and files a variety of statistical and informational reports for management; verifies accuracy of payroll systems and reports and ensures that payroll activities comply with internal control procedures.
- Receives and reviews personnel actions; reviews pay or status changes such as appointments, changes in status, leaves and separations, and enters into payroll system.
- Identifies, develops, recommends and implements procedural and payroll system improvements.
- Prepares requested documents for internal, external and governmental auditors as required.
- Responds to questions and researches payroll related problems; provides information to management and departmental personnel regarding payroll and labor contract application.
- Assists with other technical administrative activities; may process workers' compensation forms; may track occupational illnesses and injuries; may assist with compiling data for budgetary purposes.
- Maintains confidential materials, records, files and other privileged information.
- Initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents.



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- Answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business and specialized METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of technical payroll administration.
- Principles, practices, and terminology of accounting and financial record-keeping procedures.
- Principles and practices of the Fair Labor Standards Act (FLSA) and other related payroll laws and regulations.
- State laws for record-keeping related to payroll processing.
- Taxable and non-taxable compensation principles.
- Methods of researching and resolving payroll issues.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Interpret, explain and apply payroll-related policies, procedures, and regulations.
- Interpret and apply labor contract provisions relating to payroll and benefits.
- Perform automated payroll data entry.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input timekeeping data into a payroll system.
- Design, prepare, and compile reports and information.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Perform mathematical calculations quickly and accurately.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 30 semester (or equivalent) units from an accredited college, including 12 units in accounting, business administration or a related field.

AND

Two (2) years of experience requiring technical bookkeeping, payroll accounting, financial clerical or related work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00



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*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Planning Data Analyst **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Planning Data Analyst performs professional analytical duties related to transportation planning functions and processes; collects, prepares and analyzes service data for the advancement of planning and scheduling projects, Federal and State reporting requirements, and grant applications; communicates and coordinates with the farebox provider to monitor software data collection methods and equipment, new fare media, and new fare tracking methods; tracks the department budget, processes invoices, and handles other administrative duties as needed; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Planning Data Analyst is a journey-level professional class. An incumbent in this class performs a wide range of tasks requiring knowledge, interpretation and application of specialized transportation planning administrative requirements, analysis and preparation of data and reports to meet various regulatory requirements, and other analytical duties to support departmental administrative functions.

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.

- Gathers ridership and other data relative to service performance using systems feedback data and field survey data collection; runs data queries of primary research from field surveys, GPS-based vehicle location systems, and fare media; monitors service statistic sources and data integrity.
- Analyzes, validates, evaluates and summarizes service data; forecasts potential federal funding sources.
- Utilizes service data to fulfill State, Federal and local reporting requirements; prepares narrative and statistical reports, maps, graphics and charts, including recommendations based on data analysis; coordinates the interdepartmental submission of the monthly and annual reporting to the National Transit Database.
- Validates and collects farebox and other system operational data to identify trends, deficiencies and forecasts, and to produce inputs for various documents such as short-range transportation plans.
- Coordinates and communicates with the farebox provider to maintain current service and/or modify service as needed.
- Administers departmental budgets; participates in and coordinates the annual budget development process; develops revenue and expenditure forecasts; processes invoices to track departmental spending against the established budget.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public; responds to comments, complaints and requests from METRO staff, Board members, the public, and other agencies.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.



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- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Budget methods for operating and short- and long-term transportation capital funding.
- Principles of transit operations and route development.
- The development of key performance indicators pertinent to transportation programs.
- Professional methods of researching, gathering, organizing and reporting data.
- Techniques for surveying and transmitting information.
- Financial and statistical analysis methods.
- Budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.
- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Project management methods and techniques.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios and percentages.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze transit data derived from computer models, cost/benefit analyses and public input.
- Read, analyze, understand and interpret complex planning-related reports and documents.
- Conduct cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the transit field.
- Write letters, memorandums, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.



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- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in public administration, business administration, transportation planning or a related field.

AND

Two (2) years of recent professional experience performing transportation planning or administrative analysis for a public transportation system.

Proficiency with Geographic Information Systems (GIS) and HASTUS software, as well as advanced proficiency with Microsoft Excel, are desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must participate in professional development activities.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Professional Administrative



Attachment C

*Class Code: Class Code
FLSA Status: Pending*

Planning Program Aide Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Planning Program Aide performs routine duties to assist with transit planning activities; collects a variety of transit data while on METRO buses, in the field and on the telephone; tabulates and summarizes data; prepares data for computer input; conducts other routine clerical duties; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Planning Program Aide is a journey-level planning support class. An incumbent in this class performs routine clerical and other support tasks that require basic knowledge and application of departmental policies, practices and procedures.

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.

- Counts passengers as they board and deboard buses; records schedule adherence to gather required service planning data; compiles data for various transit-related studies and surveys and assists in the compilation and summarization of service planning data.
- Surveys or interviews METRO passengers and the public on buses, in the field or on the telephone.
- Tabulates passenger counts; compiles totals, computes percentages and summarizes survey results.
- Calculates route distances and travel times for METRO routes.
- Prepares field sheets, line summaries and related forms using computer hardware and software.
- May assist with special projects and presentations to the public to support METRO public information and marketing.
- Performs routine general clerical work as assigned; may prepare documents, answer telephones, maintain files and provide information to the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures and equipment.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of maintaining information in computerized or hard copy files.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.



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- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Maintain basic records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

One (1) year of clerical experience requiring numerical recordkeeping, routine numerical research or statistical reporting using personal computers.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate. May occasional do field work.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Clerical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Purchasing Agent **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Purchasing Agent performs journey-level professional duties related to the acquisition, approval, receipt, and record-keeping for purchased equipment, materials, services and supplies; receives and processes purchase requisitions and purchase orders; sources vendors; negotiates pricing as well as other terms and conditions; generates purchase orders, service agreements and contracts; prepares and issues requests for proposals and invitations for bids and coordinates vendor selection processes; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Purchasing Agent is a journey-level professional administrative class. An incumbent in this class performs tasks requiring advanced knowledge, interpretation, and application of specialized purchasing policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements.

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.

- Reviews purchase requisitions for completeness and conformance with METRO policies as well as State and/or Federal laws; issues purchase orders for services, materials, supplies, and equipment; negotiates term with vendors and performs vendor reviews to ensure receipt of proper quality and quantity of materials.
- Prepares contracts and other documents for the purchase of supplies, services, and equipment; submits documents for review by METRO counsel and execution by the General Manager; prepares notifications of awards and distributes contracts.
- Consults with departments regarding bid and proposal specifications; prepares and issues requests for proposals and invitations for bids for procurements of equipment, service, and construction projects; writes advertisements to invite bids and proposals; prepares vendor lists and distributes bid/proposal packages; coordinates and schedules pre-bid and pre-proposal packages and conferences; conducts bid openings; participates in bid evaluation; writes recommendations to the Board for vendor selection.
- Ensures purchasing activities conform to applicable laws, regulations (including U.S. Department of Transportation regulations), and METRO policies; assists in the development of METRO policies and procedures for requisitioning, bidding, warehousing and distributing supplies, materials, and equipment.
- Meets and corresponds with prospective vendors, manufacturers, service suppliers, and sales representatives for product information; may investigate and resolve problems involving damaged goods, incorrect merchandise or invoicing errors, and unsatisfactory service performance.
- Meets and corresponds with other transit agency procurement officers to develop cooperative procurement contracts for equipment, materials, and supplies used by transit agencies.



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- Evaluates vendor performance and maintains vendor history records; conducts price and cost analysis, prepares, processes and maintains records correspondence, documents, and reports related to the purchasing function; assists in the development and maintenance of a computerized purchasing system.
- Drafts reports for the Board of Directors relating to the procurement of professional services, construction, vehicles and equipment as required by the District.
- Coordinates the notice, sale, and disposal of surplus vehicles and equipment.
- Maintains record-keeping for purchasing statistics related to DBE vendors and contractors; gathers data; assists in the preparation of DBE periodic reports.
- May supervise or lead the work of subordinate technical or clerical staff as an ancillary duty.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of public agency purchasing.
- State and Federal laws and regulations applicable to public sector purchasing, including third party contracting.
- Contract development, negotiations, and competitive bidding processes.
- Pricing, products, and services related to the transportation industry and sources of supply.
- Methods of conducting product and vendor research.
- The creation and use of spreadsheets, databases, and software to track information and automate calculations.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Principles and practices of supervision and leadership.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Evaluate, interpret and apply policies, procedures, and requirements as they apply to professional purchasing activities.
- Perform professional purchasing activities in a manner that complies with applicable laws, regulations, and policies.



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- Review requisitions and prepare product specifications, bids, and agreements.
- Evaluate quotations and bids and make awards consistent with METRO purchasing policies and requirements.
- Research and identify the price and availability of items to be purchased.
- Maintain complex and detailed records and control systems with accuracy and attention to detail.
- Create and use spreadsheets, databases, and software to track information.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Lead or supervise the work of subordinate technical or clerical staff.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in public administration, business administration, accounting or a related field.

AND

Two (2) years of experience performing professional purchasing work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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



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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 typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must participate in professional development activities.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Professional



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Class Code: Class Code
FLSA Status: Pending

Purchasing Technician **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Purchasing Technician performs technical duties to support the acquisition, approval, receipt, and record-keeping for purchased equipment, materials, services and supplies; receives and processes purchase requisitions and purchase orders; communicates with vendors to research, resolve and maintain product, price and delivery discrepancies; maintains purchasing records and files; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Purchasing Technician is a journey-level technical administrative class. An incumbent in this class performs tasks requiring interpretation and application of specialized purchasing policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the higher-level class of Purchasing Agent because an incumbent in the latter class performs professional purchasing work.

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.

- Receives and processes routine purchasing requisitions; analyzes requisitions for compliance with METRO standards and ensures information is complete and accurate; identifies possible suppliers; assists customers with determining specification requirements on requested items.
- Performs routine purchasing assignments; obtains price quotes and places orders.
- Investigates, assesses, and resolves straightforward products such as damaged goods and incorrect merchandise, failure to deliver on time, vendor billing problems, or other problems, complaints or discrepancies; contacts vendors and suppliers and appropriate internal departments to resolve issues.
- Files and maintains purchase orders and purchasing-related documentation.
- Uses a company credit card (Cal-Card) on selected small purchases within established authorization limits; maintains related records; reconciles Cal-Card statements and follows up with departments regarding discrepancies.
- Communicates with departments regularly regarding placed orders and answers questions on the status of orders; assists with the coordination of deliveries, services, and related matters.
- Serves as a liaison with vendors and suppliers; explains METRO purchasing policies and procedures.
- Reads the terms and conditions applicable to new vendors and flags discrepancies with METRO purchasing policies.
- Provides training and re-training to various METRO staff regarding purchasing procedures and the use of automated purchasing software.
- Responds to Public Records Requests as assigned.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.

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- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic principles and practices of public agency purchasing.
- Basic State and Federal laws and regulations applicable to public sector purchasing.
- Basic purchasing terminology and methods.
- General types and sources of equipment, materials, and supplies used by a transportation authority.
- The creation and use of computerized spreadsheets, databases, and software to track information and automate calculations.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Evaluate, interpret and apply policies, procedures, and requirements as they apply to technical purchasing activities.
- Perform technical purchasing activities in a manner that complies with applicable laws, regulations, and policies.
- Research and identify the price and availability of items to be purchased.
- Maintain complex and detailed records and control systems with accuracy and attention to detail.
- Create and use spreadsheets, databases, and software to track information.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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:

Completion of 30 semester (or equivalent) units from an accredited college, including coursework in public administration, business administration or a comparable field of coursework.

AND

Two (2) years of experience performing technical purchasing work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 20 pounds unaided may be required. 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; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Technical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Revenue Collection Clerk **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Revenue Collection Clerk performs clerical duties related to the collection and processing of transit vehicle revenues; collects fares from revenue vehicles; processes and prepares revenue for transfer and deposit; collects passenger counts and prepares ridership reports; may perform general office or support work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Revenue Collection Clerk is a journey-level clerical class. An incumbent in this class performs routine clerical and field tasks that require a basic knowledge and application of departmental policies, practices and procedures. This class is distinguished from the higher-level class of Revenue Collection Supervisor because an incumbent in the latter class performs supervisory and advanced revenue collection work.

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.

- Pulls and replaces farebox vaults from revenue vehicles; opens farebox vaults under a secure and prescribed procedure; coordinates with supervisors to determine which fare boxes need to be pulled.
- Collects and counts money using currency and other counting equipment; totals and records cash revenue; prepares transfer and bank deposit documents.
- Collects, counts and totals fares received in the form of tokens, passes and other receipts; separates, sorts and records passes, count cards and other passenger recordings.
- Supplies and maintains currency machines at transit centers; delivers equipment and supplies to METRO facilities as assigned.
- Prepares periodic reports including ridership counts, equipment use and maintenance records.
- May train others in revenue collection procedures; may review work for errors.
- May perform other routine clerical duties as needed such as preparing timekeeping and attendance records, typing documents, completing forms, entering data into computerized systems, maintaining files and records, answering phones, ordering supplies, and compiling data for reports.
- May assist in monitoring security contractors.
- May perform basic housekeeping duties in the counting room such as sweeping and dusting; may perform minor servicing and orderly arranging of equipment.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; operates specialized revenue and fare counting equipment.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures and equipment.



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- Principles and methods of currency counting and cash recordkeeping.
- Security measures to safeguard large sums of cash.
- Basic clerical processes pertaining to data entry and recordkeeping.
- Basic methods of maintaining information in computerized or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Basic money handling procedures including counting large sums of money.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Count and record currency and passenger fare receipts accurately and safely, in accordance with established procedures.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Input data into a computerized database.
- Maintain a calm demeanor in stressful situations.
- Perform work using good judgment and discretion.
- Type routine documents and forms.
- Balance multiple assignments simultaneously and effectively.
- Maintain confidentiality of materials, records, files and other privileged information.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to various work locations as required.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

One (1) year of clerical experience requiring revenue collection, cashiering and/or handling and counting large sums of money.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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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 often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 20 pounds unaided may be required. 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; uses basic math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee primarily works in a standard office environment where the noise level is moderate. May perform field work as needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Clerical



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Class Code: Class Code
FLSA Status: Pending

Revenue Collection Supervisor **Bargaining Unit: PSA**

DEFINITION:

Under direction, a Revenue Collection Supervisor performs supervisory and clerical work related to the collection of fares from revenue vehicles; processes and prepares revenue transfers and deposits; collects passenger counts and prepares ridership reports; performs various administrative support duties associated with departmental activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Revenue Collection Supervisor is the supervisory-level class in the series. An incumbent in this class performs work that requires a basic knowledge and application of supervisory principles, clerical procedures and departmental policies. This class is distinguished from the lower-level class of Revenue Collection Clerk because an incumbent in the latter class performs journey-level clerical duties primarily emphasizing the collection and recording of farebox revenues.

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.

- Supervises subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Develops and implements revenue collection procedures and ridership surveys and counts.
- Oversees and coordinates with contractors that participate in revenue collection activities, including the secure transportation of revenues.
- Communicates and coordinates with other METRO staff, outside agencies and the public as needed to implement assigned responsibilities.
- Works with outside auditors to verify cash balances and departmental financial records.
- Participates in revenue collections work by retrieving revenues from vehicles, collecting and counting currency and other fare revenues, preparing records of revenues received, and preparing deposits.
- Researches and gathers information to prepare periodic reports including ridership counts, equipment use and maintenance records; identifies data trends and prepares summaries for management.
- Performs other clerical duties as required.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; operates specialized revenue and fare counting equipment.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.

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- Principles and practices of transit revenue collection operations, currency counting and cash record-keeping.
- Security measures to safeguard large sums of money.
- Modern office practices, procedures and equipment.
- Clerical processes pertaining to data entry, purchasing, and recordkeeping.
- Methods of maintaining information in computerized or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Supervise and motivate subordinate staff effectively.
- Count and record currency and passenger fare receipts in accordance with established procedures.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Perform mathematical computations accurately.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Input data into a computerized database.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Completion of 60 semester (or equivalent quarter) units from an accredited college, including coursework in business administration, accounting, or a related field.

AND

Two (2) years of clerical experience requiring revenue collection, cashiering and/or handling and counting large sums of money.

Previous supervisory experience is desirable.



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LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 20 pounds unaided may be required. 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; uses basic math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee primarily works in a standard office environment where the noise level is usually moderate. May work out in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical



Attachment C

Class Code: Class Code
FLSA Status: Pending

Safety and Training Coordinator **Bargaining Unit: PSA**

DEFINITION:

Under direction, a Safety and Training Coordinator performs specialized professional administrative work related to planning, developing, updating, coordinating and conducting bus operator training and retraining programs and ensuring compliance with State and federally-mandated bus operator programs as well as METRO policies and procedures; develops and updates curriculum, lesson plans, and training/reference materials; participates in the development and updating of accident investigation procedures and processes as well as departmental safety procedures; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Safety and Training Coordinator is a professional program coordinator class. An incumbent in this class is responsible for planning, developing and coordinating the delivery of required training programs for bus operators.

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.

- Plans, develops, updates, coordinates and conducts bus operator training and retraining programs, ensuring compliance with State and federally-mandated bus operator programs as well as METRO policies, procedures and labor agreements.
- Develops and updates curriculum, lesson plans, training and reference materials for Bus Operators, Transit Supervisors and other METRO employees; develops a training procedures manual as well as other documentation, materials, and processes; revises and updates documentation as needed.
- Plans and develops training schedules; coordinates schedules with Transit Supervisors that assist with training and retraining of Bus Operators and other METRO employees.
- Assists the Base Superintendent with administering the DMV Employer Testing Program, including maintenance of examiner credentials; coordinates the DMV “pull program” and ensures that all employees meet licensing requirements; participates in CHP/DMV and other audits.
- Develops and coordinates ongoing line instruction programs, including the training of line instructors on monitoring, grading, reporting and program compliance criteria.
- Coordinates the accident review process; reviews completed accident reports and identifies patterns; documents and reports on recommendations for improvements; maintains records of accidents; prepares summary reports.
- Coordinates and oversees the maintenance of accurate training records and documentation, including records of driver training hours, VTT certification, and bus operator training certification.
- Oversees and participates in the evaluation of new Operators during training; provides recommendations regarding Operator retention based on training information; may participate in direct observations of Operator skills as required; recommends corrective action or re-training as appropriate; provides input on the selection of new Bus Operators as requested.
- Participates in the delivery of training instruction as required, including basic VTT classes; develops and may provide customized or specialized trainings as requested.



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- May represent METRO at disciplinary hearings, legal proceedings and other meetings.
- Supervises subordinate Safety and Training Instructors and may supervise technical, clerical or support staff; assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Federal, State, and local laws and regulations regarding transit buses, Department of Motor Vehicle and Federal Highway Administration laws, and bus operator training and retraining.
- Current teaching theory, methods, and practices, as well as effective curriculum development.
- Principles of program organization, administration and coordination.
- Common transit agency policies, procedures and bus operator labor contract parameters language associated with bus operations.
- Defensive driving techniques.
- Safety and health-related regulations applicable to transit operations.
- Principles and practices of employee supervision, including employee development, performance evaluation and progressive discipline.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including audio/visual equipment.

Ability to:

- Develop, organize, and coordinate an effective bus operator training program.
- Formulate specific objectives to compare and evaluate training results.
- Research, analyze and evaluate new training methods and techniques.
- Read, review and apply laws, regulations and labor contract provisions.
- Define problem areas and evaluate, recommend and implement alternative solutions to complex issues and problems.



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- Instruct others in the safe operation of METRO vehicles and adapt training procedures to the needs of the individual.
- Act as liaison with community groups, transit districts and regulatory agencies.
- Develop and write plans, procedures, reports, forms and tests.
- Conduct field investigations to identify patterns and problem areas and make recommendations.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university; and two (2) years of experience developing and presenting driver safety and training programs, preferably for a public bus transportation system.

OR

Five (5) years of experience as a transit supervisor for a medium to large agency providing bus transportation, including responsibility for driver training and VTT training.

LICENSES AND CERTIFICATES:

Possession of a valid Class B commercial driver license with passenger endorsement, verification of transit training (VTT), and an acceptable safe driving record/history is required at the time of appointment.

AND

Possession of a California State Bus Driver Training Instructor Certificate from the Department of Education at time of appointment.

OR

Possession of a Department of Transportation Instructor Credential to teach VTT classes at time of appointment.

SPECIAL REQUIREMENTS:

- Driving record will be reviewed as part of the application process.
- May occasionally require working extended hours or hours outside of regular schedule.



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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 regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 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 typically works in an office environment where the noise level is quiet. The employee occasionally works in a field environment with potential exposure to varied weather conditions, dust, fumes, and hazardous materials and where the noise level is loud.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Professional



Attachment C

Class Code: Class Code
FLSA Status: Pending

Safety and Training Instructor **Bargaining Unit: PSA**

DEFINITION:

Under general supervision, a Safety and Training Instructor performs technical and instructional duties related to training and re-training Bus Operators and other METRO staff in the proper and safe operation of transit buses and other METRO vehicles in accordance with Federal, State and local laws as well METRO policies, procedures and labor agreements; assists in the development of curriculum, lesson plans, and training/reference materials; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Safety and Training Instructor is a journey-level technical class. An incumbent in this class is primarily responsible for delivering required training programs for bus operators and other METRO staff while also performing other technical administrative duties.

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.

- Conducts training and re-training for Bus Operators and other METRO staff in the proper and safe operation of transit buses and other METRO vehicles in accordance with Federal, State, and local law as well METRO policies, procedures, and labor agreements.
- Assists with developing and updating curriculum, lesson plans, training schedules and reference materials for Bus Operators, Transit Supervisors, and other METRO employees; provides support to Transit Supervisors who assist with training and retraining of Bus Operators and other METRO employees.
- Performs ride checks during new Operator probation periods and in-service checks for veteran Operators; provides retraining of qualified line instructors as needed; acts as the designated examiner in the testing and certification of Operators.
- Assists the Base Superintendent with implementing the Department of Motor Vehicles (DMV) Employer Testing Program, including maintenance of examiner credentials; assists with administering the DMV “pull program” by ensuring that all employees meet licensing requirements.
- Maintains accurate training records and documentation, including records of driver training hours, Verification of Transit Training (VTT) certification, and bus operator training certification.
- Provides input to the evaluation of new Operators during training; provides recommendations regarding Operator retention based on training information; may participate in direct observations of Operator skills as required; recommends corrective action or re-training as appropriate; provides input on the selection of new Bus Operators as requested.
- Participates in special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopier machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.



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EMPLOYMENT STANDARDS:

Knowledge of:

- Federal, State, and local laws and regulations regarding transit buses, including DMV and Federal Highway Administration laws pertaining to bus operator training and retraining.
- Current teaching theory, methods, and practices, as well as effective curriculum development.
- Defensive driving techniques.
- Safety and health-related regulations applicable to transit operations.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software, including audio/visual equipment.

Ability to:

- Provide transit bus operator training in accordance with Federal, State, and local laws as well as METRO policies, procedures, and labor agreements.
- Read, review and apply laws, regulations and labor contract provisions.
- Instruct others in the safe operation of METRO vehicles and adapt training procedures to the needs of the individual.
- Develop and write plans, procedures, reports, forms, and tests.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 60 semester (or equivalent) units from an accredited college

AND



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One (1) year of experience developing and presenting driver safety and training programs, preferably with a public bus transportation system.

OR

Three (3) years of experience as a transit supervisor for a medium to a large agency providing bus transportation, including responsibility for driver training and VTT training.

LICENSES AND CERTIFICATES:

Possession of a valid Class B commercial driver license with passenger endorsement, Verification of Transit Training (VTT), and an acceptable safe driving record/history is required at the time of appointment.

AND

Possession of a California State Bus Driver Training Instructor Certificate from the Department of Education at time of appointment.

OR

Possession of a Department of Transportation Instructor Credential to teach VTT classes at the time of appointment.

SPECIAL REQUIREMENTS:

- Driving record will be reviewed as part of the application process.

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 regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in an office environment where the noise level is quiet. The employee frequently works in a field environment with potential exposure to varied weather conditions, dust, fumes, and hazardous materials and where the noise level is loud.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.



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- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Technical



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Class Code: Class Code
FLSA Status: Pending

Safety Program Specialist I **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Safety Program Specialist I performs a limited range of professional administrative duties related to implementing and maintaining workplace safety programs in compliance with Cal-OSHA requirements as well as METRO policies and procedures; collects and analyzes data and produces reports; investigates workplace accidents/incidents and claims filed against METRO; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Safety Program Specialist I is the first working-level class in the series. An incumbent in this class performs a limited range of professional program administrative duties while learning to perform the full scope of journey level work. This class may be distinguished from the higher-level class of Safety Program Specialist II because an incumbent in the latter class performs the full scope of journey-level professional administrative work.

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.

- Implements workplace safety programs in compliance with Cal-OSHA requirements as well as METRO policies and procedures.
- Implements the System Safety Program Plan and other METRO safety programs; reviews and conducts inspections of facilities and hazardous materials; evaluates workplace chemical usage; maintains compliance data; conducts hazard assessments and compliance audits; discusses procedural changes and requirements with departments; and addresses recurring issues.
- Provides information to the Safety, Security and Risk Manager regarding injury and property damage claims to assist in the determination of METRO liability; collects accident/incident information; verifies medical treatment expenses and lost wages; compiles value of property damage.
- Investigates accidents/incidents for both internal METRO incidents and external incidents; interviews and takes statements of claimants, employees, and witnesses; visits accident/incident scenes and takes pictures and measurements; analyzes events; examines property damage; obtains injury information; interprets management practices; assesses findings in order to make recommendations regarding cause, severity and action; and generates a final written report.
- Maintains and tracks records; prepares reports on status of claims; organizes materials and documents claim files; maintains accurate records and files.
- Researches changes in Federal and State health and safety laws and codes, including occupational safety and health regulations at both the State and Federal levels.
- Makes recommendations to the Safety, Security and Risk Manager of policy changes needed to maintain compliance.
- Assists METRO departments with the implementation of emergency response planning; coordinates drills implementing emergency plans; makes recommendations on areas of improvement and efficiency; responds to various emergencies.



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- Identifies and processes recovery actions for damages METRO sustained from vehicle accidents, tenant lease agreements, and other related expenses.
- Implements and facilitates workplace safety and environmental training programs; produces and schedules monthly safety awareness topics; assists team members in other safety areas; maintains training records.
- Determines workplace safety training needs; recommends, develops and conducts training of employees regarding safety related issues such as safety awareness, ergonomics, Cal-OSHA requirements, and proper use of safety equipment.
- Assists with workplace safety regulatory compliance; submits compliance related reports, inspection forms, and other records; evaluates corrective action issues and regulatory changes/interpretations; obtains samples for analytical analysis.
- Develops various workplace safety analysis tools such as key performance indicators, dashboards and scorecards to track and analyze trends and monthly outcomes; reviews all workplace injuries and performs focused training to help other employees avoid such injuries; performs field safety observations to assess safety on buses and at METRO facilities.
- Prepares and provides appropriate information and required documentation as needed for small claims court hearings.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; operates photography equipment; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Cal-OSHA regulations.
- Applicable Federal, State and local safety regulations, laws and standards.
- Proper presentation of safety regulatory compliance regulations such as legal placement of warning signs.
- Industry workplace safety standards and best management practices.
- Effective presentation methods.
- Hazard analysis and implications throughout the system life cycle.
- Tools and techniques of data collection, on scene evidence collection and interviewing witnesses.
- Applied preventative/predictive failure analysis, risk assessment and deductive reasoning.
- Accident investigation and hazard analysis.
- Claims investigation methods, techniques and settlement negotiations.
- Methods of legal and factual research.
- Basic discovery requirements.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.



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- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including audio/visual equipment.

Ability to:

- Interpret safety laws and regulations and resolve conflicting regulations.
- Ensure compliance from employees and supervisors regarding issues with METRO's safety programs.
- Procure required documentation from vendors to ensure compliance.
- Perform timely notification of incidents in accordance with safety and risk management program requirements.
- Use tools and equipment for incident/accident investigations and hazard assessments.
- Understand and apply laws and administrative policies and procedures in the evaluation of routine property and liability insurance claims.
- Investigate accident scenes, analyze events, and draw sound conclusions.
- Develop and write correspondence, plans, procedures, reports, and forms.
- Conduct field investigations to identify patterns and problem areas and make recommendations.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in environmental health/safety, occupational health/safety or a related field.

AND

One (1) year of professional experience in system safety program planning, industrial hygiene, environmental health/safety or occupational health/safety.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

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Possession of a Cal-OSHA Safety and Health certificate is required at the time of appointment.

Possession of a Cal-OSHA Advanced Safety and Health certificate is desirable.

Additional OSHA coursework related to risk management and claims resolution is desirable.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.
- Fluency in both English and Spanish is required.
- May occasionally require working extended hours or hours outside of regular schedule.

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 typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Professional



Attachment C

Class Code: Class Code
FLSA Status: Pending

Safety Program Specialist II **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Safety Program Specialist II performs professional administrative duties related to designing, developing, implementing and maintaining workplace safety programs in compliance with Cal-OSHA requirements as well as METRO policies and procedures; collects and analyzes data and produces reports; investigates workplace accidents/incidents and claims filed against METRO; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Safety Program Specialist II is the journey-level class in the series. An incumbent in this class performs the full-scope of journey-level professional administrative work related to implementing mandatory workplace safety programs and training. This class may be distinguished from the lower-level class of Safety Program Specialist I because an incumbent in the latter class performs a limited range of duties while learning to perform the full scope of journey-level work.

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.

- Designs, develops and maintains workplace safety programs in compliance with Cal-OSHA requirements as well as METRO policies and procedures.
- Implements the System Safety Program Plan and other METRO safety programs; reviews and conducts inspections of facilities and hazardous materials; evaluates workplace chemical usage; maintains compliance data; conducts hazard assessments and compliance audits; discusses procedural changes and requirements with departments; and addresses recurring issues.
- Provides information to the Safety, Security and Risk Manager regarding injury and property damage claims to assist in the determination of METRO liability; collects accident/incident information; verifies medical treatment expenses and lost wages; compiles value of property damage.
- Investigates accidents/incidents for both internal METRO incidents and external incidents; interviews and takes statements of claimants, employees, and witnesses; visits accident/incident scenes and takes pictures and measurements; analyzes events; examines property damage; obtains injury information; interprets management practices; assesses findings in order to make recommendations regarding cause, severity and action; and generates a final written report.
- Maintains and tracks records; prepares reports on status of claims; organizes materials and documents claim files; maintains accurate records and files.
- Researches changes in Federal and State health and safety laws and codes, including occupational safety and health regulations at both the Federal and State levels.
- Makes recommendations to management regarding policy changes needed to maintain compliance.
- Assists METRO departments with the implementation of emergency response planning; coordinates drills implementing emergency plans; makes recommendations on areas of improvement and efficiency; responds to various emergencies.



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- Identifies and processes recovery actions for damages METRO sustained from vehicle accidents, tenant lease agreements, and other related expenses.
- Implements, assists and facilitates workplace safety and environmental training programs; produces and schedules monthly safety awareness topics; assists team members in other safety areas; maintains training records.
- Determines workplace safety training needs; recommends, develops and conducts training of employees regarding safety related issues such as safety awareness, ergonomics, Cal-OSHA requirements, and proper use of safety equipment.
- Assists with workplace safety regulatory compliance; submits compliance related reports, inspection forms, and other records; evaluates corrective action issues and regulatory changes/interpretations; obtains samples for analytical analysis.
- Develops various workplace safety analysis tools such as key performance indicators, dashboards and scorecards to track and analyze trends and monthly outcomes; reviews all workplace injuries thoroughly and performs focused training to help other employees avoid such injuries; performs field safety observations to assess safety on buses and at METRO facilities.
- Prepares and provides appropriate information and required documentation as needed for small claims court hearings.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; operates photography equipment; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Cal-OSHA regulations.
- Applicable Federal, State and local safety regulations, laws and standards.
- Proper presentation of safety regulatory compliance regulations such as legal placement of warning signs.
- Industry workplace safety standards and best management practices.
- Effective presentation methods.
- Hazard analysis and implications throughout the system life cycle.
- Tools and techniques of data collection, on scene evidence collection and interviewing witnesses.
- Applied preventative/predictive failure analysis, risk assessment and deductive reasoning.
- Accident investigation and hazard analysis.
- Claims investigation methods, techniques and settlement negotiations.
- Methods of legal and factual research.
- Basic discovery requirements.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Analytical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Advanced time management techniques.



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- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including audio/visual equipment.

Ability to:

- Interpret safety laws and regulations and resolve conflicting regulations.
- Ensure compliance from employees and supervisors regarding issues with METRO's safety programs.
- Procure required documentation from vendors to ensure safety compliance.
- Perform timely notification of incidents in accordance with safety and risk management program requirements.
- Use tools and equipment for incident/accident investigations and hazard assessments.
- Understand and apply laws and administrative policies and procedures in the evaluation of routine property and liability insurance claims.
- Investigate accident scenes, analyze events, and draw sound conclusions.
- Develop and write correspondence, plans, procedures, reports, and forms.
- Conduct field investigations to identify patterns and problem areas and make recommendations.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in environmental health/safety, occupational health/safety or a related field.

AND

Three (3) years of professional experience in system safety program planning, industrial hygiene, environmental health/safety or occupational health/safety.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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AND

Possession of a Cal-OSHA Advanced Safety and Health certificate is required at time of appointment.

Additional Cal-OSHA coursework related to risk management and claims resolution is desirable.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.
- Fluency in both English and Spanish is required.
- May occasionally require working extended hours or hours outside of regular schedule.

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 typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Professional



Attachment C

Class Code: Class Code
FLSA Status: Pending

Scheduling Specialist **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Scheduling Specialist performs technical duties to support METRO planning activities by utilizing computerized scheduling software to develop transit routes, operating schedules, and related documents according to Planning Department guidelines; develops block sheets, Operator paddles, extra board lists and other bid materials; responds to feedback from various sources by proposing, testing and establishing approved route changes; reviews and analyzes transit operations data to produce reports used in evaluating and improving transit service; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Scheduling Specialist is a journey-level, specialized technical class. An incumbent in this class performs a wide range of tasks requiring technical knowledge of bus operations as well as basic knowledge of transportation planning policies, procedures and requirements.

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.

- Utilizes computerized scheduling software to develop transit routes, operating schedules, and related documents according to Planning Department guidelines; revises existing routes and schedules based on feedback from a variety of sources including customer requests, patronage data, vehicle running times, traffic patterns, street closures, and other information.
- Monitors current service levels for potential route/schedule changes to improve efficiency, productivity and effectiveness and considering numbers of stops, length of routes and runs per shift; tests proposed route and schedule changes using computerized models; balances and verifies schedules, work runs and personnel requirements for accuracy and compliance with applicable provisions and guidelines; participates in test trips of new or revised transit routes; may develop routes as part of restructuring or research projects.
- Prepares Operator bids and special bids as required by the collective bargaining agreements; develops block sheets, Operator paddles, extra board lists and other related materials for Operator bids.
- Develops and maintains statistical data related to schedules, work runs, personnel requirements and service costs; assists in projecting the cost of route and schedule changes based on Operator pay categories.
- Prepares a variety of correspondence as well as periodic and ad hoc reports as required; prepares Operator bid and schedule information for payroll purposes.
- Performs research and survey activities for various service planning projects.
- Assists Information Technology with the development, enhancement, testing, maintenance and support of computer applications used for schedule planning, schedule building, run cutting and data collection; provides subject matter expertise on operational and business requirements; tests new techniques and aids to scheduling as they become available.



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- Explains pending route and service changes to members of the public and representatives of community organizations as part of an outreach team; reviews customer complaint letters; assists in preparing responses and recommends changes as appropriate.
- Proofreads schedule materials or electronic schedule information prior to publication.
- Attends meetings as directed; communicates and meets with union representatives during development of the Operator bid as directed.
- Makes mathematical and statistical calculations.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Federal, State and local laws governing transit operations.
- Principles of transit operations and route development and the development of key performance indicators.
- Technical methods of researching, gathering, organizing and reporting data.
- Techniques for surveying and transmitting information.
- Basic statistical analysis methods.
- Community interrelationships.
- Computer software common to the route and schedule planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios and percentages.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Use transit data derived from computer models, cost/benefit analyses and public input to propose and establish bus routes and Operator schedules.
- Utilize specialized computer programs and other tools to create bus routes and schedules.
- Read, analyze, understand and interpret planning-related reports and documents.
- Conduct technical data analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the transit field.



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- Write letters, memorandums and technical reports and fact sheets designed to be understood by all audiences, including the general public.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Completion of 60 semester (or equivalent quarter) units from an accredited college, including coursework in urban or transportation planning, public administration, business administration or a related field.

AND

Two (2) years of recent transit operations experience, including responsibility for scheduling, dispatching, bus operations or related duties.

Experience working with transit scheduling software is desirable.

Bachelor's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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



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

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Planning Technical



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Class Code: Class Code
FLSA Status: Pending

Senior Custodial Service Worker **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Senior Custodial Service Worker performs lead worker as well as janitorial and related tasks at METRO facilities; ensures that facility interiors and exteriors are clean and orderly; performs minor building maintenance duties; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Custodial Service Worker is the advanced-level class in the series. An incumbent in this class leads and performs janitorial and routine facility maintenance duties necessary to maintain clean, sanitary, and safe conditions in various METRO facilities. This class is distinguished from the lower-level class of Custodial Service Worker because an incumbent in the latter class performs journey-level custodial duties and does not have formal lead-worker responsibilities. This class is distinguished from the higher-level class of Custodial Supervisor because an incumbent in the latter class supervises the work of subordinate custodial staff and is also responsible for ensuring the availability of materials, supplies, and equipment.

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 Custodial Service Workers by prioritizing, assigning and monitoring work and providing training as needed; may provide input on performance evaluations.
- Inspects METRO facilities to ensure compliance with standards of cleanliness and maintenance and verify appropriate health and safety conditions; inspects equipment and tools to ensure proper maintenance and operating condition; documents inspection findings; advises staff of needed corrections.
- Performs routine inspections of heating and ventilating systems; conducts routine troubleshooting and/or repair of fans, motors, and other facility equipment; may perform routine repairs on janitorial equipment, tools, and machinery; may perform minor plumbing, painting, electrical, grounds or related facility maintenance repairs as needed.
- Identifies maintenance and repair work requiring the assistance of higher-level staff and reports the situation to the supervisor in a timely manner.
- Responds quickly to reports of safety, sanitary and fire hazards; ensures immediate hazards are addressed appropriately and that repairs/corrections are scheduled/completed.
- Respond to customer complaints if appropriate or refer to a supervisor.
- Places orders and maintains inventory of cleaning and maintenance supplies.
- Coordinates the preparation of facilities for meetings and events as assigned; leads and participates in special cleaning activities as well as setting up, moving and/or arranging furniture or equipment.
- Conducts safety checks by checking for locked doors, temperature readings for heating and air conditioning, and on/off switches for machines.



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- Ensures safe usage of chemical cleaning materials in compliance with METRO policies and procedures and in compliance with Cal-OSHA regulations.
- Performs the duties of a Custodial Service Worker as required.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Acceptable standards for the cleaning and routine maintenance of public facilities.
- Applicable laws, regulations, policies, procedures and general safety practices related to janitorial work.
- Standard and specialized equipment, parts, tools and supplies required for commercial janitorial work.
- Operation of janitorial equipment such as buffers, carpet cleaners, floor strippers, and other cleaning equipment.
- Commercial cleaning practices, supplies, and equipment.
- Proper use of various cleaning chemicals.
- Basic building and grounds maintenance techniques, including routine plumbing, painting, electrical and landscaping activities.
- Basic operation and maintenance of heating and ventilating equipment.
- Standard tools, terminology, and practices used in skilled maintenance trades.
- Time management techniques.
- Basic mathematical skills to create proper dilutions of cleaning products.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Understand and follow oral and written directions.
- Serve as a lead worker over subordinate staff.
- Lead and perform a wide variety of janitorial and routine facility maintenance duties in an effective and safe manner.
- Perform minor mechanical repairs.
- Oversee the safe operation of janitorial equipment.
- Oversee the safe use of chemical cleaning agents.
- Prepare operational reports.
- Work with moderate independence using good judgment, tact, and discretion.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Interact effectively and courteously with the public and address customer complaints in a sensitive and tactful manner.
- Use basic mathematical skills including addition, subtraction, multiplication, division, and fractions.



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- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 experience performing facility cleaning, maintenance, and minor repair activities, including some experience with basic carpentry, painting, electrical, plumbing, heating or ventilating repair work.

Previous lead worker experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects. The employee is regularly required to stoop at the waist, kneel, crouch, crawl and climb. Occasional lifting up to 25 pounds unaided may be required. 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; uses basic mathematical skills; solves routine problems; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in various facilities where there is frequent exposure to moving mechanical parts and is occasional exposure to hot, wet and/or humid conditions, fumes, toxic or caustic chemicals. The noise level is usually moderate. The employee is occasionally exposed to varied weather conditions.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Custodial



Attachment C

Class Code: Class Code
FLSA Status: Pending

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 other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Customer Service Representative is the advanced-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/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 call-backs; 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 METRO at special events; may assist with the design and preparation of brochures, informational flyers, written articles, and news releases.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; operates a cash register and photography equipment; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.



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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 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 addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- 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 scheduling.
- 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 METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Utilize specialized equipment such as ticketing machines, cash registers, and photo identification printers.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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:

Two (2) years of progressively responsible clerical customer service experience equivalent to a Customer Service Representative with Santa Cruz Metro.

Fluency in English and Spanish is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Customer Service



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Class Code: Class Code
FLSA Status: Pending

Senior Facilities Maintenance Worker **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Senior Facility Maintenance Worker performs lead worker as well as semi-skilled and skilled tasks related to the maintenance, repair, and construction of METRO facilities, properties, and related equipment; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Facilities Maintenance Worker is the advanced-level class in the series. An incumbent in this class leads and performs a wide variety of semi-skilled and skilled facility maintenance work that includes the maintenance and repair of tools and equipment. This class is distinguished from the lower-level class of Facilities Maintenance worker because an incumbent in the latter class performs the full-scope of journey level facilities maintenance duties. This class is also distinguished from the higher-level class Facilities Maintenance Supervisor because an incumbent in the latter class supervises the work of subordinate facilities maintenance 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; maintains employee attendance records.
- Receives and prioritizes work requests and distributes work to staff.
- Leads and performs semi-skilled and skilled work related to the maintenance, repair, construction and remodeling of METRO facilities, properties, and related equipment.
- Inspects facilities and related equipment for needed repairs including lighting, electrical, plumbing, roofing, HVAC and mechanical systems; inspects walls, windows, locks, and doors; tests and checks landscaping and irrigation systems.
- Determines materials and time needed to conduct needed maintenance or repairs; requisitions or otherwise requests needed materials and equipment to perform work; meets with vendors or contractors as necessary to review project activities.
- Performs maintenance, repair, construction or remodeling work utilizing carpentry, plumbing, electrical, painting, door/window, locksmith, alarm, roofing, and related trade skills.
- Maintains and repairs washers, lifts, cranes, water and air systems, pumping systems, dispensing systems and other.
- Monitors and maintains secondary storage systems including above-ground waste storage and hazardous materials storage; pumps out waste collection systems; collects stormwater runoff samples for hazardous testing.
- Offloads Compressed Natural Gas (CNG) and diesel fuel from trucks to METRO fueling facilities; monitors fuel station; implements emergency procedures for spill recovery as required.
- Performs landscaping and hardscaping repair and maintenance; installs concrete; paints buildings; repairs benches.

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- Operates a variety of manual and power tools and equipment including hand tools, bench and table tools, welding tools and landscaping tools; operates vehicles such as dump trucks, truck mounted cranes and forklifts.
- Prepares time and materials estimates for assigned projects.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of buildings and facilities, including carpentry, plumbing, painting, concreting, masonry, HVAC, welding, mechanical and electrical work.
- Uniform Building and Electrical codes.
- Operation and maintenance of internal combustion engines and hydraulic equipment.
- Occupational hazards of the maintenance trades and appropriate safety equipment and practices.
- Methods and equipment used in groundskeeping operations.
- Safe operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Serve as a lead worker over subordinate staff.
- Perform a wide variety of maintenance, repair, construction and remodeling to facilities, properties, buildings, and related equipment.
- Read and interpret building and mechanical codes, blueprints, plans, and technical manuals.
- Diagnose and troubleshoot equipment problems.
- Estimate costs and determine materials and equipment needed to make building and equipment repairs.
- Use manual and power tools and equipment safely.
- Make quick decisions in an emergency.
- Ensure the safe handling of hazardous items and materials.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.



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- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of experience equivalent to a Facilities Maintenance Worker with Santa Cruz METRO.

OR

One (2) years of journey-level experience in one of the following building trades: carpentry, electrical, plumbing, welding or painting. (Note: journey-level status typically requires four (4) years of formal training or apprenticeship).

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, crawl, kneel, crouch, and climb. Occasional lifting up to 50 pounds unaided may be required. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in a shop environment where the noise level is usually noisy. The employee may work outdoors in varied weather conditions with potential exposure to fumes, dust, grease, air



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contaminants, hazardous materials and chemicals. Work requires heavy physical labor and working in confined spaces.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Facilities



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Class Code: Class Code
FLSA Status: Pending

Senior Mechanic Bargaining Unit: VMU

DEFINITION:

Under general supervision, a Senior Mechanic performs lead worker and skilled maintenance work related to the repair, alteration, and service of METRO vehicles and related equipment; coordinates, assigns and oversees the day-to-day work performed by Mechanic staff; performs skilled and complex repair and maintenance of METRO buses, vehicles, and related fleet equipment; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Mechanic is the advanced and lead-level class in the series. An incumbent in this class performs highly-skilled and very difficult maintenance, diagnostic, troubleshooting, overhaul, and repair work on buses, automobiles, trucks and other equipment and also serves as a lead worker over subordinate Mechanics. This position may be distinguished from the lower-level class of Mechanic III because an incumbent in the latter performs advanced technical work but is not assigned the full scope of lead worker duties.

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; maintains employee attendance records.
- Receives and prioritizes work requests and distributes work to staff.
- Leads and performs a variety of skilled and semi-skilled tasks in the mechanical maintenance, repair and modification work on buses, automobiles, trucks and other METRO equipment, including the full scope of lower level Mechanic duties.
- Inspects the work of Mechanics and other fleet staff, providing technical assistance and training as needed.
- Performs a variety of highly-skilled and difficult tasks in the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other METRO vehicles and equipment.
- Inspects equipment for needed repairs; determines parts, materials and time needed to conduct needed maintenance or repairs; determines whether parts are in stock or must be ordered; requisitions or otherwise requests needed parts and materials to perform work.
- Performs major engine and vehicle system overhauls; repairs and adjusts compressed natural gas (CNG), diesel and gasoline engines, transmissions, and other vehicle systems and components; maintains, diagnoses, inspects, and repairs CNG and diesel supply tanks, fuel delivery systems and related components.
- Inspects, diagnoses and repairs vehicle electrical systems.
- Inspects, relines and adjusts brakes; removes and installs tires; performs wheel alignments; and performs other vehicle maintenance tasks.
- Performs safety and preventative maintenance inspections as required.

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- Responds to emergency repair road calls.
- Recognizes potential safety hazards and makes appropriate recommendations to higher-level staff.
- Fuels METRO equipment including gasoline, diesel and CNG vehicles.
- Maintains METRO property, tools, and equipment used in vehicle maintenance.
- Maintains clean a work area.
- Maintains accurate written and electronic records, logs and work orders.
- Provides technical direction and assistance to lower level staff.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Advanced vehicle and equipment overhaul and repair procedures.
- Advanced diesel, gasoline and CNG engine tune-up procedures.
- Advanced electrical and hydraulic system repairs.
- Advanced air brake system repairs.
- Safe mechanical work practices.
- Proper use of hand, electric, pneumatic, and hydraulic tools and diagnostic equipment.
- Welding and oxygen-acetylene equipment used in the repair, maintenance, and service of vehicles.
- Standard electronic diagnostic equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Serve as a lead worker over subordinate staff.
- Read and interpret complex technical manuals and schematics.
- Diagnose and troubleshoot complex equipment problems.
- Operate welding equipment, brake drum lathes, drill presses, diagnostic equipment and other tools and equipment used in the repair, maintenance, and service of vehicles.
- Use manual and power tools and equipment safely.
- Estimate costs and determines the materials and equipment needed to make vehicle and equipment repairs.



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- Ensure the safe handling of hazardous items and materials.
- Apply safe work practices and procedures around extremely high pressure and flammable CNG fuel.
- Make quick decisions in an emergency.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Provide technical direction and training to less skilled staff.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

One (1) year of responsible experience equivalent to a Mechanic III with Santa Cruz METRO.

OR

Three (3) years of progressively responsible experience equivalent to a Mechanic II with Santa Cruz METRO.

OR

Five (5) years of progressively responsible experience performing heavy-duty mechanic work. Experience must have also included rebuilding and repairing CNG, and/or diesel engines and related units and assemblies.

Previous lead worker experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

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- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Senior Paralegal **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Senior Paralegal performs advanced and specialized legal technical work for the Chief Executive Officer, General Counsel, and Human Resources Director by assisting with complex human resources functions while also providing advanced support for litigation and related legal matters; assists with administering workers' compensation, employee leave, and other Human Resources programs; assists Counsel in preparing for litigation by performing legal research, interviewing witnesses and preparing legal documents; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Paralegal is the journey-level class in the series. An incumbent in this class performs advanced and specialized technical legal activities requiring knowledge of complex human resources-related functions, policies and procedures as well as general paralegal processes. This class is distinguished from the lower-level class of Paralegal because an incumbent in the latter class performs journey-level paralegal work.

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.

- Reviews, tracks, and monitors employee leave documentation; drafts correspondence and prepares reports and documentation for employee leaves including, but not limited to, FMLA/CFRA/PDL, disability retirement, long term disability, and request for life insurance waivers; communicates and coordinates with department managers and employees on documentation regarding employee leaves, return to work plans, and workers' compensation status.
- Assists in monitoring workers' compensation cases from inception to final disposition; reviews and processes workers' compensation claim forms and related documents; audits, reviews, corrects and prepares statements from workers' compensation contractors and providers; provides information to supervisors and employees regarding employee status; monitors employee absences.
- Prepares and maintains workers' compensation logs, posters, reports, notices and related records and materials; assists management in maintaining regulatory compliance in the workers' compensation program; acts as liaison between other departments, the workers' compensation claims administrator, insurance carriers, contractors and others; monitors workers' compensation claim payments and other administrative expenses.
- Tracks and maintains union contracts and management compensation plan changes and agreements.
- Tracks the 60-day window for employee COBRA eligibility; processes COBRA enrollment for former employees, dependents and retirees electing to enroll in COBRA dental and vision benefits.
- Administers METRO's Lactation Accommodation Program; communicates with employees returning from maternity leave and schedules use of lactation accommodation rooms.
- Processes records requests according to the California Public Records Act and responds to Title II/Title VI/ADA/504 complaints pursuant to METRO's policies; communicates and coordinates



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with department managers and employees regarding legal inquiries and document subpoenas received from Superior Court; responds to employee and public inquiries, documents requests, and subpoenas.

- Drafts and files legal documents such as reports, contracts, indemnity agreements, ordinances, and other legal documents; confers with the CEO, General Counsel, investigators, employees, and other individuals regarding legal matters; researches, studies, and applies statutes, case law, legislation, and other legal authorities for use in litigation filings; drafts policies and regulations for review by General Counsel.
- Assists with legal matters related to CalTIP claims and the Disadvantaged Business Enterprise (DBE) Program.
- Assists with preparing and administering departmental budgets; assists in preparing purchasing documents; assists in maintaining information in the Human Resources Information System (HRIS); assists with tracking drug and alcohol testing.
- Prepares training materials and presentations to management; prepares staff reports for Council Board meetings and draft resolutions.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, methods, materials, and practices of legal research.
- Federal and State leave related regulations including FMLA/CFRA/PDL.
- General laws, regulations, procedures, and practices pertaining to workers' compensation claims processing as well as other specialized human resources activities.
- Clerical processes pertaining to accounting, purchasing, and data maintenance.
- Statutes and codes applicable to civil proceedings and claims.
- Legal document formats and filing procedures.
- Hearing procedures and rules of evidence.
- Preparation of routine procedural and substantive civil litigation.
- Applicable court rules, including drafting and responding to pleadings.
- Pleading formats, citation style, content requirements, and local filing requirements.
- Civil litigation calendar management.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting information.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.



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Ability to:

- Draft legal documents including complex briefs, memos, ordinances, and resolutions.
- Research, analyze, and apply complex legal principles, facts, evidence, and precedents to legal issues.
- Communicate and present statements of fact, law, and argument clearly, logically and effectively.
- Interview and interact with the public, outside attorneys and District employees regarding discovery, case investigation, and trial preparation.
- Interpret, explain and apply legal and human resources policies, procedures and regulations.
- Gather, analyze, and summarize complex information presented in a variety of formats.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Develop and maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Paralegal certificate from an accredited school.

AND

Three (3) years of legal experience as a paralegal, legal assistant, or legal secretary. Experience must have included at least one (1) year of technical human resources experience, preferably with responsibility in leave administration, workers' compensation, and employee drug testing.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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



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stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Legal Technical



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Class Code: Class Code
FLSA Status: Pending

Senior Payroll Technician **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Senior Payroll Technician performs advanced technical administrative work related to timekeeping and payroll matters impacting all METRO bargaining units and departments; coordinates and maintains centralized payroll records and files; prepares and maintains complex payroll-related statistical records and reports; coordinates and performs special payroll or accounting-related projects; processes and audits electronic timekeeping records using an electronic timekeeping system; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Payroll Technician is the advanced-level class in the series. An incumbent in this class performs advanced technical duties related to the organization-wide preparation, administration, and maintenance of payroll in accordance with Federal and State laws, rules, and regulations. This class is distinguished from the lower-level class of Payroll Technician because an incumbent in the latter class performs journey-level technical payroll processing and administration for a single METRO department or bargaining unit.

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.

- Administers centralized, organization-wide payroll activities impacting multiple departments and or bargaining units; audits timekeeping records for accuracy and makes correcting entries; inputs payroll information using an electronic timekeeping system; uses codes information for entry into computer records; applies labor contract provisions related to overtime rules and other special pay categories.
- Maintains, monitors and updates spreadsheets and other electronic tools for tracking and reporting absences, vacation use, over time, leave balances, and a variety of other payroll categories; compiles timekeeping and payroll data and develops, prepares, distributes, maintains, and files a variety of statistical and informational reports for management; verifies accuracy of payroll systems and reports and ensures that payroll activities comply with internal control procedures.
- Prepares and electronically submits all payroll documents to payroll contractor; corrects errors prior to export; communicates with contractors on payroll issues, questions, deadlines, and procedures; responds to questions from employees, supervisors, and managers regarding timekeeping, direct deposit, accruals, and other and payroll issues.
- Maintains payroll records, reviews absence tracking information and reports, and adjusts as required.
- Receives and reviews personnel actions submitted by multiple departments; reviews pay or status changes such as appointments, changes in status, leaves, and separations and enters into payroll system.
- Requests and collects payroll documents, trust warrants, and topics paychecks from payroll contractor; communicates with the payroll contractor and internal departments.

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- Identifies, develops, recommends and implements procedural and payroll system improvements; coordinates with other METRO departments regarding timekeeping rules and procedures; recommends solutions to problems and provides timekeeping system training; responds to questions and researches payroll related problems; provides information to management and departmental personnel regarding payroll and labor contract application.
- Prepares requested documents for internal, external and governmental auditors as required.
- Works with Information Technology staff to maintain system integrity, troubleshoot technical issues and test the payroll system after configuration changes or updates; utilizes and maintains procedures for electronic payroll timekeeping system; reviews payroll procedures and recommends changes.
- Assists with other technical administrative activities; may process workers' compensation forms; may track occupational illnesses and injuries; may assist with compiling data for budgetary purposes.
- Maintains confidential materials, records, files and other privileged information.
- Initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents.
- Answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business and specialized METRO computer software in performing job tasks.
- May provide functional direction to other staff performing payroll-related duties.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles and practices of technical payroll administration.
- Principles, practices, and terminology of accounting and financial record-keeping procedures.
- Principles and practices of the Fair Labor Standards Act (FLSA) and other related payroll laws and regulations.
- State laws for record-keeping related to payroll processing.
- Taxable and non-taxable compensation principles.
- Advanced methods of researching and resolving payroll issues.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:



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- Interpret, explain and apply complex payroll-related policies, procedures, and regulations.
- Interpret and apply labor contract provisions relating to payroll and benefits.
- Perform automated payroll data entry.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input timekeeping data into a payroll system.
- Design, prepare, and compile reports and information.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Perform mathematical calculations quickly and accurately.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Completion of 30 semester (or equivalent) units from an accredited college, including 12 units in accounting, business administration or a related field.

AND

Four (4) years of experience requiring technical bookkeeping, payroll accounting, financial clerical or related work, preferably in a public agency. Experience must have included at least two (2) years of experience administering departmental or agency-wide payroll activities.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require



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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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Payroll



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Class Code: Class Code
FLSA Status: Pending

Senior Stock Clerk **Bargaining Unit: VMU**

DEFINITION:

Under general supervision, a Senior Stock Clerk performs lead worker and maintenance support work related to requisitioning, receiving, inspecting, stocking and issuing of a variety of parts, equipment, tools, materials and supplies, including specialized items for facilities maintenance, custodial services, and vehicle maintenance activities; oversees the maintenance of appropriate inventory; performs record-keeping and other administrative support work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Stock Clerk is the advanced-level class in the series. An incumbent in this class serves as a lead worker over subordinate Stock Clerks and also performs tasks requiring advanced knowledge of storekeeping methods as well as related departmental policies, practices, and procedures. This class may be distinguished from the lower-level class of Stock Clerk because an incumbent in the latter class performs the full scope of journey-level work and does not have formal lead worker responsibilities. It may also be distinguished from the higher-level class of Parts and Materials Supervisor as an incumbent in the latter class supervises the work of subordinate 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 Stock Clerks by prioritizing, assigning and monitoring work and providing training as needed; may provide input on performance evaluations.
- Ensures the daily or regular inspection of the parts room and other locations, maintenance of accurate inventory counts, and placement of regular orders to stock items that are frequently requested or ordered in bulk.
- Leads and participates in the requisitioning, receiving, inspecting, stocking and issuing of a variety of materials and supplies requested by multiple departments, including specialized parts, equipment, and tools for facilities maintenance, custodial services, and vehicle maintenance activities.
- Monitors the “out of service” list and updates work orders to show status of orders; provides an estimated time of arrival.
- Assists departments in identifying the more difficult items to be purchased; researches catalogs, parts manuals, the Internet, and other sources; orders parts with vendors online, over the phone, or by submitting purchase requisitions according to METRO policies.
- Prepares budgetary estimates for parts, materials, and supplies.
- Contacts vendors to obtain pricing and availability quotations.
- Reviews vendor selection and performance regarding pricing, customer service, invoicing and returns/credits.
- Leads and participates in the receipt, inspection, and stocking of deliveries from suppliers; compares actual items received against orders to confirm completeness of delivery; delivers items to ordering departments; uses a forklift to unload/load large deliveries, handle and transport hazardous materials, and deliver larger items.

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- Ensures the maintenance and currency of Material Safety Data Sheet (MSDS) records, ensuring that items used or purchased are in the MSDS catalog; conducts a yearly MSDS inventory.
- Monitors accumulated metal, hazardous waste and other items and arranges pick-up for disposal.
- Packages and ships items needing repair or warranty work.
- Inspects forklifts and other equipment to verify safe operation.
- Loads and unloads items on and off armored cars as needed.
- Maintains the parts room in a clean and orderly fashion.
- Assists in vendor selection and monitors vendor performance.
- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents.
- Answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machines; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Standard equipment, parts, tools and supplies required for maintaining light and heavy-duty vehicle systems, and their appropriate storage.
- Standard equipment, parts, and supplies required to maintain a wide variety of non-vehicular equipment and facilities, and their appropriate storage.
- Standard equipment, parts and supplies required for custodial work as well other general operational needs of a transit agency, and their appropriate storage.
- Principles and methods of maintaining a standard inventory of high demand items.
- Methods of determining the availability and best price for equipment, parts, tools, and supplies.
- Standard processes pertaining to purchasing and related data maintenance.
- Modern office practices, procedures, and equipment.
- Methods of maintaining information in digital or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Serve as a lead worker over subordinate Stock Clerks and other clerical and support staff.



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- Lead and participate in the identification and procurement of a wide variety of tools, equipment, parts, supplies and other items requested by customers.
- Research the availability and price of requested items.
- Read and comprehend a variety of technical parts manuals, schematics, and safety-related documentation.
- Coordinate the maintenance of an adequate inventory of high-demand items and ensure their appropriate storage.
- Ensure a safe and organized work area.
- Ensure the safe handling of items hazardous in nature.
- Maintain detailed records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a forklift after receiving appropriate training.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Five (5) years of progressively responsible experience receiving, stocking, issuing and maintaining inventory of automotive and heavy-duty transit parts and supplies.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 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



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

Work Environment:

The employee works in a shop environment where the noise level may be loud and there is potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



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Class Code: Class Code
FLSA Status: Pending

Senior Transportation Planner **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Senior Transportation Planner performs advanced and specialized professional planning duties to support METRO transportation planning functions and processes; conducts the more complex transit planning and service delivery studies and identifies issues; obtains, organizes, analyzes and presents data for transportation-related studies; develops and recommends planning policies; prepares and presents oral and written planning reports; may serve as a lead worker over subordinate professional planning staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Transportation Planner is the advanced-level class in the series. An incumbent in this class performs tasks requiring advanced analysis, interpretation and application of specialized transportation planning laws, regulations, policies and procedures and typically serves as a lead worker over subordinate professional planning staff. This class may be distinguished from the lower-level class of Transportation Planner II because an incumbent in the latter class performs the full scope of journey-level professional planning work. This class may also be distinguished from the higher-level class of Transportation Planning Supervisor because the latter is the supervisory class in the series.

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.

- Performs difficult and complex transit planning and service delivery studies; develops work plans and budget estimates for studies; implements survey techniques and processes; collects and analyzes data and makes recommendations using transportation planning and statistical methods, modeling, and budgeting and financial analyses data; forecasts future transit, transportation, economic or demographic conditions and trends.
- Monitors current transit service levels and identifies potential areas for study; analyzes service delivery parameters such as boarding and alighting and safety concerns; analyzes technical, demographic, economic, and financial data used for assessing route and schedule changes and the development of service enhancements; conducts cost-benefit analyses on service enhancement proposals.
- Analyzes route and schedule performance to determine areas of transit service improvement in terms of efficiency, productivity and effectiveness; assists in planning numbers of stops, length of route and runs per shift for routes according to union/management procedures and cost per mile/hour; prepares written evaluations of proposed route, service, and schedule changes.
- Prepares complex planning reports, forecasts, and recommendations related to transportation system improvements; prepares statistical charts, maps, and other documents to accompany studies, reports and presentations; prepares ridership, on-time performance, productivity, and other route and service measurement reports for the General Manager, Board of Directors and others as requested.
- Develops, interprets, monitors and writes complex transit documents or proposed transportation policies; assists in the development of capital programs, grant applications for transportation



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funds, and the development of capital funding strategies; assists in the development of regional and jurisdictional service plans and cost proposals.

- Reviews and makes recommendations on development applications related to transportation service; provides documents and other information useful for evaluating development applications related to transportation service.
- Briefs members of the public and representatives of community organizations regarding pending and evaluations of and pending changes to routes and service changes as part of an outreach team.
- Responds orally and in writing to requests from the public, staff, governmental agencies, advisory committees and community groups for information regarding existing services and funding, suggested service adjustments and long-range planning issues.
- Performs GIS work including data manipulation/conversion, spatial and statistical analysis, map-making, documentation, technical support and application development.
- Prepares written and graphical information and may make oral presentations on transit and service related issues to the Board of Directors, staff, service users, governmental agencies, advisory committees and community groups.
- Functions as a project lead with other professional staff and consultants.
- May act as METRO's liaison with cities, other local/regional agencies and community groups regarding transportation issues.
- May serve as a lead worker over subordinate professional staff by prioritizing, assigning and monitoring their work and providing training as needed.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles, concepts, goals and technical aspects of transportation planning and capital funding including traffic demand requirements.
- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Physical, environmental, economic, aesthetic and social implications involved in transportation planning and transit-related development.
- Advanced principles of traffic demand management and measures of transit effectiveness used to assess route performance.
- Working knowledge of attractions and locations that generate transit patronage.
- Advanced professional methods of researching, gathering, organizing and reporting data.
- Advanced techniques for surveying and transmitting information.
- Advanced financial and statistical analysis methods.
- Advanced budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.



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- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Advanced project management methods and techniques.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze complex issues and numerical measures associated with transportation planning projects, including estimates derived from computer models, engineering estimates of costs and benefits and public input.
- Develop difficult recommendations for immediate, short and long-range transportation service enhancements and capital requirements based on findings in studies, field observations and public contacts.
- Design and recommend complex transit service changes.
- Participate in a variety of transportation planning outreach activities and effectively advocate and promote the use of public transit.
- Read, analyze, understand and interpret complex scientific and technical journals, financial reports and legal documents.
- Conduct complex cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the field.
- Write letters, memorandums, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Serve as a lead worker over subordinate technical, clerical and support staff.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in urban or regional planning, urban studies, geography, Geographic Information Systems (GIS), public administration, political science, finance or a related field.

AND

Three (3) years of increasingly responsible professional experience performing transportation planning or transportation systems analysis for a public transportation system. Experience must have also included at least two (2) years of recent professional experience working with raw data files and ESRI GIS software to create and analyze spatial data, create high-quality maps, and develop GIS-based solutions/scheduling applications.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certification by the American Institute of Certified Planners (AICP)

OR

Possession of a Professional Transportation Planner (PTP) certificate is desirable.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:



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The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Professional Planning



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Class Code: Class Code
FLSA Status: Pending

Senior Vehicle Service Worker **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Senior Vehicle Services Worker performs lead worker and unskilled vehicle and shop maintenance and service work; oversees the cleaning and maintenance of departmental equipment; coordinates and maintains a variety of service records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Vehicle Service Worker is the advanced-level class in the series. An incumbent in this class leads, coordinates and performs a variety of tasks to ensure that METRO vehicles and equipment provide a safe, clean, and efficient experience for passengers. This position may be distinguished from the lower-level class of Vehicle Service Worker II because an incumbent in the latter class performs journey-level work and does not have lead worker responsibilities.

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; maintains employee attendance records.
- Coordinates staff schedules and assignments.
- Cleans and maintains METRO vehicles and equipment.
- Washes vehicles and equipment.
- Operates automated bus washing equipment.
- Checks fuel, lubrication, coolant, and hydraulic system fluid levels and replenishes as necessary.
- Checks tire wear and inflation.
- Maintains proper service records, including all fuel, oil and hydraulic fluid used on equipment.
- Completes reports on all service work performed.
- Receives and reviews daily records on vehicle mechanical conditions.
- Performs general housekeeping duties in garage and equipment yard.
- Posts and removes internal advertising and notice materials from buses.
- Operates METRO vehicles as necessary.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Automotive maintenance nomenclature.
- Safe work practices.
- Proper use of lubricants and fuels.

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- Standard vehicle servicing procedures.
- Types and usage of cleaning products.
- Application and proper usage of cleaning tools, equipment, and supplies.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Serve as a lead worker over subordinate staff.
- Read, interpret and apply METRO policies, procedures and regulations.
- Understand and follow oral and written instructions.
- Use a variety of cleaning equipment, supplies, solvents and other chemicals safely in the performance of work.
- Follow established safety practices.
- Operate vehicle servicing equipment.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 experience servicing automotive, agricultural and/or construction equipment.

Previous lead worker experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Must be able to obtain a valid California Class B driver license is required.



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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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Stock Clerk **Bargaining Unit: VMU**

DEFINITION:

Under general supervision, a Stock Clerk performs skilled maintenance and clerical support duties related to requisitioning, receiving, inspecting, stocking and issuing of a variety of parts, equipment, tools, materials and supplies including specialized items for facilities maintenance, custodial services, and vehicle maintenance activities; assists departments in identifying the correct items to be purchased; performs periodic inventories and maintains appropriate stock levels of high volume items; may perform general office work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Stock Clerk is the journey-level class in the series. An incumbent in this class performs tasks of average difficulty that require a basic knowledge of storekeeping and purchasing principles and methods as well as general departmental policies, practices, and procedures. This class may be distinguished from the higher-level class of Senior Stock Clerk because an incumbent in the latter class serves as a lead worker over subordinate Stock Clerks and may also perform more difficult work.

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.

- Requisitions, receives, inspects, stocks and issues a variety of materials and supplies requested by multiple departments, including specialized parts, equipment, and tools for facilities maintenance, custodial services, and vehicle maintenance activities.
- Assists departments in identifying the correct items to be purchased by researching catalogs, parts manuals, the Internet, and other sources; orders parts with vendors online, over the phone, or by submitting purchase requisitions according to METRO policies; issues items to departments.
- Receives, inspects and stocks deliveries from suppliers; compares actual items received against orders to confirm completeness of delivery; delivers items to ordering departments; uses a forklift to unload/load large deliveries, handle and transport hazardous materials, and deliver larger items.
- Performs daily or regular inspections of the parts room and other locations as required; maintains accurate inventory counts and keeps records using a computerized inventory system; places regular orders to stock items that are frequently requested.
- Updates Material Safety Data Sheet (MSDS) records, ensuring that items used or purchased are in the MSDS catalog; conducts a yearly MSDS inventory.
- Monitors accumulated metal, hazardous waste and other items and notifies superior of need for disposal.
- Packages and ships items needing repair or warranty work.
- Inspects forklifts and other equipment to verify safe operation.
- Loads and unloads items on and off armored cars as needed.
- Maintains the parts room in a clean and orderly fashion.
- Assists in vendor selection and monitors vendor performance.



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- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents.
- Answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Standard equipment, parts, tools and supplies required for maintaining light and heavy-duty vehicle systems, and their appropriate storage.
- Standard equipment, parts, and supplies required to maintain a wide variety of non-vehicular equipment and facilities, and their appropriate storage.
- Standard equipment, parts and supplies required for custodial work as well other general operational needs of a transit agency, and their appropriate storage.
- Principles and methods of maintaining a standard inventory of high demand items.
- Methods of determining the availability and best price for equipment, parts, tools, and supplies.
- Standard processes pertaining to purchasing and related data maintenance.
- Modern office practices, procedures, and equipment.
- Basic methods of maintaining information in digital or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Identify and procure a wide variety of tools, equipment, parts, supplies and other items requested by customers.
- Research the availability and price of requested items.
- Read and comprehend a variety of technical parts manuals, schematics, and safety-related documentation.
- Maintain an adequate inventory of high-demand items and ensure their appropriate storage.
- Maintain a safe and organized work area.
- Ensure the safe handling of items hazardous in nature.
- Follow oral and written instructions accurately.
- Maintain detailed records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.



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- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a forklift after receiving appropriate training.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of progressively responsible experience receiving, stocking, issuing and maintaining inventory of automotive and heavy-duty transit parts and supplies.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 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; solves problems; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop environment where the noise level may be loud and there is potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.



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*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Systems Administrator I **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Systems Administrator I performs a limited range of professional information technology duties related to the design, development, administration, and maintenance of METRO computer systems; administers LINUX/UNIX and Windows based systems; analyzes and resolves system operation problems including those related to system security, user accounts, network functionality, and client-server hardware; and performs other duties as required.

DISTINGUISHING CHARACTERISTICS:

System Administrator I is the first working-level class in the series. An incumbent in this class performs a limited range of professional analytical technology duties while learning to perform the full scope of journey-level work. This class is distinguished from the Systems Administrator II class because an incumbent in the latter class performs the full range of journey-level professional systems administration work.

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.

- Configures, supports, troubleshoots and administers server environments; ensures servers are patched as needed; restricts access control and monitors server performance; designs multiple solutions for remote access; develops scripts to automate tasks.
- Configures, supports, troubleshoots and administers virtualized environments and ensures they are patched, monitored, and load balanced for power usage; patches servers to the network via ethernet or fiber and organizes accordingly.
- Configures, supports, troubleshoots and administers the Windows Active Directory server; adds, removes and modifies permissions for users and for access control.
- Configures, supports, troubleshoots, and administers network and networking equipment including firewalls, routers, switches, and access points.; creates new subnets; patches networking equipment and terminates cabling; ensures connections are stable; plans and implements upgrades.
- Performs security analysis on an ongoing basis and recommends best practices for security; monitors and mitigates Internet attacks and configures firewall policies to strictly adhere to ongoing threats; creates monthly security bulletins to educate non-technical users to avoid phishing and social engineering attacks; ensures old insecure protocols are retired and replaced with modern secure protocols; configures and monitors intrusion prevention systems.
- Configures, supports, troubleshoots, and administers the telephony network including hardware, endpoints, and connections; adds, removes, or modifies extensions and configures telephony environment for best workflows; manages phone trees; ensures mission-critical phone lines work for customers to book rides and speak with customer service; configures and manages call center helpdesk queues; provides users with the most updated services available.



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- Ensures backups are installed and running accurately; creates backup file systems and tests backups to ensure the quality of backup data; ensures scheduled backups are run and stored securely; plans for disaster recovery; plans and upgrades to modern network attached storage solutions.
- Deploys computers, network/telephone equipment, or troubleshoots onsite.
- Assists customer service with customer accounts; supports various third-party software tools in finance, purchasing, asset tracking, para-transit, telephony, and call center; assists with installation of self-hosted or third-party software.
- Provides desktop support via phone call, email, ticket, or walk in as required.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced computer hardware technology.
- Advanced network security, cryptography, encryption, secure data removal.
- Advanced networking (TCP-IP stack, OSI model, subnetting, switching, routing, wireless).
- Advanced anti-virus technologies.
- Advanced security protocols.
- Advanced Windows Operating systems.
- LINUX Operating systems.
- Citrix Desktop environment.
- VOIP
- Scripting such as Bash, Python, Powershell.
- Workplace safety issues related to the use of computers.
- Remote access technologies.

Ability to:

- Analyze system architecture and design, recommend and implement improvements based on new technologies.
- Work independently to analyze hardware and software problems related to the design and maintenance of computer systems.
- Read and interpret complex technical manuals, procedures, and instructions.
- Clearly and effectively present complex technical information to both technical and non-technical users.
- Analyze and maintain complex computer and networking equipment.
- Install hardware, software, and system upgrades.
- Write user instructions and procedures.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in computer science or a related field.

AND

Two (2) years of professional experience designing and maintaining network and server systems in a Windows, LINUX/UNIX or a similar operating system environment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00



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*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Information Technology Professional



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Class Code: Class Code
FLSA Status: Pending

Systems Administrator II **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Systems Administrator II performs journey-level professional information technology duties related to the design, development, administration, and maintenance of METRO computer systems; administers LINUX/UNIX and Windows based systems; analyzes and resolves system operation problems including those related to system security, user accounts, network functionality, and client-server hardware; and performs other duties as required.

DISTINGUISHING CHARACTERISTICS:

System Administrator II is the journey-level class in the series. An incumbent in this class performs the full range of journey-level professional analytical technology duties. This class is distinguished from the Systems Administrator I class because an incumbent in the latter class performs a limited range of professional systems administration work while learning to perform the full-range of journey-level duties.

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.

- Configures, supports, troubleshoots and administers server environments; ensures servers are patched as needed; restricts access control and monitors server performance; designs multiple solutions for remote access; develops scripts to automate tasks.
- Configures, supports, troubleshoots and administers virtualized environments and ensures they are patched, monitored, and load balanced for power usage; patches servers to the network via ethernet or fiber and organizes accordingly.
- Configures, supports, troubleshoots and administers the Windows Active Directory server; adds, removes and modifies permissions for users and for access control.
- Configures, supports, troubleshoots, and administers network and networking equipment including firewalls, routers, switches, and access points.; creates new subnets; patches networking equipment and terminates cabling; ensures connections are stable; plans and implements upgrades.
- Performs security analysis on an ongoing basis and recommends best practices for security; monitors and mitigates Internet attacks and configures firewall policies to strictly adhere to ongoing threats; creates monthly security bulletins to educate non-technical users to avoid phishing and social engineering attacks; ensures old insecure protocols are retired and replaced with modern secure protocols; configures and monitors intrusion prevention systems.
- Configures, supports, troubleshoots, and administers the telephony network including hardware, endpoints, and connections; adds, removes, or modifies extensions and configures telephony environment for best workflows; manages phone trees; ensures mission-critical phone lines work for customers to book rides and speak with customer service; configures and manages call center helpdesk queues; provides users with the most updated services available.
- Ensures backups are installed and running accurately; creates backup file systems and tests backups to ensure the quality of backup data; ensures scheduled backups are run and stored



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securely; plans for disaster recovery; plans and upgrades to modern network attached storage solutions.

- Deploys computers, network/telephone equipment, or troubleshoots onsite.
- Assists customer service with customer accounts; supports various third-party software tools in finance, purchasing, asset tracking, para-transit, telephony, and call center; assists with installation of self-hosted or third-party software.
- Provides desktop support via phone call, email, ticket, or walk in as required.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced computer hardware technology.
- Advanced network security, cryptography, encryption, secure data removal.
- Advanced networking (TCP-IP stack, OSI model, subnetting, switching, routing, wireless).
- Advanced anti-virus technologies.
- Advanced security protocols.
- Advanced Windows Operating systems.
- LINUX Operating systems.
- Citrix Desktop environment.
- VOIP
- Scripting such as Bash, Python, Powershell.
- Workplace safety issues related to the use of computers.
- Remote access technologies.

Ability to:

- Analyze system architecture and design, recommend and implement improvements based on new technologies.
- Work independently to analyze hardware and software problems related to the design and maintenance of computer systems.
- Read and interpret complex technical manuals, procedures, and instructions.
- Clearly and effectively present complex technical information to both technical and non-technical users.
- Analyze and maintain complex computer and networking equipment.
- Install hardware, software, and system upgrades.
- Write user instructions and procedures.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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:

Bachelor's degree from an accredited college or university with major coursework in computer science or a related field.

AND

Two (2) years of professional experience designing and maintaining network and server systems in a Windows, LINUX/UNIX or a similar operating system environment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Information Technology Professional



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Class Code: Class Code
FLSA Status: Pending

Ticket and Pass Program Specialist Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Ticket and Pass Program Specialist performs bookkeeping, record-keeping and general support duties for METRO's Ticket and Pass Sales Program; distributes METRO tickets and passes to agents/vendors; maintains detailed records pertaining to ticket and pass sales in computerized and hard copy files; verifies cash receipts and prepares bank deposits; orders supplies and maintains ticket/pass stock; gathers and compiles data for statistical or financial reports; provides information to employees and the public; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Ticket and Pass Program Specialist is a journey-level clerical and program support class. An incumbent in this class performs clerical accounting tasks of average difficulty requiring a basic knowledge of bookkeeping principles and methods as well as general departmental policies, practices, and procedures. An incumbent in this class also works with agents and vendors to coordinate day-to-day program operations and to encourage public participation in the program.

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.

- Performs clerical accounting, bookkeeping, record-keeping and general support functions for METRO's Ticket and Pass Sales Program.
- Communicates with ticket agents and vendors to determine the need for METRO tickets and passes and to encourage participation in the program; delivers tickets and passes; records information on past sales and new ticket and pass deliveries; delivers regular orders of tickets and passes to the METRO information booth; may process large quantities of tickets and passes if requested by customers.
- Maintains various records and information in manual and automated files related to ticket and pass sales including sales reports, deposit slips, receipts, invoices, field trip forms, complimentary passes, and other documents; compiles data and prepares reports on sales revenue, cash receipts, and other program activities; develops new or ad hoc reports as requested by management.
- Prepares deposit slips and makes bank deposits according to established protocols.
- Monitors Ticket Vending Machine (TVM) sales; contacts maintenance as needed to repair machines; meets with security staff on a regular basis to retrieve revenues from TVM's and refill machines with change; counts and deposits TVM revenues; orders change to refill machines; updates program records with revenue information.
- Responds to ticket and pass requests received through Internet sales; prepares and mails orders; updates customer information on the METRO website; assists customers with establishing METRO website accounts.
- Provides program information and orientation to potential and new ticket agents and vendors on how the program works and their role in selling tickets and passes; solicits new potential agents; provides agents with marketing materials.
- Develops procedures for own work.

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- Communicates with outside contractors during periodic audits.
- Maintains inventories and orders supplies.
- Types memoranda, letters, reports, contracts, purchase orders, statistical data, specifications, and other documents as directed.
- Answers telephones and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic bookkeeping methods.
- Basic clerical processes pertaining to accounting, purchasing, and data maintenance.
- Modern office practices, procedures, and equipment.
- Basic methods of maintaining information in digital or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Perform clerical accounting, bookkeeping, record-keeping, and field work with substantial independence, good judgment, and discretion.
- Follow oral and written instructions accurately.
- Devise and adapt work procedures to meet changing needs.
- Understand the relationship between account records and documents for recording and reporting purposes.
- Perform routine reconciliations within a record-keeping system.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Type correspondence and routine documents.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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:

Two (2) years of clerical accounting, bookkeeping or financial record-keeping experience.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

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 often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 25 pounds unaided may be required. 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; uses basic math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate. May work out in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Financial Administrative Support



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Class Code: Class Code
FLSA Status: Pending

Transit Supervisor **Bargaining Unit: PSA**

DEFINITION:

Under direction, a Transit Supervisor performs supervisory and transit operations work related to directing and coordinating the daily operation of METRO's bus fleet; schedules and dispatches Bus Operators; ensures that assigned operations comply with applicable laws, regulations, policies, and procedures; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Transit Supervisor is a supervisory transit operations classification. In addition to required supervisory duties, an incumbent in this class primarily performs either Bus Operator field dispatching or scheduling. However, an incumbent will also be cross-trained to ensure adequate coverage across all areas and must, therefore, be able to perform the full range of class functions.

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.

- Supervises subordinate staff; assigns, directs, schedules, and monitors work; provides staff training; evaluates employee performance; counsels subordinate staff; initiates or has significant input into disciplinary actions; may testify in disciplinary hearings.
- Participates in the recruitment, selection, and on-boarding process of new departmental employees.
- Performs a variety of timekeeping duties; reviews and approves or disapproves overtime and time off; records time off requests in compliance with labor agreement(s); tracks attendance and monitors attendance incentive records; prepares daily extra-board schedule; completes related paperwork for all Operations Yards; coordinates various timekeeping functions with operations departments.
- Establishes and maintains timekeeping-related data, records, and documents, including but not limited to, annual leave calendar, sick calls and general leave of absence calendar in accordance with applicable labor contract(s); notifies Bus Operators of changes as required.
- Responds to issues in the field, including but not limited to, farebox issues, mechanical problems, route delays, passenger problems, and unusual or emergency situations both on buses or at bus stops.
- Assists in investigating accidents and incidents on METRO buses and property; completes required paperwork and reports; identifies causes of accidents and recommends the follow up action, if needed.
- Schedules random, reasonable suspicion, and post-accident drug and alcohol testing of Bus Operators in compliance with Department of Transportation (DOT) and Federal Transit Administration (FTA) regulations.
- Receives and investigates complaints, completes required paperwork, and recommends the follow up action, as appropriate.

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- Monitors two-way radio system and in-field operations, ensuring compliance with Federal and State regulations and METRO operating procedures; communicates with maintenance and other departments as needed; operates the base radio station and directs operators over the radio as necessary; dispatches road supervisory personnel.
- Prepares daily coach and operator schedules; prepares operator paddles and other materials; performs in-field bus exchanges and transports Bus Operators when needed; replaces Operators as necessary; assigns buses and replacement buses as needed.
- Coordinates scheduling with a variety of agencies, including Caltrans and law enforcement, to work around detours related to emergencies, construction, special events, or other situations.
- Adds or drops individual runs based on available resources, ensuring compliance with applicable labor contract provisions.
- May assist in planning and evaluating routes, route extensions, deletions, schedule time points, and other system modifications.
- Participates in the quarterly bid process as assigned.
- May testify in court and represent METRO in court appearances as directed.
- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information; types correspondence and other documents; provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Attends a variety of meetings as directed.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Applicable Federal, State, and local laws and regulations pertaining to the area of assignment, including State Vehicle Codes as well as Cal-OSHA, DOT and FTA regulations.
- METRO labor contracts.
- Local and regional transportation services.
- Principles and practices of effective transit bus operations.
- Modern office practices, procedures, and equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.



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Ability to:

- Supervise and motivate subordinate staff effectively.
- Interpret, explain, and ensure compliance with relevant laws, policies, regulations, and requirements.
- Learn radio procedures and operate a base radio station.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of progressively responsible experience as a Transit Bus Operator with Santa Cruz Metro.

OR

Three (3) years of progressively responsible experience as a public transit bus operator.

AND

Previous experience serving as a lead worker is desirable.

LICENSES AND CERTIFICATES:

A valid California Class B driver license with passenger endorsement and safe driving record are required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Driving record will be reviewed as part of the application process.

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



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While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 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; solves problems; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in an office environment where the noise level is usually moderate. The employee occasionally works in a field environment with potential exposure to varied weather conditions, dust, fumes, and hazardous materials and where the noise level is loud.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Required to be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Transit Operations



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Class Code: Class Code
FLSA Status: Pending

Transportation Planner I **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Transportation Planner I performs a limited range of professional planning duties in support of METRO transportation planning functions and processes; conducts transit planning and service delivery studies and identifies issues; obtains, organizes, analyzes and presents data for transportation-related studies; participates in planning policy development; assists in the preparation and presentation of oral and written reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Transportation Planner I is the entry-level class in the series. An incumbent in this class performs tasks requiring a general interpretation and application of specialized transportation planning laws, regulations, policies and procedures. This class may be distinguished from the higher-level class of Transportation Planner II because an incumbent in the latter class performs the full scope of journey-level professional planning work.

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.

- Performs a limited range of professional planning duties in support of METRO transportation planning functions and processes while learning to perform the full scope of journey-level professional work.
- Performs a variety of transit planning and service delivery studies; develops work plans and budget estimates for studies; implements survey techniques and processes; collects and analyzes data and makes recommendations using transportation planning and statistical methods, modeling, and budgeting and financial analyses data; forecasts future transit, transportation, economic or demographic conditions and trends.
- Monitors current transit service levels and identifies potential areas for study; analyzes service delivery parameters such as boarding and alighting and safety concerns; analyzes technical, demographic, economic, and financial data used for assessing route and schedule changes and the development of service enhancements; conducts cost-benefit analyses on service enhancement proposals.
- Analyzes route and schedule performance to determine areas for transit service improvement in terms of efficiency, productivity and effectiveness; assists in planning numbers of stops, length of route and runs per shift for routes according to union/management procedures and cost per mile/hour; prepares written evaluations of proposed route, service, and schedule changes.
- Prepares planning reports, forecasts, and recommendations related to transportation system improvements; prepares statistical charts, maps, and other documents to accompany studies, reports and presentations; prepares ridership, on-time performance, productivity, and other route and service measurement reports for the General Manager, Board of Directors and others as requested.
- Develops, interprets, monitors and writes transit documents or proposed transportation policies; assists in the development of capital programs, grant applications for transportation funds, and



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the development of capital funding strategies; assists in the development of regional and jurisdictional service plans and cost proposals.

- Reviews and makes recommendations on development applications related to transportation service; provides documents and other information useful for evaluating development applications related to transportation service.
- As part of an outreach team, briefs members of the public and representatives of community organizations regarding pending and evaluations of and pending changes to routes and service changes as part of an outreach team.
- Responds orally and in writing to requests from the public, staff, governmental agencies, advisory committees and community groups for information regarding existing services and funding, suggested service adjustments and long-range planning issues.
- Performs GIS work including data manipulation/conversion, spatial and statistical analysis, map-making, documentation, technical support and application development.
- Prepares written and graphical information and may make oral presentations on transit and service related issues to the Board of Directors, staff, service users, governmental agencies, advisory committees and community groups.
- May function as a project lead with other professional staff and consultants.
- May act as METRO's liaison with cities, other local/regional agencies and community groups regarding transportation issues.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, concepts, goals and technical aspects of transportation planning and capital funding including traffic demand requirements.
- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Physical, environmental, economic, aesthetic and social implications involved in transportation planning and transit-related development.
- Principles of traffic demand management and measures of transit effectiveness used to assess route performance.
- Working knowledge of attractions and locations that generate transit patronage.
- Professional methods of researching, gathering, organizing and reporting data.
- Techniques for surveying and transmitting information.
- Financial and statistical analysis methods.
- Budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.
- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Project management methods and techniques.



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- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze issues and numerical measures associated with transportation planning projects, including estimates derived from computer models, engineering estimates of costs and benefits and public input.
- Develop recommendations for immediate, short-, and long-range transportation service enhancements and capital requirements based on findings in studies, field observations and public contacts.
- Design and recommend transit service changes.
- Participate in a variety of transportation planning outreach activities and effectively advocate and promote the use of public transit.
- Read, analyze, understand and interpret complex scientific and technical journals, financial reports and legal documents.
- Conduct cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the field.
- Write letters, memoranda, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the general public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.



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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:

Bachelor's degree from an accredited college or university with major coursework in urban or regional planning, urban studies, geography, Geographic Information Systems (GIS), public administration, political science, finance or a related field.

AND

Recent experience working with raw data files and ESRI GIS software to create and analyze spatial data, create high-quality maps, and develop GIS-based solutions/scheduling applications is desirable.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certification by the American Institute of Certified Planners (AICP) or

OR

Possession of a Professional Transportation Planner (PTP) certificate is desirable.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.



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- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Professional



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Class Code: Class Code
FLSA Status: Pending

Transportation Planner II **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Transportation Planner II performs the full range of journey-level professional planning duties in support of METRO transportation planning functions and processes; conducts transit planning and service delivery studies and identifies issues; obtains, organizes, analyzes and presents data for transportation-related studies; participates in planning policy development; prepares and presents oral and written reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Transportation Planner II is the journey-level class in the professional planning series. An incumbent in this class performs professional planning tasks requiring analysis, interpretation and application of specialized transportation planning laws, regulations, policies and procedures. This class may be distinguished from the lower-level class of Transportation Planner I because an incumbent in the latter class performs a limited range of duties while learning to perform the full scope of journey-level professional planning work. This class can also be distinguished from the higher-level class of Senior Transportation Planner because an incumbent in the latter class performs advanced and specialized professional planning work and typically serves as a lead worker over subordinate professional 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.

- Performs the full scope of journey-level, professional planning duties in support of METRO transportation planning functions and processes.
- Performs a variety of transit planning and service delivery studies; develops work plans and budget estimates for studies; implements survey techniques and processes; collects and analyzes data and makes recommendations using transportation planning and statistical methods, modeling, and budgeting and financial analyses data; forecasts future transit, transportation, economic or demographic conditions and trends.
- Monitors current transit service levels and identifies potential areas for study; analyzes service delivery parameters such as boarding and alighting and safety concerns; analyzes technical, demographic, economic, and financial data used for assessing route and schedule changes and the development of service enhancements; conducts cost-benefit analyses on service enhancement proposals.
- Analyzes route and schedule performance to determine areas for transit service improvement in terms of efficiency, productivity and effectiveness; assists in planning numbers of stops, length of route and runs per shift for routes according to union/management procedures and cost per mile/hour; prepares written evaluations of proposed route, service, and schedule changes.
- Prepares planning reports, forecasts, and recommendations related to transportation system improvements; prepares statistical charts, maps, and other documents to accompany studies, reports and presentations; prepares ridership, on-time performance, productivity, and other route and service measurement reports for the General Manager, Board of Directors and others as requested.



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- Develops, interprets, monitors and writes transit documents or proposed transportation policies; assists in the development of capital programs, grant applications for transportation funds, and the development of capital funding strategies; assists in the development of regional and jurisdictional service plans and cost proposals.
- Reviews and makes recommendations on development applications related to transportation service; provides documents and other information useful for evaluating development applications related to transportation service.
- Briefs members of the public and representatives of community organizations regarding pending changes to routes and service changes as part of an outreach team.
- Responds orally and in writing to requests from the public, staff, governmental agencies, advisory committees and community groups for information regarding existing services and funding, suggested service adjustments and long-range planning issues.
- Performs GIS work including data manipulation/conversion, spatial and statistical analysis, map-making, documentation, technical support and application development.
- Prepares written and graphical information and may make oral presentations on transit and service related issues to the Board of Directors, staff, service users, governmental agencies, advisory committees and community groups.
- May function as a project lead with other professional staff and consultants.
- May act as METRO's liaison with cities, other local/regional agencies and community groups regarding transportation issues.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, concepts, goals and technical aspects of transportation planning and capital funding including traffic demand requirements.
- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Physical, environmental, economic, aesthetic and social implications involved in transportation planning and transit-related development.
- Principles of traffic demand management and measures of transit effectiveness used to assess route performance.
- Working knowledge of attractions and locations that generate transit patronage.
- Professional methods of researching, gathering, organizing and reporting data.
- Techniques for surveying and transmitting information.
- Financial and statistical analysis methods.
- Budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.
- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.



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- Project management methods and techniques.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze issues and numerical measures associated with transportation planning projects, including estimates derived from computer models, engineering estimates of costs and benefits and public input.
- Develop recommendations for immediate, short, and long-range transportation service enhancements and capital requirements based on findings in studies, field observations and public contacts.
- Design and recommend transit service changes.
- Participate in a variety of transportation planning outreach activities and effectively advocate and promote the use of public transit.
- Read, analyze, understand and interpret complex scientific and technical journals, financial reports and legal documents.
- Conduct cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the field.
- Write letters, memoranda, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.



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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:

Bachelor's degree from an accredited college or university with major coursework in urban or regional planning, urban studies, geography, Geographic Information Systems (GIS), public administration, political science, finance or a related field.

AND

Three (3) years of increasingly responsible professional experience performing transportation planning or transportation systems analysis for a public transportation system. Experience must have also included at least two (2) years of recent professional experience working with raw data files and ESRI GIS software to create and analyze spatial data, create high-quality maps, and develop GIS-based solutions/scheduling applications.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certification by the American Institute of Certified Planners (AICP)

OR

Possession of a Professional Transportation Planner (PTP) certificate is desirable.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Professional



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Class Code: Class Code
FLSA Status: Pending

Transportation Planning Supervisor **Bargaining Unit: PSA**

DEFINITION:

Under general direction, a Transportation Planning Supervisor performs supervisory and advanced professional planning duties to support METRO transportation planning functions and processes; supervises the implementation of transit planning and service delivery studies and the identification of issues; directs and supervises the gathering, organizing, analysis and presentation of data for transportation-related studies; develops and recommends planning policies; directs and supervises the preparation and presentation of oral and written planning reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Transportation Planner is the supervisory-level class in the series. An incumbent in this class supervises and performs tasks requiring analysis, interpretation and application of specialized transportation planning laws, regulations, policies and procedures. This class may be distinguished from the lower-level class of Senior Transportation Planner because an incumbent in the latter class performs advanced and specialized professional planning work and typically serves as a lead worker over subordinate professional 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.

- Supervises subordinate professional planning staff and may supervise technical, clerical or support staff; assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Performs difficult and complex transit planning and service delivery studies; develops work plans and budget estimates for studies; implements survey techniques and processes; collects and analyzes data and makes recommendations using transportation planning and statistical methods, modeling, and budgeting and financial analyses data; forecasts future transit, transportation, economic or demographic conditions and trends.
- Monitors current transit service levels and identifies potential areas for study; analyzes service delivery parameters such as boarding and alighting and safety concerns; analyzes technical, demographic, economic, and financial data used for assessing route and schedule changes and the development of service enhancements; conducts cost-benefit analyses on service enhancement proposals.
- Analyzes route and schedule performance to determine areas of transit service improvement in terms of efficiency, productivity and effectiveness; assists in planning numbers of stops, length of route and runs per shift for routes according to union/management procedures and cost per mile/hour; prepares written evaluations of proposed route, service, and schedule changes.
- Prepares complex planning reports, forecasts, and recommendations related to transportation system improvements; prepares statistical charts, maps, and other documents to accompany studies, reports and presentations; prepares ridership, on-time performance, productivity, and

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other route and service measurement reports for the General Manager, Board of Directors and others as requested.

- Develops, interprets, monitors and writes complex transit documents or proposed transportation policies; assists in the development of capital programs, grant applications for transportation funds, and the development of capital funding strategies; assists in the development of regional and jurisdictional service plans and cost proposals.
- Reviews and makes recommendations on development applications related to transportation service; provides documents and other information useful for evaluating development applications related to transportation service.
- Briefs members of the public and representatives of community organizations regarding pending and evaluations of and pending changes to routes and service changes as part of an outreach team.
- Responds orally and in writing to requests from the public, staff, governmental agencies, advisory committees and community groups for information regarding existing services and funding, suggested service adjustments and long-range planning issues.
- Performs GIS work including data manipulation/conversion, spatial and statistical analysis, map-making, documentation, technical support and application development.
- Prepares written and graphical information and may make oral presentations on transit and service related issues to the Board of Directors, staff, service users, governmental agencies, advisory committees and community groups.
- Functions as a project lead with other professional staff and consultants.
- May act as METRO's liaison with cities, other local/regional agencies and community groups regarding transportation issues.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Advanced principles, concepts, goals and technical aspects of transportation planning and capital funding including traffic demand requirements.
- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Physical, environmental, economic, aesthetic and social implications involved in transportation planning and transit-related development.
- Advanced principles of traffic demand management and measures of transit effectiveness used to assess route performance.
- Attractions and locations that generate transit patronage.
- Advanced professional methods of researching, gathering, organizing and reporting data.
- Advanced techniques for surveying and transmitting information.



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- Advanced financial and statistical analysis methods.
- Advanced budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.
- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Advanced project management methods and techniques.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Effectively supervise and motivate subordinate staff.
- Analyze complex issues and numerical measures associated with transportation planning projects, including estimates derived from computer models, engineering estimates of costs and benefits and public input.
- Develop difficult recommendations for immediate, short-, and long-range transportation service enhancements and capital requirements based on findings in studies, field observations and public contacts.
- Design and recommend complex transit service changes.
- Participate in a variety of transportation planning outreach activities and effectively advocate and promote the use of public transit.
- Read, analyze, understand and interpret complex scientific and technical journals, financial reports and legal documents.
- Conduct complex cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the field.
- Write letters, memorandums, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.



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- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

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:

Bachelor's degree from an accredited college or university with major coursework in urban or regional planning, urban studies, geography, Geographic Information Systems (GIS), public administration, political science, finance or a related field.

AND

Six (6) years of increasingly responsible professional experience performing transportation planning or transportation systems analysis for a public transportation system. Experience must have also included at least three (3) years of recent professional experience working with raw data files and ESRI GIS software to create and analyze spatial data, create high-quality maps, and develop GIS-based solutions/scheduling applications.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certification by the American Institute of Certified Planners (AICP)

OR

Possession of a Professional Transportation Planner (PTP) certificate is desirable.

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 stooping at the waist and the repetitive use of both hands to grasp and feel objects. 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; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:



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The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Professional Planning



Attachment C

Class Code: Class Code
FLSA Status: Pending

Upholsterer I **Bargaining Unit: VMU**

DEFINITION:

Under general direction, an Upholsterer I performs a limited range of skilled duties related to upholstery and minor structural repairs for METRO vehicles while learning to perform the full-scope of journey-level work; repairs seat cushions, backrests, and flooring; assists with minor vehicle body and framework repairs; replaces and repairs windows and glass; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Upholsterer I is the first working-level class in the series. An incumbent in this class performs a limited range of skilled tasks to ensure that vehicle upholstery and other structural vehicle components are safe and comfortable for passengers and operators. This position is distinguished from the higher-level class of Upholsterer II because an incumbent in the latter class performs the full scope of journey-level upholstery work.

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.

- Performs a limited range of skilled tasks in the maintenance of and repairs to the upholstery of buses, METRO equipment, and vehicles while learning to perform the full scope of journey-level work.
- Operates power sewing machine and other related upholstery equipment and tools.
- Drafts patterns for seat cushions, backrests, and flooring.
- Cuts and installs upholstery for seats and backrests.
- Sews, fastens and welts upholstery materials for METRO vehicles.
- Repairs and replaces seat springs and cushions.
- Constructs, rebuilds and/or repairs seat assemblies for METRO vehicles and equipment.
- Makes minor body repairs including: removing, disassembling, straightening, repairing, fitting, and replacing damaged body panels and other major component parts or systems; Repairing body dents or scratches and preparing for painting; Repairing or replacing damaged windows, mirrors, glass or laminates; Repairing, replacing and maintaining interior flooring, side and ceiling panels.
- Assists with final preparation and detailing of METRO vehicles.
- Monitors the interior condition of vehicles and equipment and recommends repairs as needed.
- Recommends the purchase of tools, supplies, materials, and equipment needed for upholstery, body and glass repairs.
- Assists with maintaining an inventory of parts and tools for the upholstery shop.
- Maintains clean a working area.
- Maintains METRO property, tools and equipment provided.
- Performs pickup and delivery functions to satellite facilities.
- May assist with emergency road service calls and operate buses for maintenance purposes.
- Maintains written records of repairs on work orders.
- May provide work coordination and training for Upholsterer I incumbents, as assigned.



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- Operates a personal computer and standard business software.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic principles and practices of upholstery.
- Basic upholstery cleaning methods and supplies.
- Basic methods and materials used in the construction and repair of seat covers and backrests as well as the reconstruction and repair of seat assemblies, including springs, electrical, pneumatic/hydraulic and mechanical seat assemblies.
- Operation of a power sewing machine and related equipment, as well as hand tools used in the upholstery trade.
- Basic pattern drafting.
- General shop safety procedures, including the use of trade tools and personal safety equipment.
- Methods of performing routine automotive body repairs including spot painting.
- Occupational Safety and Health Standards applicable to bodywork and painting.
- Hazardous materials handling, disposal and safety practices.
- Methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Operate a power sewing machine and other tools and equipment used in the repair and maintenance of METRO vehicles.
- Read and understand technical information.
- Read, interpret and apply pattern instructions to measure, cut and sew padding and material accurately.
- Perform basic upholstery work using a variety of materials, including cloth, vinyl, canvas, and leather.
- Estimate material and labor costs.
- Reconstruct and repair seat assemblies.
- Perform minor vehicle body repairs.
- Operate a variety of vehicles and equipment, including forklifts, pallet jacks, and utility vehicles.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.



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- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

One (1) year of progressively responsible experience in vehicle upholstery.

OR

Completion of an upholstering apprenticeship program.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

The ability to obtain a valid California Class B driver's license is required.

SPECIAL REQUIREMENTS:

- Possession of, or ability to obtain, the tools necessary to perform the duties of the position.

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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Maintenance



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Class Code: Class Code
FLSA Status: Pending

Upholsterer II **Bargaining Unit: VMU**

DEFINITION:

Under general direction, an Upholsterer II performs skilled work related to upholstery and minor structural repairs for METRO vehicles; repairs seat cushions, backrests, and flooring; assists with minor vehicle body and framework repairs; replaces and repairs windows and glass; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Upholsterer II is the journey-level class in the series. An incumbent in this class performs a variety of skilled tasks to ensure that vehicle upholstery and other structural vehicle components are safe and comfortable for passengers and operators. This position is distinguished from the lower-level class of Upholsterer I because an incumbent in the latter class performs a limited range of duties while learning to perform the full scope of journey-level upholstery work.

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.

- Performs a variety of skilled tasks in the maintenance of and repairs to the upholstery of buses, METRO equipment, and vehicles.
- Operates power sewing machine and other related upholstery equipment and tools.
- Drafts patterns for seat cushions, backrests, and flooring.
- Cuts and installs upholstery for seats and backrests.
- Sews, fastens and welts upholstery materials for METRO vehicles.
- Repairs and replaces seat springs and cushions.
- Constructs, rebuilds and/or repairs seat assemblies for METRO vehicles and equipment.
- Makes minor body repairs including: removing, disassembling, straightening, repairing, fitting, and replacing damaged body panels and other major component parts or systems.; Repairing body dents or scratches and preparing for painting; Repairing or replacing damaged windows, mirrors, glass or laminates; Repairing, replacing and maintaining interior flooring, side and ceiling panels.
- Assists with final preparation and detailing of METRO vehicles.
- Monitors the interior condition of vehicles and equipment and recommends repairs as needed.
- Recommends the purchase of tools, supplies, materials, and equipment needed for upholstery, body and glass repairs.
- Assists with maintaining an inventory of parts and tools for the upholstery shop.
- Maintains clean a working area.
- Maintains METRO property, tools and equipment provided.
- Performs pickup and delivery functions to satellite facilities.
- May assist with emergency road service calls and operate buses for maintenance purposes.
- Maintains written records of repairs on work orders.
- May provide work coordination and training for Upholsterer I incumbents, as assigned.



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- Operates a personal computer and standard business software.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of upholstery.
- Effective upholstery cleaning methods and supplies.
- Methods and materials used in the construction and repair of seat covers and backrests as well as the reconstruction and repair of seat assemblies, including springs, electrical, pneumatic/hydraulic and mechanical seat assemblies.
- Operation of a power sewing machine and related equipment, as well as hand tools used in the upholstery trade.
- Pattern drafting.
- General shop safety procedures, including the use of trade tools and personal safety equipment.
- Methods of performing routine automotive body repairs including spot painting.
- Occupational Safety and Health Standards applicable to bodywork and painting.
- Hazardous materials handling, disposal and safety practices.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Operate a power sewing machine and other tools and equipment used in the repair and maintenance of METRO vehicles.
- Read and understand technical information.
- Read, interpret and apply pattern instructions to measure, cut and sew padding and material accurately.
- Perform upholstery work using a variety of materials, including cloth, vinyl, canvas, and leather.
- Estimate material and labor costs.
- Reconstruct and repair seat assemblies.
- Perform minor vehicle body repairs.
- Operate a variety of vehicles and equipment, including forklifts, pallet jacks, and utility vehicles.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of progressively responsible experience performing vehicle upholstery.

OR

Completion of an upholstery apprenticeship program AND one (1) year of progressively responsible experience in vehicle upholstery.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

The ability to obtain a valid California Class B driver's license is required.

SPECIAL REQUIREMENTS:

- Possession of, or ability to obtain, the tools necessary to perform the duties of the position.

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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



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Class Code: Class Code
FLSA Status: Pending

Vehicle Body Repair Mechanic **Bargaining Unit: VMU**

DEFINITION:

Under general supervision, a Vehicle Body Repair Mechanic performs maintenance work related to repairing and restoring damaged district vehicles to Original Equipment Manufacturer (OEM) specifications; maintains and repairs bus interiors, destination signs, windows and mirrors; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Body Repair Mechanic is a journey-level maintenance class. An incumbent in this class performs tasks to ensure the fleet's body structures and appearances are maintained in an acceptable condition.

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.

- Repairs damaged bodywork on District vehicles and equipment, including removing, disassembling, straightening, fitting, painting, frame measuring, and replacing damaged body panels or other component parts or systems.
- Inspects vehicles and equipment for damage; prepares estimates of labor, materials, and cost of repair; recommends parts repair or replacement.
- Recommends vehicle repairs by outside firms when needed; inspects work performed on District vehicles by repair and body shops.
- Repairs and replaces damaged windows, glass, and mirrors; maintains and repairs destination signs; repairs, replaces, and maintains interior flooring and side and ceiling panels; repairs and installs fiberglass and plastic parts.
- Wires and troubleshoots air systems; fabricates vehicles body parts by machining, welding or joining; performs metal shrinking.
- Operates and maintains a variety of manual and power equipment including, but not limited to, welding and cutting equipment, hammers, spoons, dollies, sanders, windshield cutters, measuring devices, friction jacks, grinders, hydraulic press, and electrical pliers and testers.
- Operates and maintains paint booth equipment; performs paint mixing, application of primer, color matching, clear coating, buffing, striping, wet sanding, waxing, detailing, blocking, blending, back taping, side mold installation, and brush touch-up.
- Maintains records of repairs on work orders.
- Communicates with vendors such as body repair shops and paint and equipment suppliers, as well as other staff.
- Trains departmental staff to assist in body repair tasks.
- Maintains District property, tools, and equipment; cleans work area, tools, and equipment; maintains a safe work environment, follows proper procedures for handling hazardous materials, and utilizes appropriate safety gear, apparel, and equipment.
- May recommend needs for tooling, equipment, materials, and supplies.
- Performs emergency repairs on road calls.

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- Maintains accurate written and electronic records, logs and work orders.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Methods, materials, hand tools and power equipment used in the repair and painting of buses, cars, vans, and trucks.
- Structure of vehicles, including the characteristics of the metals, plastics, and compounds used in vehicle construction.
- Principles and practices of bus and automotive body repair and painting.
- Safe work practices including working with hazardous materials and proper equipment operating procedures.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Repair body and frame damage to vehicles and equipment.
- Understand and follow oral and written instructions.
- Operate welding equipment, grinders, presses, sanders, and other equipment used in the repair and painting of District vehicles.
- Estimate labor hours, cost of parts and materials, and types of materials necessary to repair and paint a vehicle.
- Perform mathematical calculations accurately.
- Read and comprehend technical manuals and schematics.
- Perform heavy physical labor and work from ladders and scaffolds.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

One (1) year of progressively responsible, journey-level experience in vehicle body repair and painting.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Maintenance



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Class Code: Class Code
FLSA Status: Pending

Vehicle Service Detailer **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Vehicle Service Detailer performs maintenance work related to detailing and servicing METRO vehicles and equipment; performs semi-skilled minor repairs to bus interiors; assists with the replacement of seat cushions and backrests; may assist in semi-skilled minor body repairs as directed; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Vehicle Service Detailer is a journey-level class. An incumbent in this class performs tasks that ensure that METRO vehicles and equipment are thoroughly cleaned and maintained for the comfort of passengers and Bus Operators.

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.

- Performs a variety of skilled tasks in detailing, cleaning interiors of buses, equipment, and other METRO vehicles.
- Assists in the replacement of seat cushions and backrests, side panels and window trims; may assist in the semi-skilled repairs and replacement of body interiors as directed.
- Cleans tires and paints vehicle wheels, fareboxes, and other minor interior items with canned spray paint, brush and other chemical cleaning materials.
- May assist body shop personnel in the removal of masking paper and tape prior to detailing of buses and other METRO vehicles.
- Washes METRO buses and other vehicles with automated bus washing equipment.
- Vacuums or sweeps interiors of METRO vehicles.
- Empties trash receptacles on buses.
- Washes and scrubs floors, walls, and ceiling of bus interiors; removes all gum from floor and graffiti from seats, side panels, and ceiling.
- Waxes bus floors.
- Performs general housekeeping duties in maintenance facilities and equipment yard.
- Checks fuels, lubricants, coolant on METRO vehicles and replenishes as necessary.
- Checks tire wear and inflation level.
- Maintains proper service records, including all fuel, oil and hydraulic fluids used on equipment.
- Completes daily reports on all detailing work performed.
- May drive buses and vehicles between facilities for servicing and detailing as directed.
- Maintains accurate written and electronic records, logs and work orders.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.



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- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Automotive nomenclature.
- Proper use of lubricants and fuels.
- Various vehicle service functions.
- Types and use of cleaning products.
- Application and proper use of cleaning tools, equipment, and supplies.
- Hazards and safety precautions of the trade.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Read, interpret and apply METRO policies, procedures and regulations.
- Use a variety of cleaning equipment, supplies, solvents, and other chemicals safely in the performance of work.
- Operate power hand tools such as drills, grinders, sanders, air impact wrenches, and other tools used in the detailing of METRO buses and equipment.
- Perform minor touch-up painting on METRO buses and other vehicles.
- Give and follow both written and oral instructions.
- Follow established safety practices.
- Physically operate service equipment.
- Work outdoors at night.
- Work a flexible schedule, including weekdays, nights, and weekends.
- Work under deadlines and schedules.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of progressively responsible experience detailing, servicing and performing minor repairs on automotive, agricultural, and/or construction equipment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the



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time of appointment and throughout employment.

Must be able to obtain a valid California Class B driver license is required.

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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Vehicle Service Worker I **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Vehicle Services Worker I performs a limited range of unskilled vehicle service and shop maintenance duties while learning to perform the full scope of journey-level work; cleans and maintains departmental equipment; maintains a variety of service records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Vehicle Service Worker I is the first working-level class in the series. An incumbent in this class performs the most routine vehicle service and shop maintenance tasks to maintain METRO vehicles and equipment. This class may be distinguished from the higher-level class of Vehicle Service Worker II because an incumbent in the latter class performs the full scope of journey-level work.

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.

- Cleans and maintains departmental equipment.
- Vacuums, sweeps and/or mops interior of buses and other METRO vehicles.
- Empties trash receptacles on buses.
- Washes METRO vehicles.
- Operates automated bus washing equipment.
- Cleans windows in METRO vehicles.
- Checks fuel, lubrication, coolant, and hydraulic system fluid levels and replenishes as necessary.
- Checks tire wear and inflation.
- Maintains proper service records, including all fuel, oil and hydraulic fluid used on equipment.
- Completes reports on all service work performed.
- Performs general housekeeping duties in garage and equipment yard.
- Posts and removes internal advertising and notice materials from buses.
- Drives METRO buses and vehicles between yards for servicing as directed.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Automotive maintenance nomenclature.
- Safe work practices.
- Proper use of lubricants and fuels.
- Standard vehicle service procedures.
- Types and usage of cleaning products.
- Application and proper use of cleaning tools, equipment, and supplies.
- Methods of maintaining information in digital or hard copy files.



Attachment C

- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Read, interpret and apply METRO policies, procedures and regulations.
- Understand and follow oral and written instructions.
- Use a variety of cleaning equipment, supplies, solvents, and other chemicals safely in the performance of work.
- Follow established safety practices.
- Operate vehicle servicing equipment.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

One (1) year of experience servicing automotive, agricultural and/or construction equipment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Must be able to obtain a valid California Class B driver license is required.

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



Attachment C

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Maintenance



Attachment C

Class Code: Class Code
FLSA Status: Pending

Vehicle Service Worker II **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Vehicle Services Worker II performs unskilled vehicle service and shop maintenance work; cleans and maintains departmental equipment; maintains a variety of service records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Vehicle Service Worker II is the journey-level class in the series. An incumbent in this class performs journey-level unskilled tasks to maintain METRO vehicles and equipment. This class is distinguished from the lower-level class of Vehicle Service Worker I because an incumbent in the latter class performs a limited range of routine duties while learning to perform the full scope of journey-level work. It is also distinguished from the higher-level class of Senior Vehicle Service Worker because an incumbent in the latter class serves as a lead worker over subordinate 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.

- Cleans and maintains departmental equipment.
- Vacuums, sweeps and/or mops interior of buses and other METRO vehicles.
- Empties trash receptacles on buses.
- Washes METRO vehicles and equipment.
- Operates automated bus washing equipment.
- Cleans windows in METRO vehicles.
- Checks fuel, lubrication, coolant, and hydraulic system fluid levels and replenishes as necessary.
- Checks tire wear and inflation.
- Maintains proper service records, including all fuel, oil and hydraulic fluid used on equipment.
- Completes reports on all service work performed.
- Performs general housekeeping duties in garage and equipment yard.
- Posts and removes internal advertising and notice materials from buses.
- Drives METRO buses and vehicles between yards for servicing as directed.
- May assist with training Vehicle Service Worker I's if assigned.
- Maintains accurate written and electronic records, logs and work orders.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

16C.280



Attachment C

- Automotive maintenance nomenclature.
- Safe work practices.
- Proper use of lubricants and fuels.
- Standard vehicle servicing procedures.
- Types and use of cleaning products.
- Application and proper use of cleaning tools, equipment, and supplies.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Read, interpret and apply METRO policies, procedures and regulations.
- Understand and follow oral and written instructions.
- Use a variety of cleaning equipment, supplies, solvents, and other chemicals safely in the performance of work.
- Follow established safety practices.
- Operate vehicle service equipment.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

Two (2) years of progressively responsible experience servicing automotive, agricultural and/or construction equipment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Must be able to obtain a valid California Class B driver license is required.



Attachment C

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 regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



DATE: November 16, 2018
TO: Board of Directors
FROM: Angela Aitken, CFO and Acting Human Resources Director
**SUBJECT: CONSIDERATION AND APPROVAL OF THE FINAL CPS HR CONSULTING
MANAGEMENT TOTAL COMPENSATION STUDY RESULTS**

I. RECOMMENDED ACTION

That the Board approve the final CPS HR Consulting Management Total Compensation Study and its recommendations.

II. SUMMARY

- In March 2017, CPS HR Consulting (CPS) was awarded a base contract to conduct a Management Classification and Compensation Study.
- The study was broken down into two stages: a Job Analysis and a Total Compensation analysis.
- On January 16, 2018, the Santa Cruz Metropolitan Transit District (METRO) Personnel/HR Standing Committee (Committee) met and reviewed the Final CPS Management Classification Study results, which covered the revised management Job Descriptions and the initial ground rules for the Total Compensation methodology.
- At the January 16, 2018 meeting, Andi Bernard, Principal Consultant for CPS provided a presentation on the next steps process, which included a Total Compensation approach and the development of a comparables analysis at market median, 5% below market median, and 5% above market median.
- Initially, the Committee approved proceeding with ten (10) labor market comparables.
- On January 26, 2018, the Board approved the Committee's recommendation on the Classification Study results (Job Descriptions) and the Total Compensation methodology recommended by the Committee, which included the ten (10) labor market comparables.
- On May 1, 2018, CPS presented the Management Total Compensation Study to the Committee, which reflected the comparable agency salaries and benefits. Upon further review of the compensation details, the Committee, at the CEO's recommendation, approved revisions to the labor market comparables, eliminating the three large (non-peer) transit agencies.
- Further, the Committee agreed with the CEO's recommendation to proceed with analyzing the Managers' Total Compensation at market median. However, the Committee also requested data for 5% below and 5% above labor market median. The

Committee also requested that CPS try again to obtain labor market comparable data from two missing peer transit agencies.

- Staff and CPS had originally intended to return to the Committee in August 2018 with the final Total Compensation recommendations. However, following the Committee meeting, CPS, and staff discovered a number of errors in the information and data provided by CPS, which required CPS to return to the comparable agencies and obtain the information one more time. This process took several months.
- On October 12, 2018 Jennifer Ramos, Project Manager for CPS, presented an updated Management Total Compensation Study to the Committee.
- After review and discussion, the Committee recommended forwarding the full report to the Board for review and approval.
- Further, since CPS still needed to meet with the Managers to review the outcomes, the Committee authorized the CEO to make minor adjustments to the final recommendations based on the final review of the labor market comparables with the Managers.
- The Committee and the CEO recommend that the Board approve the final CPS Total Compensation recommendations at labor market median and authorize the CEO to implement the recommendations, effective July 1, 2018.
- Further, that the Board approve two (2) revised Job Descriptions attached (Assistant Operations Manager and Facilities Manager) and their recommended Total Compensation results. These revisions resulted from various changes in job duties and a reorganization that occurred after the start of the CPS study.
- The Committee also recommends that the full Board delegate to the CEO the determination of a six step range that may or may not incorporate an as-yet-to-be-defined Pay for Performance Program.

III. DISCUSSION/BACKGROUND

On March 24, 2017, CPS HR Consulting (CPS) was awarded a base contract to conduct a Management Classification and Total Compensation Study. The study was to be based on a total compensation approach and broken down into two stages: a Job Analysis phase and a Total Compensation analysis phase.

On January 16, 2018, the Santa Cruz Metropolitan Transit District (METRO) Personnel/HR Standing Committee (Committee) met and reviewed the Final CPS Management Classification Study results, which covered the revised Job Descriptions and the initial ground rules for the Total Compensation methodology. The Committee agreed to a recommendation from staff, whereby the Board of Directors would approve the CPS Final Management Classification Study, which contained the final recommended Job Descriptions, and a strategy to move forward with the Management Total Compensation

Study. The Committee also reserved its recommendation to set the compensation philosophy until after they had a chance to review the financial data at market median, 5% below market median, and 5% above market median.

On January 26, 2018, the Board approved the Committee's recommendation on the Classification Study results (Job Descriptions) and the total compensation methodology recommended by the Committee, which at that time included ten (10) labor market comparables.

On January 16, 2018, the Committee established the following labor market agencies for comparison:

- Alameda-Contra Costa Transit District (AC Transit) - non-peer
- Central Contra Costa County Transit Authority
- City of Santa Cruz
- County of Santa Cruz
- Golden Gate Transit District - non-peer
- Monterey-Salinas Transit District
- Riverside Transit Agency
- San Joaquin Regional Transit District
- Santa Barbara Metropolitan Transit District
- Santa Clara Valley Transportation Authority (VTA) - non-peer

The market analysis included collecting salary and benefits data on comparable positions from the labor market comparable agencies.

On May 1, 2018, CPS presented a Total Compensation Study to the Committee, which reflected the comparison agency salaries and benefits. Upon further review of the compensation details, the Committee, at the CEO's recommendation, approved revisions to the labor market comparables, eliminating the three large (non-peer) transit agencies. Further, the Committee agreed with the CEO's recommendation to proceed with analyzing the Manager's total compensation at market median. However, the Committee also requested data for 5% below and 5% above labor market median. The Committee also requested that CPS try again to obtain labor market comparable data from two missing transit agencies.

The Committee established the following new seven (7) labor market comparable agencies:

- Central Contra Costa County Transit Authority
- City of Santa Cruz

- County of Santa Cruz
- Monterey-Salinas Transit District
- Riverside Transit Agency
- San Joaquin Regional Transit District
- Santa Barbara Metropolitan Transit District

Staff had originally intended to return to the Committee and the Board in August 2018 with the final total compensation study recommendations. However, CPS and staff discovered a number of errors in the information provided, which required CPS to return to the comparable agencies and obtain the information one more time. This process took several months.

On October 12, 2018 Jennifer Ramos, Project Manager for CPS, provided an updated Management Total Compensation Study to the Committee. The Committee reviewed the information and recommended forwarding the full report to the Board for review and approval. Further, since CPS still needed to meet with the Managers to review the outcomes, the Committee recommended authorizing the CEO to make minor adjustments to the final recommendations based on the final review of the labor market comparables with the Managers.

IV. COMMITTEE ACTION

The Board Personnel/HR Standing Committee recommends:

- That the Board approve the final CPS Management Total Compensation Study recommendations at labor market median; and
- That the Board authorize the CEO to implement the recommendations, effective July 1, 2018; and
- That the Board approve two (2) revised Job Descriptions attached (Assistant Operations Manager and Facilities Manager) and their recommended Total Compensation results; and
- That the Board delegate to the CEO the determination of a six step range that may or may not incorporate an as-yet-to-be-defined Pay for Performance Program.

V. FINANCIAL CONSIDERATIONS/IMPACT

The financial impact of the CPS Management Total Compensation Study at the seven (7) agency labor market median total compensation methodology, when implemented and taking into account METRO's current staffing levels in FY19, will cost less than \$430K

annually, which was budgeted in FY19, and rising to \$444K annually, which was budgeted in FY20.

VI. ALTERNATIVES CONSIDERED

- The Board could decline to accept the results of the CPS Management Total Compensation Study.
 - Staff does not recommend this as neither a salary survey nor a Total Compensation Survey has ever been performed for the Management group.
- The Board could discuss alternative approaches to the CPS Management Total Compensation Study and delegate the matter back to the Committee for further review, analysis and the development of a recommendation back to the full Board.

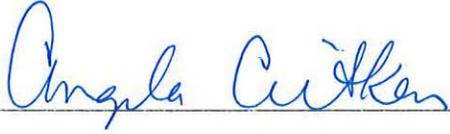
VII. ATTACHMENTS

- Attachment A:** CPS Final Management Total Compensation Study - November 2018
- Includes revised Operations Manager – Paratransit position description
- Attachment B:** Updated Facilities Maintenance Manager position description
- Attachment C:** Revised Job Description - Assistant Operations Manager (w/markups)
- Attachment D:** Revised Job Description - Assistant Operations Manager (w/o markups)
- Attachment E:** Management Pay Rate Tables as of June 14, 2018

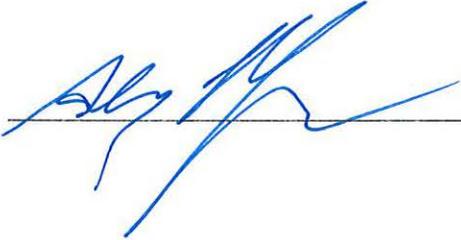
Prepared by: Angela Aitken, CFO and Acting HR Director

VI. APPROVALS:

Approved as to fiscal impact:
Angela Aitken, Finance Manager



Alex Clifford, CEO/General Manager



November 12, 2018

Private and Confidential

Santa Cruz Metropolitan Transit District

Final Management
Total Compensation Report

SUBMITTED BY:

Jennifer Ramos
Manager, Classification and
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Attachment A

*Santa Cruz Metropolitan Transit District
Management Total Compensation Report*

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Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report

I. Introduction

CPS HR Consulting (CPS HR) was retained by the Santa Cruz Metropolitan Transit District (SC METRO) to conduct a classification and total compensation study for eighteen (18) management classifications¹. This report contains the results of the total compensation study only. The results of the management classification study were submitted on December 15, 2017. Preliminary drafts of this compensation report were submitted to SC METRO in early months of 2018. In August 2018, SC METRO contacted CPS HR and asked for further validation of the data contained in draft versions of the management compensation study resulting in this final report.

The objective of the study was to determine the competitiveness of SC METRO's base salary and total compensation in the labor market. To achieve this, CPS HR utilized SC METRO's predetermined labor market of 10 comparable agencies (eight transit districts/authorities, one county, and one city) and collected and analyzed base salary and total compensation data.

At the request of the Personnel Committee at their scheduled meeting on May 1, 2018, and at SC METRO's formal request on June 4, 2018, the labor market was revised to remove three of the comparable agencies based on their size and geographic location. Thus, this report reflects the newly revised labor market of seven agencies. The summary of findings and datasheets submitted to SC METRO including data collected from all agencies as of July 1, 2018, is presented in [Appendix D](#).

Agency-wide averages and classification specific results are summarized in Section IV of this report. Survey results for each classification are presented in [Appendix A](#). In addition, other benefits and premium pay elements of interest to SC METRO were collected and are summarized in Section V and details presented in [Appendix B](#).

This Final Total Compensation Report contains the project scope and work plan, describes the methodologies utilized in data collection and analysis, and provides the total compensation results for all management classifications surveyed during this study. The data for this report was initially collected during the months of February through March 2018, and further vetted and validated during the months of August through November 2018. To account for the adjusted timeline, all salary and benefit data represented is as of July 1, 2018.

¹ Total number of study classifications increased to nineteen (19) on October 23, 2018 to include the classification of Facilities Manager.

II. Project Scope and Work Plan

To complete the total compensation study, CPS HR Project Team completed the following tasks:

- Project Manager, Jennifer Ramos, met with and clarified the scope of work with SC METRO's Chief Financial Officer and acting Human Resources Director, Angela Aiken, in August 2018. Ms. Aiken advised Ms. Ramos of the need to revisit the preliminary compensation study results from June 6, 2018.
- Reviewed SC METRO background materials including classification specifications, salary schedules, position control documents, organization charts, and internal alignment documentation.
- Reviewed the survey instrument (presented in [Appendix C](#)) developed and confirmed by SC METRO on February 23, 2018. In August 2018, SC METRO prompted re-examination of any results reflected in the original surveys and report produced in June 2018.
- Received confirmation from SC METRO regarding the 10 labor market agencies, classifications to be surveyed, and the survey instrument.
- CPS HR determined that the most expeditious way of obtaining data was to gather as much information as possible from online sources and then follow-up with the surveyed agency to validate data and complete missing information. Please see below for agencies who did not respond.
- Researched salary and benefits data from the respective labor market agencies, including salary schedules, classification specifications, benefits summaries, MOU's and position control documents where available. The Project Team followed through with agencies to request further information or clarification on job matching and/or benefits levels. Limited information was available for some agencies, and despite repeated contact, CPS HR was unable to obtain or confirm some data but will continue efforts to obtain the data.
- Prepared a draft report for client review and comment on October 1, 2018.
- Received client feedback, resolved questions, and finalized the draft compensation report.
- On October 5, 2018, CPS HR submitted the revised Management Total Compensation Report reflecting a total of six labor market agencies, the corresponding datasheets, and the benefits tables in [Appendix B](#). The report included data from only six of seven comparator agencies due to a lack of response and participation from one agency.

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report

- On October 11, 2018, CPS HR received a response to salary survey questions from the one pending comparator agency close to the end of the business day, and revised the reports corresponding datasheets to reflect data from all seven labor market agencies.
- On October 12, 2018, CPS HR submitted revised datasheets for the Management Total Compensation Report reflecting a total of seven labor market agencies, and the benefits tables in [Appendix B](#).
- On October 12, 2018, Project Manager, Jennifer Ramos, presented results of the compensation study at the Personnel Commission meeting along with Alex Clifford, Chief Executive Officer, and Angela Aiken, Chief Financial Officer.
- CPS HR met with SC METRO management staff in a series of in-person meetings and telephone calls from October to November 2018, primarily with managers who requested further clarification on job matches in the datasheets submitted on October 12, 2018.
- Prepared this Final Total Compensation Report on November 12, 2018, for client review and comment including Base Salary and Total Compensation datasheets for each classification ([Appendix A](#)) and Benefits Summary Tables ([Appendix B](#)) to arrive at total compensation market trends.

III. Compensation Study Parameters

The first step in conducting a total compensation survey is to determine the basic parameters for the survey. These parameters included:

- Confirmation of SC METRO's labor market position
- Labor market agencies (comparable agencies)
- Survey classifications (benchmark classifications)
- Survey scope

Labor Market Position

CPS HR provides a labor market data analysis based on the median of the market. The labor market median, which is described as the “middle” of the market, is the data point at which half of the complete range of data (excluding SC METRO's data) is higher, and half of the complete range of data (excluding SC METRO's data) is lower. The median is a common market position, particularly in smaller data sets, because the data is less likely to be skewed by high and low paying agencies in the market.

Labor Market Agencies

The agencies surveyed comprise SC METRO's seven (7)² labor market agencies for all nineteen (19) classifications surveyed; the final labor market agencies are listed below. The labor market agencies were selected by SC METRO. Factors of a balanced labor market involves the selection criteria outlined below.

Agency size – In general, agencies that employ relatively similar numbers of employees may have similar economic demographics. Since it is rare to find agencies that are exactly the same, the goal is to provide a balanced mix of larger and smaller agencies, thereby minimizing the “skewing” effect when either of these are used exclusively.

Geographic proximity – When considering a labor market, it is important to consider the geographic proximity of potential agencies, since they may be competitors in the recruitment market. If there are not enough agencies within the local market with which to conduct a study, then the geographic area may be expanded to include agencies in other closer counties.

Industry – In general, agencies that provide the same types of services are more likely to have similar types of job classes, and are more likely to be recruiting from the same applicant pool.

² See discussion on reduction of labor market agencies in Introduction and following section.

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report

Competing agencies – Information regarding the agencies that the SC METRO frequently competes with for talent (i.e. has lost employees to or recruited employees from) is also useful in selecting the labor market agencies.

SC METRO provided the predetermined labor market to CPS HR. The original labor market agencies included:

1. Alameda-Contra Costa Transit District
2. Central Contra Costa County Transit Authority
3. City of Santa Cruz
4. County of Santa Cruz
5. Golden Gate Transit District
6. Monterey-Salinas Transit District
7. Riverside Transit Agency
8. San Joaquin Regional Transit District
9. Santa Barbara Metropolitan Transit District
10. Santa Clara Valley Transportation Authority

CPS HR agreed to reducing the labor market and adjusting results at the request of SC METRO. The final labor market agencies are included below. CPS HR had collected data from the three agencies removed.

1. Central Contra Costa County Transit Authority
2. City of Santa Cruz
3. County of Santa Cruz
4. Monterey-Salinas Transit District
5. Riverside Transit Agency
6. San Joaquin Regional Transit District
7. Santa Barbara Metropolitan Transit District

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report

Table 1 presents the cost of living in the City of Santa Cruz in comparison to the cities of the other labor market agencies, as well as a summary of the United States average cost of living as a point of reference. Cost of living measures the amount of money needed to sustain a certain level of living, including basic expenses such as the cost of housing, food, and taxes in an area. Cost of living is often used to compare how expensive it is to live in one city versus another locale. CPS HR obtains this information from the Economic Research Institute (ERI)³.

The cost of living for the labor market cities is presented below with noticeable variances when comparing SC METRO to other labor market agency locations. As an example, the comparator agencies have a range from -34.0% to +1.5% cost of living in relation to Santa Cruz, California. However, it is important to note that CPS HR relies on cost of wages data for salary considerations over cost of living. Cost of wages data *reflects the cost to employer* for work performed in an organization by location despite where the employees live. SC METRO is located in Santa Cruz, California, however, some employees may not live in the same location.

Table 1: Labor Market Agencies – Cost of Living

Comparison Agency	ERI City	Base City Income Levels					
		\$20,000	\$40,000	\$60,000	\$80,000	\$100,000	Average
SC METRO	Santa Cruz	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
City of Santa Cruz	Santa Cruz	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
County of Santa Cruz	Santa Cruz	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Central Contra Costa County Transit Authority	Walnut Creek	100.5%	101.3%	101.6%	101.9%	102.1%	101.5%
Monterey-Salinas Transit District	Monterey	88.2%	90.7%	91.5%	91.9%	92.4%	90.9%
Riverside Transit Agency	Riverside	63.3%	71.1%	73.5%	75.1%	76.7%	71.9%
San Joaquin Regional Transit District	Stockton	54.7%	64.8%	68.0%	70.1%	72.2%	66.0%
Santa Barbara Metropolitan Transit District	Santa Barbara	91.0%	92.5%	92.9%	93.2%	93.5%	92.6%
United States Average	Nation-wide	42.2%	54.7%	58.5%	60.4%	62.0%	55.6%

³ The Economic Research Institute (ERI) database compiles salary, cost-of-living, and compensation survey data available with current market data for more than 1,000 industry sectors. Additional information for the database is available upon request.

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Table 2 presents the cost of wages paid in the City of Santa Cruz in comparison to the cities of the other labor market agencies, as well as a summary of the United States average cost of wages as a point of reference. Cost of wages measures the cost of labor or the sum of all wages paid to employees, as well as the cost of employee benefits and payroll taxes, paid by an employer. Cost of wages often factors in direct and indirect (overhead) costs associated with wages paid by the employer.

The cost of wages for the labor market cities selected are presented below. CPS HR methodology focuses on cost of wages data, since it reflects the cost to employer for work performed in an organization. Therefore, cost of wages data is more reliable for salary considerations over cost of living. As an example, the comparator agencies range in cost of wages from -3.1% to +7.2% higher when compared to Santa Cruz, California. There is more consistency across comparator agencies for cost of wages in comparison to cost of living variances. Therefore, CPS HR did not reflect this element in the total compensation datasheets representing labor market trends.

Table 2: Labor Market Agencies – Cost of Wages

Comparison Agency	ERI City	Base City Income Levels						
		\$24,000	\$36,000	\$48,000	\$72,000	\$108,000	\$144,000	Average
SC METRO	Santa Cruz	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
City of Santa Cruz	Santa Cruz	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
County of Santa Cruz	Santa Cruz	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Central Contra Costa County Transit Authority	Walnut Creek	102.0%	107.1%	108.1%	109.2%	109.0%	108.0%	107.2%
Monterey-Salinas Transit District	Monterey	99.6%	100.1%	101.0%	102.3%	103.0%	103.2%	101.5%
Riverside Transit Agency	Riverside	98.2%	95.2%	95.7%	96.6%	97.5%	98.0%	96.9%
San Joaquin Regional Transit District	Stockton	98.6%	96.2%	96.4%	96.6%	96.6%	97.0%	96.9%
Santa Barbara Metropolitan Transit District	Santa Barbara	99.4%	98.5%	98.9%	99.7%	100.5%	100.6%	99.6%
United States Average	Nation-wide	74.5%	90.10%	89.80%	89.70%	89.70%	90.40%	87.37%

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Survey Classifications

The survey benchmark classifications for the study are presented below. Summary descriptions for all survey benchmark classifications are included in the survey instrument displayed in [Appendix C](#).

1. Assistant Maintenance Manager
2. Assistant Operations Manager (Paratransit Department)
3. Chief Financial Officer (CFO)
4. Chief Operating Officer (COO)
5. Database Administrator
6. Executive Assistant
7. Facilities Manager⁴
8. Finance Deputy Director
9. Human Resources Deputy Director
10. Human Resources Director
11. Information Technology and Intelligent Trans Systems Director
12. Maintenance Manager
13. Marketing, Communications and Customer Service Director
14. Operations Manager - Paratransit Division
15. Operations Manager - Fixed Route Division
16. Planning and Development Director
17. Purchasing and Special Projects Director
18. Safety, Security and Risk Management Director
19. Senior Database Administrator

Survey Data Collection Scope

Comparable Classifications – Classification Matching

When conducting a salary survey, the intent is to provide general market trends by comparing the span of control, duties and responsibilities, and knowledge, skill and ability requirements to determine whether these are comparable enough to utilize as a match. With a balanced labor market and the use of whole job analysis, it is reasonable to assume that while some matches will have slightly higher responsibilities and some matches will have slightly lower responsibilities, the overall scope of duties and responsibilities of the combined matches will be balanced.

In the process of matching comparable classifications from other agencies, CPS HR does not only rely on classification specifications. CPS HR references position control documents, where available, to specifically identify which classification, and level of classification, perform the duties of the SC METRO's classification. This is particularly relevant to an agency's organizational hierarchy where there are multi-levels of management within a classification plan that are matched from the other agencies. This level of analysis is important because classification specifications may describe a certain level of work, for example, as the journey level, when the use of the classification series demonstrates that the majority of duties are assigned to a higher level, which may be described in the classification specification as an

⁴ Facilities Manager was added to the study in October 2018 at the request of SC METRO. The class is part of SC METRO's existing classification and compensation plan; however, was a vacant position at the time of the management classification study in 2017.

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advanced level in the classification series. In addition, block budgeting or other fiscal tools facilitating series progression through multiple levels, may provide greater flexibility in the use of the classification structure than is evident in the content of the classification specification. To the extent possible, CPS HR identifies the operational use of a classification in determining whether it is a comparable job match.

Comparable Classifications – Required Number of Comparable Classifications

CPS HR's best practice is that benchmark classifications must have a minimum of three (3) classification matches to be analyzed. In most studies, it is common to have some classes for which limited market data exists.

There are many reasons a benchmark class may not have enough comparable data including:

- Differences in the delivery of services
- Differences in span of control
- Differences in organizational structure
- Differences in operational size
- The classification is not commonly found in other agencies
- Agency does not provide that service

Internal Equity Considerations – Insufficient Number of Comparable Classifications

Because a compensation plan is developed through the analysis of external market data and internal relationships, the absence of sufficient labor market data for a particular classification does not mean that no salary recommendation can be developed, since many salary recommendations are ultimately based upon internal equity with other classes.

Labor Market Benefits Collected

CPS HR collected numerous benefits and compensation practices, in addition to base salary, to complete the total compensation evaluation of the SC METRO in the labor market. When measuring the market, the goal is to identify an agency's competitive position in the labor market to attract and retain talent, in addition to promoting internal equity. This is done by measuring those benefits that new employees would currently receive upon their date of hire. In addition, reported benefits and premium pay are those which all employees in the group would qualify for, versus premium pay provided to a limited group of employees, such as shift differentials, or assignment pay.

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The benefits data collected for the study is presented in Table 3 below.

Table 3: Total Compensation Benefit Data Collected

Benefit or Pay Practice	Description
<p>Comparable Classification Title</p>	<p>CPS HR matched SC METRO’s benchmark classifications to those in the labor market agencies.</p> <p>The methods used by CPS HR for matching classifications is discussed in the previous section.</p> <p>The term “No Comparable Classification” is used when CPS HR did not find a comparable classification within an agency to a specific benchmark classification. No compensation data will be presented for the benchmark classification for that agency. The term “Data Not Available” is used when CPS HR did find a comparable classification, but it is either unfunded or no salary could be obtained.</p>
<p>Minimum and Maximum Base Salary</p>	<p>The minimum and maximum <i>monthly</i> base salary. Where salary range was not available.</p>
<p>Allowance Pay Practices <i>Table B-4</i></p>	<p>These amounts reflect general policies on vehicle, phone, or other allowances. The amounts may not be universally applicable to all positions within a unit or may be a discretionary policy.</p>
<p>Cost of Living Adjustment (COLA) <i>Table B-1</i></p>	<p>COLAs are reported in the future, when not available last known COLA is reported. Certain unrepresented employee groups may not have documentation of past or future COLAs and Unknown is indicated.</p>
<p>Deferred Compensation Contribution <i>Table B-3</i></p>	<p>If applicable the amount(s) the agency contributes into a deferred compensation plan. CPS HR calculates non-matching employer contributions only, as matching funds are “elective.”</p>
<p>Education/Tuition Reimbursement <i>Table B-3</i></p>	<p>The amounts of reimbursement for tuition, books and/or fees for courses to encourage and support educational programs which provide employees the opportunity for personal career development.</p>
<p>Employer Retirement Contribution <i>Table B-2</i></p>	<p>Employer’s normal cost contribution rate to mandated retirement plans, CalPERS, 37 Act or other retirement plans.</p>
<p>Full Time Equivalent (FTE) <i>Table B-1</i></p>	<p>FTEs or allocated positions are reported by agency. If comparable classifications were matched based on executive classifications of the overall agency and law enforcement department, specific classifications FTE/positions for both were reported.</p>
<p>Health Plan Benefits & Contributions <i>Tables B-5 & B-6</i></p>	<p>Medical Insurance plan – For standards purposes, the family rate for the <i>most expensive</i> plan is measured in the market. In some agencies, a flat employer contribution rate is utilized, regardless of the plan selected by employees.</p>

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Benefit or Pay Practice	Description
	<p>Dental Insurance plan – For standards purposes, the family rate for the <i>most expensive</i> plan is measured in the market. If no amount is entered in the datasheets, the cost may be included in the medical plan costs or the agency does not offer or contribute towards a dental benefit (the benefits summary tables will provide more detail on this).</p> <p>Vision Insurance plan – For standards purposes, the family rate for the <i>most expensive</i> plan is measured in the market. If no amount is entered in the datasheets, the cost may be included in the medical plan costs or the agency does not offer or contribute to a vision benefit (the benefits summary tables will provide more detail on this).</p> <p>Life Insurance – Whether the employer provides a Life Insurance policy, and if so, whether it is paid for by the employer or employee.</p> <p>Long-Term Disability – Whether the employer provides a Long-Term Disability policy, and if so, whether it is paid for by the employer or employee.</p> <p>Optional Benefits – Benefits that employees voluntarily elect to enroll in.</p>
<p>Leave Practices Tables B-8- B-10</p>	<p>For standards purposes, vacation/annual leave practices reflect leave accrual rates and maximums at one, five, 10, 15 and 20 years; sick leave accrual rates and maximums; administrative/management and bereavement leaves; holiday; and other leaves.</p>
<p>Longevity Pay Practice Table B-3</p>	<p>The amount(s) the agency pays for years of service with the agency. For this analysis, CPS HR has used the 10-year level for eligible employees, as this is a more common achievement. Longevity pay at the 10-year mark was calculated into total compensation only if it was an increase to base pay, not a one-time payout.</p>
<p>Retiree Health Insurance Practices Table B-7</p>	<p>Practices related to retiree health insurance provided to eligible retirees.</p>
<p>Social Security (Medicare and FICA) Contributions Table B-2</p>	<p>These amounts reflect the cost of the employer’s contributions to Medicare (1.45%) and FICA (6.20% to maximum of \$128,700 for FY 2018), if the agency participates. These contributions are utilized in the total compensation calculations.</p>

IV. Survey Results

SC METRO should be aware that all data represented is as of July 1, 2018, and this report does not account for any adjustments since that time.

Compensation Results

SC METRO's overall position within the labor market, and the averages for each classification, are presented in this section. Appendix A and B provide detailed results as described below.

- [Appendix A](#) presents all study classifications with total compensation results. Classifications are presented in alphabetical order.
Note: The designation of "No Comparable Classifications" is used if an agency reported no comparable classification, or if a review of the duties and responsibilities assigned to the classification indicated that it was not comparable, or if the duties were significantly split among more than a single classification. The designation of "Data Not Available" indicates a match was identified but salary could not be obtained.
- [Appendix B](#) presents the collected benefit information for all employee groups.
Note: The designation of "Not Applicable" (N/A) is used if an agency does not provide a benefit; the designation of "Data Not Available" (DNA) is used if an agency did not provide the needed information.

Labor Market Agency Participation

The majority of the labor market agencies did not have data readily available on their official agency webpage. CPS HR consultants worked directly with agency contacts to collect and/or confirm data represented in this report.

Benchmark Classifications with Insufficient Comparable Classifications

One of the eighteen (18) classifications, the Assistant Operations Manager (Paratransit Department), returned only two comparable classifications. As noted previously in report, one classification was added later in October 2018 to reach a total of nineteen (19) classifications in this study.

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Labor Market Position by Classification

This section provides a summary of the SC METRO's position within the labor market by classification. All classifications met the minimum criteria of three (3) comparable classifications.

Table 4 provides the following information for base salary and Table 5 provides information for total compensation for each classification. The tables identify the SC METRO's survey classification and number of comparable classifications identified within the analysis. The following data and calculations are presented for both base salary and total compensation.

- Classification Title: SC METRO's classification title
- Number of Matches: The number of comparable matches found
- Agency Maximum: SC METRO's maximum monthly salary for the survey classification
- Market Median: The labor market median monthly maximum salary which is calculated using the maximum monthly salary for each of the comparable classes; that range of data is then computed to provide the median or mean amount.
- Percentage Agency's Above/Below Market: The percentage SC METRO's maximum monthly salary is above or below the median of the labor market; this number indicates what percentage of SC METRO's salary is required to move it up or down to the market median.
- Percentile of Agency in Labor Market: SC METRO requested that 5% below and 5% above the median be presented; therefore, the 45th and 55th percentiles have been reported for SC METRO's compensation considerations. The 45th and 55th percentiles represent 5% below and 5% above SC METRO's established labor market median.

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**Table 4: SC METRO Percent (%) Above/Below Agency Labor Market Median by Classification
Monthly Base Salary, Select Agencies**

Classification	# Matches	SC METRO Maximum (Monthly)	Market Median (Monthly)	% SC METRO Above/Below Market	Percentile of SC METRO in Labor Market			
					45 th \$	45 th %	55 th \$	55 th %
Assistant Maintenance Manager	4	\$8,694	\$10,269	-18.11%	\$10,212	-17.46%	\$10,325	-18.76%
Chief Financial Officer (CFO)	7	\$11,558	\$16,031	-38.70%	\$15,490	-34.02%	\$16,198	-40.14%
Chief Operating Officer (COO)	5	\$12,716	\$16,587	-30.44%	\$16,115	-26.73%	\$16,594	-30.50%
Database Administrator	3	\$8,039	\$9,598	-19.39%	\$9,395	-16.86%	\$9,679	-20.40%
Executive Assistant	6	\$6,810	\$7,354	-7.98%	\$7,190	-5.58%	\$7,517	-10.39%
Facilities Manager ⁵	4		\$9,957		\$9,806		\$10,107	
Finance Deputy Director	5	\$10,055	\$12,017	-19.51%	\$12,008	-19.42%	\$12,119	-20.53%
Human Resources Deputy Director	5	\$8,694	\$10,850	-24.80%	\$10,571	-21.59%	\$11,548	-32.83%
Human Resources Director	7	\$11,558	\$15,153	-31.10%	\$14,554	-25.92%	\$15,348	-32.79%
Information Technology and Intelligent Transportation Systems Director	7	\$10,409	\$15,153	-45.58%	\$14,996	-44.07%	\$15,357	-47.54%
Maintenance Manager	6	\$11,558	\$12,305	-6.46%	\$11,099	3.97%	\$13,510	-16.89%
Marketing, Communications and Customer Service Director	4	\$10,409	\$10,737	-3.15%	\$10,352	0.54%	\$11,121	-6.84%
Operations Manager- Paratransit Division	4	\$8,694	\$10,153	-16.78%	\$9,944	-14.38%	\$10,362	-19.19%
Operations Manager-Fixed Route Division	5	\$8,694	\$10,850	-24.80%	\$10,571	-21.59%	\$11,313	-30.12%
Planning and Development Director	7	\$11,558	\$13,156	-13.83%	\$12,876	-11.41%	\$13,950	-20.70%
Purchasing and Special Projects Director	6	\$10,409	\$10,786	-3.62%	\$10,171	2.29%	\$11,402	-9.54%
Safety Security and Risk Management Director	7	\$8,039	\$11,116	-38.28%	\$10,618	-32.08%	\$11,386	-41.64%
Senior Database Administrator	5	\$10,234	\$10,672	-4.28%	\$10,204	0.29%	\$10,932	-6.82%
				Averages	-20.40%		-16.71%	-23.86%

⁵ Facilities Manager does not have a current salary to reference.

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**Table 5: SC METRO Percent (%) Above/Below Agency Labor Market Median by Classification
Monthly Total Compensation, Select Agencies**

Classification	# Matches	SC METRO Maximum (Monthly)	Market Median (Monthly)	% SC METRO Above/Below Market	Percentile of SC METRO in Labor Market			
					45 th \$	45 th %	55 th \$	55 th %
Assistant Maintenance Manager	4	\$12,540	\$13,204	-5.30%	\$12,941	-3.20%	\$13,467	-7.40%
Chief Financial Officer (CFO)	7	\$15,852	\$19,471	-22.83%	\$19,156	-20.84%	\$19,656	-23.99%
Chief Operating Officer (COO)	5	\$17,191	\$19,471	-13.26%	\$19,261	-12.04%	\$19,594	-13.98%
Database Administrator	3	\$11,782	\$13,609	-15.51%	\$13,334	-13.17%	\$13,651	-15.87%
Executive Assistant	6	\$10,361	\$10,352	0.08%	\$10,258	0.98%	\$10,446	-0.83%
Facilities Manager ⁶	4		\$13,581		\$13,431		\$13,731	
Finance Deputy Director	5	\$14,114	\$15,012	-6.36%	\$14,993	-6.23%	\$15,272	-8.21%
Human Resources Deputy Director	5	\$12,540	\$13,172	-5.04%	\$13,154	-4.90%	\$14,205	-13.28%
Human Resources Director	7	\$15,852	\$18,351	-15.77%	\$18,015	-13.64%	\$18,429	-16.26%
Information Technology and Intelligent Transportation Systems Director	7	\$14,523	\$18,351	-26.36%	\$18,042	-24.23%	\$18,910	-30.21%
Maintenance Manager	6	\$15,852	\$16,156	-1.92%	\$15,058	5.01%	\$17,253	-8.84%
Marketing, Communications and Customer Service Director	4	\$14,523	\$13,998	3.61%	\$13,723	5.51%	\$14,273	1.72%
Operations Manager- Paratransit Division	4	\$12,540	\$13,126	-4.68%	\$13,113	-4.57%	\$13,140	-4.79%
Operations Manager-Fixed Route Division	5	\$12,540	\$13,172	-5.04%	\$13,154	-4.90%	\$13,821	-10.22%
Planning and Development Director	7	\$15,852	\$17,231	-8.70%	\$16,676	-5.20%	\$17,645	-11.31%
Purchasing and Special Projects Director	6	\$14,523	\$14,237	1.97%	\$13,897	4.31%	\$14,576	-0.36%
Safety Security and Risk Management Director	7	\$11,782	\$14,915	-26.59%	\$14,365	-21.92%	\$15,044	-27.68%
Senior Database Administrator	5	\$14,321	\$14,841	-3.64%	\$14,225	0.67%	\$14,856	-3.74%
				Averages				
					-9.14%		-6.96%	-11.48%

⁶ Facilities Manager does not have a current salary to reference.

Attachment A

Labor Market Position Agency Wide

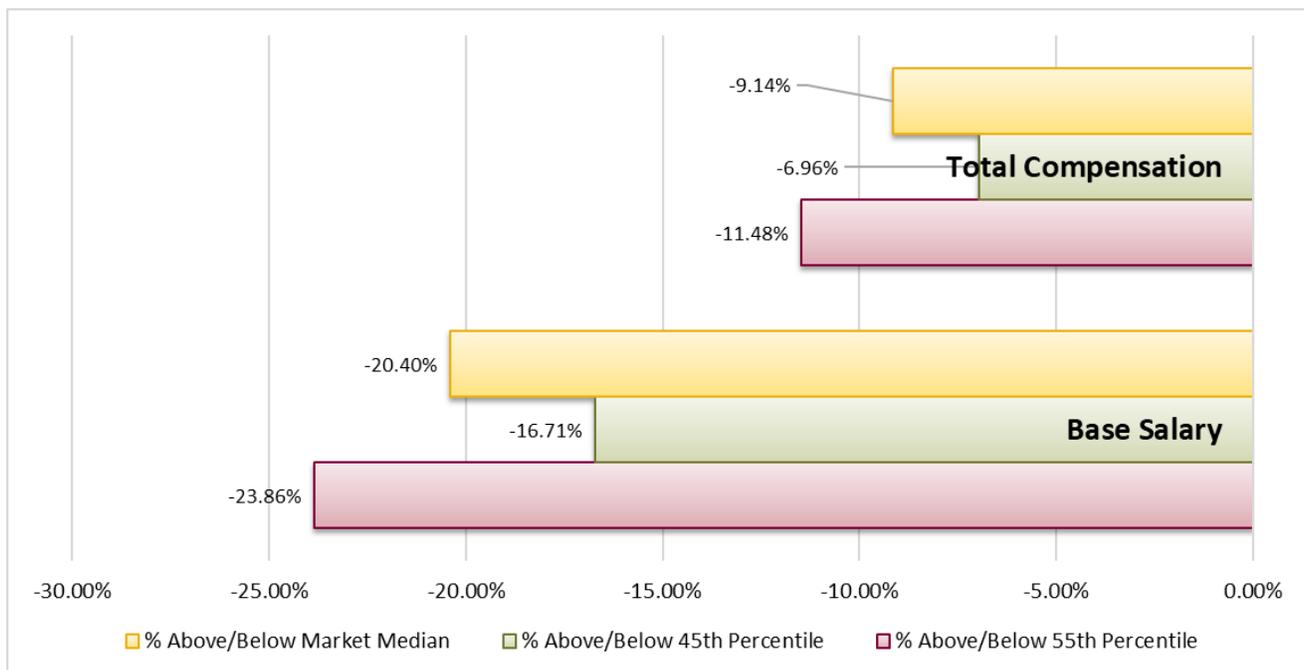
The data included in this report reflects that SC METRO is below the labor market median average when comparing base salary and total compensation medians. When looking at the median, SC METRO is lagging behind the market by -20.40% for base salary and -9.14% for total compensation. The market median tends to be a more stable representation of trends in the market, since it eliminates high and low payers which can skew data and outcomes. For this reason, CPS HR's methodology is to use the market median for compensation considerations.

Table 6 and Figure 1 present SC METRO's position within the labor market.

Table 6: SC METRO Position in the Labor Market, Select Agencies

	Market Median	Market 45th Percentile	Market 55th Percentile
Base Salary	-20.40%	-16.71%	-23.86%
Total Compensation	-9.14%	-6.96%	-11.48%

Figure 1: SC METRO Percent Position in the Labor Market



V. Benefits Summary Tables

In addition to the base salary and total compensation data presented in the datasheets provided within [Appendix A](#), CPS HR presents additional benefit information for all surveyed classifications displayed in table format in [Appendix B](#).

VI. Re-examination of Management Classes

At the request of SC MTERO, CPS HR reviewed several management classifications that may have acquired additional duties since the management classification study in 2017, to assure that any compensation study results and decisions made from the data reflected in this report are accurate and current.

1. Review of Operations Manager-Paratransit Division

At the request of Santa Cruz Metro, CPS HR re-evaluated the class of Operations Manager-Paratransit Division (Operations Manager) to determine whether recent changes in the incumbent's duties has significantly impacted/alterd the class description and/or the compensation survey data. Specifically, the incumbent, Daniel Zaragoza, is performing duties as the Operations Manager and is also performing duties previously performed by the Assistant Operations Manager – Paratransit Division (Assistant Operations Manager). Consequently, METRO plans to eliminate the latter positions. Mr. Zaragoza questioned whether these additional duties needed to be incorporated into the class specification prepared by CPH HR for Operations Manager – Paratransit Division and whether they required a re-evaluation of the compensation data provided by CPS HR as well. In order to ensure that CPS HR has current information regarding the full scope of work currently being performed, Mr. Zaragoza submitted a new Position Description Questionnaire (PDQ) in October 2018.

Based on the current class definition, the Assistant Operations Manager assists the Operations Manager with all division activities specifically focusing on the day-to-day operational activities allowing the Operations Manager to focus on strategic planning and policy matters and to interact more with external agencies. The Assistant Operations Manager spends a large percentage of time directly supervising subordinate employees and dealing with personnel-related issues. The new PDQ form submitted by Mr. Zaragoza confirms that he is performing such duties as well as the duties of the Operations Manager.

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The Operations Manager class specification proposed by CPS HR includes supervisory duty statements. However, since supervision is not the preponderant role of the position, such duties were minimally described. Given that Mr. Zaragoza does spend a larger amount of time on such duties, it is reasonable to expand the supervisory duty statements accordingly. Thus, CPS HR has made slight revisions to the class specification so that the duties of the Assistant Operations Manager are visibly incorporated.

However, the proposed changes have no impact on the compensation data that CPS HR has already provided for the Operations Manager class. Positions are classified based on the highest-level preponderant duties being performed and Mr. Zaragoza's PDQ states that he is still serving as the Operations Manager which is a higher-level function than Assistant Operations Manager. Therefore, the compensation data for this position, which is based on the market matches for Operations Manager, is still appropriate. Furthermore, it is important to note that, by absorbing the duties of the Assistant Operations Manager, the overall complexity of the work, span of supervisory control, level of responsibility, decision making, authority, and related factors applicable to the position have not changed. If the volume of work being performed by Mr. Zaragoza is excessive (because he is performing two jobs instead of one), that is not a classification issue but instead is an issue which management needs to address through staffing changes.

Furthermore, when a higher-level position absorbs the duties of a lower-level position, and if the lower-level duties are so substantial that they become preponderant (thus limiting the incumbent's performance of the higher-level work), the most appropriate recommendation is to reclassify the position downward to the lower level class. CPS HR is not recommending that here as there is insufficient evidence suggesting that Mr. Zaragoza is preponderantly performing Assistant Operations Manager duties.

In summary, CPS HR has made minor changes to the class specification for Operations Manager – Paratransit Division. However, there is no basis for changing the compensation data previously provided for that class. The classification specification is provided in [Appendix D](#).

2. Review of Purchasing and Materials Director

At the request of Santa Cruz Metro, CPS HR re-evaluated the class of Purchasing and Materials Director to determine whether additional information submitted by the incumbent (Erron Alvey) significantly impacts/alters the class description and/or the compensation survey data. Specifically, Ms. Alvey was concerned that her duties related to project management had not been sufficiently incorporated into the class specification and therefore not given sufficient consideration during the compensation survey.

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The CPS HR consultant noted that the PDQ submitted by Ms. Alvey in June of 2017 indicated that approximately 73% of her time was devoted to purchasing-related activities, suggesting that purchasing management was the preponderant role of the position. The PDQ further stated that approximately 10% of her time was spent on “special projects”, and the PDQ did not provide details about what that entailed.

In October of 2018, Ms. Alvey provided additional information to CPS HR describing her project-related duties in greater detail. She provided two examples of current projects she is managing: 1) transition of METRO’s fleet to electric, and 2) construction of a new operations facility. For both of these projects, Ms. Alvey identified several project elements for which she has been responsible, and she indicated that she has “complete project oversight” of the new operations facility project. However, the tasks and responsibilities listed appear to focus on the purchasing aspects of such projects, which would be appropriate for the individual overseeing agency-wide procurement. Furthermore, there is still no indication that such project work occupies more than 10% of Ms. Alvey’s time.

The class specification for Purchasing and Special Projects Director, which has been prepared by CPS HR, contains two duty statements as follows:

- Serves as project coordinator and/or manager on special projects that involve personnel from multiple departments within the Agency, as well as outside consultants and contractors.
- Creates, maintains, and executes a comprehensive Project Management Plan for each special project, relative to size and scope, including, but not limited to overall project objectives, schedule, roles and responsibilities, budget control, document control, and closeout procedures.

These duty statements appear to appropriately describe the type of project management/coordination performed by Ms. Alvey and CPS HR does not recommend making any changes to the proposed class specification. Nevertheless, in an effort to respond to Ms. Alvey’s concerns, the CPS HR consultant re-evaluated the data collected during the compensation survey to determine whether Ms. Alvey’s project management duties were given sufficient consideration. This re-evaluation determined the following:

- Nothing in Ms. Alvey’s supplemental information suggests that project management duties have become preponderant to her position;
- Some of the market matches are slightly “higher” than Ms. Alvey’s position in terms of the level of duties and responsibilities, and some are slightly lower; however, together they are a balanced representation of managers responsible for agency-wide procurement;

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- None of the agencies have a manager-level class responsible solely for the type of project management being performed by Ms. Alvey; however, CPS HR identified several management and non-management classes that included some project management duties, suggesting that such work is not appropriate only for a department-head position;
- Overall, project management is not a higher-level (or higher-compensated) responsibility than managing agency-wide procurement; thus, CPS HR found no market-based justification for altering our original compensation data for this position.

In summary, CPS HR found no basis for altering the class specification for Purchasing and Materials Director and no reason to change the compensation data previously provided.

VII. Next Steps

This management compensation report provides detailed information concerning the scope of the project, the methodology used to complete the total compensation study, as well as the results of the study with all requested additional adjustments.

The next steps include presenting the results of this compensation study to key stakeholders, including the personnel commission and board, as well as discussing implementation with senior management.

Should you require any further information or have questions and comments with respect to this final report, please do not hesitate to contact Jennifer Ramos at 916-471-3125 or via email at jramos@cpshr.us.

Attachment A

*Santa Cruz Metropolitan Transit District
Management Total Compensation Report*

Appendix A-1: Datasheets, Select Agencies

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Assistant Maintenance Manager

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Assistant Maintenance Manager	\$6,814	\$8,694	\$435			\$2,311	\$147	\$26	\$801	\$126	\$12,540
Central Contra Costa County Transit Authority	Facilities Superintendent	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	Building Maintenance Superintendent	\$7,833	\$10,457			\$2,004				\$856	\$764	\$14,081
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Maintenance Manager	\$6,503	\$10,080		\$25		\$1,217	\$18		\$840	\$146	\$12,327
San Joaquin Regional Transit District	No Comparable Class											
Santa Barbara Metropolitan Transit District	Assistant Superintendent of Maintenance	\$8,333	\$8,333		\$833	\$2,200					\$637	\$12,004

Base Salary Median	\$10,269
Percentage Above or Below Median	-18.11%
Base Salary 45th Percentile	\$10,212
Base Salary 55th Percentile	\$10,325
Percentage Above or Below 45th Percentile	-17.46%
Percentage Above or Below 55th Percentile	-18.76%
Total Matches:	4

Total Compensation Median	\$13,204
Percentage Above or Below Median	-5.30%
Total Compensation 45th Percentile	\$12,941
Total Compensation 55th Percentile	\$13,467
Percentage Above or Below 45th Percentile	-3.20%
Percentage Above or Below 55th Percentile	-7.40%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Assistant Operations Manager (Para Transit Department)

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Assistant Operations Manager (Para Transit Department)	\$5,692	\$7,266	\$363			\$2,311	\$147	\$26	\$669	\$105	\$10,888
Central Contra Costa County Transit Authority	No Comparable Class											
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	No Comparable Class											
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Assistant Contract Operations Manager	\$5,676	\$8,064		\$25		\$1,217	\$18		\$672	\$117	\$10,113
San Joaquin Regional Transit District	No Comparable Class											
Santa Barbara Metropolitan Transit District	Superintendent of Operations	\$7,370	\$7,370		\$737	\$2,200					\$564	\$10,871

Base Salary Median	\$7,717
Percentage Above or Below Median	-6.21%

Base Salary 45th Percentile	\$7,682
Base Salary 55th Percentile	\$7,752
Percentage Above or Below 45th Percentile	-5.73%
Percentage Above or Below 55th Percentile	-6.68%

Total Matches:	2
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Total Compensation Median	\$10,492
Percentage Above or Below Median	3.64%

Total Compensation 45th Percentile	\$10,454
Total Compensation 55th Percentile	\$10,530
Percentage Above or Below 45th Percentile	3.98%
Percentage Above or Below 55th Percentile	3.29%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Chief Financial Officer (CFO)

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Chief Financial Officer (CFO)	\$9,053	\$11,558	\$578			\$2,311	\$147	\$26	\$1,065	\$168	\$15,852
Central Contra Costa County Transit Authority	Chief Financial Officer	\$12,446	\$16,738				\$1,678	\$43	\$28	\$1,358	\$243	\$20,088
City of Santa Cruz	Director of Finance	\$12,564	\$16,031	\$401			\$1,980	\$127	\$19	\$1,471	\$845	\$20,874
County of Santa Cruz	Auditor-Controller-Treasurer	\$19,196	\$19,196			\$2,004				\$1,572	\$891	\$23,662
Monterey Salinas Transit District	Chief Financial Officer	\$9,554	\$13,830				\$1,937			\$1,181	\$201	\$17,149
Riverside Transit Agency	Chief Financial Officer	\$10,053	\$16,587		\$25		\$1,217	\$18		\$1,383	\$241	\$19,471
San Joaquin Regional Transit District	Chief Financial Officer	\$9,677	\$14,226		\$1,423		\$1,825	\$107	\$24		\$819	\$18,423
Santa Barbara Metropolitan Transit District	Comptroller-Procurement Officer	\$10,612	\$10,612		\$1,061	\$2,200					\$766	\$14,639

Base Salary Median	\$16,031
Percentage Above or Below Median	-38.70%

Base Salary 45th Percentile	\$15,490
Base Salary 55th Percentile	\$16,198
Percentage Above or Below 45th Percentile	-34.02%
Percentage Above or Below 55th Percentile	-40.14%

Total Matches:	7
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Total Compensation Median	\$19,471
Percentage Above or Below Median	-22.83%

Total Compensation 45th Percentile	\$19,156
Total Compensation 55th Percentile	\$19,656
Percentage Above or Below 45th Percentile	-20.84%
Percentage Above or Below 55th Percentile	-23.99%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Chief Operating Officer (COO)

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Chief Operating Officer (COO)	\$9,960	\$12,716	\$636			\$2,311	\$147	\$26	\$1,171	\$184	\$17,191
Central Contra Costa County Transit Authority	Chief Operating Officer	\$12,446	\$16,738				\$1,678	\$43	\$28	\$1,358	\$243	\$20,088
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	Director of General Services	\$12,405	\$16,622			\$2,004				\$1,361	\$853	\$20,840
Monterey Salinas Transit District	Chief Operating Officer	\$9,093	\$13,164				\$1,937			\$1,124	\$191	\$16,416
Riverside Transit Agency	Chief Operating Officer	\$10,053	\$16,587		\$25		\$1,217	\$18		\$1,383	\$241	\$19,471
San Joaquin Regional Transit District	Chief Operating Officer	\$9,677	\$14,226		\$1,423		\$1,825	\$107	\$24		\$819	\$18,423
Santa Barbara Metropolitan Transit District	Data Not Available											

Base Salary Median	\$16,587
Percentage Above or Below Median	-30.44%

Base Salary 45th Percentile	\$16,115
Base Salary 55th Percentile	\$16,594
Percentage Above or Below 45th Percentile	-26.73%
Percentage Above or Below 55th Percentile	-30.50%

Total Matches:	5
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Total Compensation Median	\$19,471
Percentage Above or Below Median	-13.26%

Total Compensation 45th Percentile	\$19,261
Total Compensation 55th Percentile	\$19,594
Percentage Above or Below 45th Percentile	-12.04%
Percentage Above or Below 55th Percentile	-13.98%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Database Administrator

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Database Administrator	\$6,297	\$8,039	\$402			\$2,311	\$147	\$26	\$740	\$117	\$11,782
Central Contra Costa County Transit Authority	No Comparable Class											
City of Santa Cruz	Systems Coordinator	\$7,092	\$9,598	\$240			\$2,010	\$127	\$19	\$881	\$734	\$13,609
County of Santa Cruz	IT System Developer/Analyst III	\$8,226	\$10,410			\$2,004				\$852	\$763	\$14,030
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	No Comparable Class											
San Joaquin Regional Transit District	Senior IT Specialist	\$5,292	\$7,565		\$757		\$1,825	\$107	\$24		\$579	\$10,856
Santa Barbara Metropolitan Transit District	No Comparable Class											

Base Salary Median	\$9,598
Percentage Above or Below Median	-19.39%

Base Salary 45th Percentile	\$9,395
Base Salary 55th Percentile	\$9,679
Percentage Above or Below 45th Percentile	-16.86%
Percentage Above or Below 55th Percentile	-20.40%

Total Matches:	3
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Total Compensation Median	\$13,609
Percentage Above or Below Median	-15.51%

Total Compensation 45th Percentile	\$13,334
Total Compensation 55th Percentile	\$13,651
Percentage Above or Below 45th Percentile	-13.17%
Percentage Above or Below 55th Percentile	-15.87%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Executive Assistant

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Executive Assistant	\$5,333	\$6,810	\$341			\$2,311	\$147	\$26	\$627	\$99	\$10,361
Central Contra Costa County Transit Authority	Clerk to the Board/Assistant to GM	\$5,651	\$7,681				\$1,678	\$43	\$28	\$623	\$111	\$10,165
City of Santa Cruz	Deputy City Clerk-Administrator	\$5,191	\$7,026	\$176			\$2,010	\$127	\$19	\$645	\$537	\$10,540
County of Santa Cruz	Chief Deputy Clerk-Board of Supervisors	\$7,408	\$9,868			\$2,004				\$808	\$755	\$13,435
Monterey Salinas Transit District	Executive Assistant to the General Manager/Clerk of Board	\$4,669	\$6,758				\$1,937			\$577	\$98	\$9,370
Riverside Transit Agency	Executive Assistant/Clerk to the Board	\$6,010	\$9,316		\$25		\$1,217	\$18		\$777	\$135	\$11,488
San Joaquin Regional Transit District	Executive and Board Support Analyst	\$3,953	\$5,815		\$582		\$1,825	\$107	\$24		\$445	\$8,797
Santa Barbara Metropolitan Transit District	Data Not Available											

Base Salary Median	\$7,354
Percentage Above or Below Median	-7.98%

Total Compensation Median	\$10,352
Percentage Above or Below Median	0.08%

Base Salary 45th Percentile	\$7,190
Base Salary 55th Percentile	\$7,517
Percentage Above or Below 45th Percentile	-5.58%
Percentage Above or Below 55th Percentile	-10.39%

Total Compensation 45th Percentile	\$10,258
Total Compensation 55th Percentile	\$10,446
Percentage Above or Below 45th Percentile	0.98%
Percentage Above or Below 55th Percentile	-0.83%

Total Matches:	6
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Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Facilities Manager

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	No Comparable Class, New Classification											
Central Contra Costa County Transit Authority	Director of Maintenance (Facilities)	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	Building Maintenance Superintendent	\$7,833	\$10,457			\$2,004				\$856	\$764	\$14,081
Monterey Salinas Transit District	Facilities/Capital Projects Manager	\$6,436	\$9,316				\$1,937			\$796	\$135	\$12,184
Riverside Transit Agency	No Comparable Class											
San Joaquin Regional Transit District	Facilities Superintendent	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	No Comparable Class											

Base Salary Median	\$9,957
Percentage Above or Below Median	
Base Salary 45th Percentile	\$9,806
Base Salary 55th Percentile	\$10,107
Percentage Above or Below 45th Percentile	
Percentage Above or Below 55th Percentile	
Total Matches:	4

Total Compensation Median	\$13,581
Percentage Above or Below Median	
Total Compensation 45th Percentile	\$13,431
Total Compensation 55th Percentile	\$13,731
Percentage Above or Below 45th Percentile	
Percentage Above or Below 55th Percentile	

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Finance Deputy Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Finance Deputy Director	\$7,876	\$10,055	\$503			\$2,311	\$147	\$26	\$926	\$146	\$14,114
Central Contra Costa County Transit Authority	Manager of Accounting	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	Assistant Director of Finance	\$8,845	\$11,971	\$299			\$2,010	\$127	\$19	\$1,099	\$786	\$16,311
County of Santa Cruz	Chief Deputy Auditor-Controller	\$12,034	\$16,130			\$2,004				\$1,321	\$846	\$20,301
Monterey Salinas Transit District	General Accountant and Budget Manager	\$7,281	\$10,541				\$1,937			\$900	\$153	\$13,531
Riverside Transit Agency	Controller	\$7,829	\$12,526		\$25		\$1,217	\$18		\$1,044	\$182	\$15,012
San Joaquin Regional Transit District	No Comparable Classification											
Santa Barbara Metropolitan Transit District	No Comparable Classification											

Base Salary Median	\$12,017
Percentage Above or Below Median	-19.51%

Base Salary 45th Percentile	\$12,008
Base Salary 55th Percentile	\$12,119
Percentage Above or Below 45th Percentile	-19.42%
Percentage Above or Below 55th Percentile	-20.53%

Total Matches:	5
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Total Compensation Median	\$15,012
Percentage Above or Below Median	-6.36%

Total Compensation 45th Percentile	\$14,993
Total Compensation 55th Percentile	\$15,272
Percentage Above or Below 45th Percentile	-6.23%
Percentage Above or Below 55th Percentile	-8.21%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Human Resources Deputy Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Human Resources Deputy Director	\$6,814	\$8,694	\$435			\$2,311	\$147	\$26	\$801	\$126	\$12,540
Central Contra Costa County Transit Authority	Director of Recruitment & Employee Development	\$7,833	\$15,153				\$1,678	\$43	\$28	\$219	\$1,228	\$18,350
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	Deputy Personnel Director	\$10,707	\$14,340			\$2,004				\$1,174	\$820	\$18,338
Monterey Salinas Transit District	Human Resources Manager	\$5,976	\$8,651				\$1,937			\$739	\$125	\$11,452
Riverside Transit Agency	Human Resources Manager	\$6,781	\$10,850		\$25		\$1,217	\$18		\$905	\$157	\$13,172
San Joaquin Regional Transit District	Human Resources Manager	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	No Comparable Class											

Base Salary Median	\$10,850
Percentage Above or Below Median	-24.80%

Base Salary 45th Percentile	\$10,571
Base Salary 55th Percentile	\$11,548
Percentage Above or Below 45th Percentile	-21.59%
Percentage Above or Below 55th Percentile	-32.83%

Total Matches:	5
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Total Compensation Median	\$13,172
Percentage Above or Below Median	-5.04%

Total Compensation 45th Percentile	\$13,154
Total Compensation 55th Percentile	\$14,205
Percentage Above or Below 45th Percentile	-4.90%
Percentage Above or Below 55th Percentile	-13.28%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Human Resources Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Human Resources Director	\$9,053	\$11,558	\$578			\$2,311	\$147	\$26	\$1,065	\$168	\$15,852
Central Contra Costa County Transit Authority	Director of Human Resources	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	Director of Human Resources	\$12,564	\$16,031	\$401			\$1,980	\$127	\$19	\$1,471	\$845	\$20,874
County of Santa Cruz	Personnel Director	\$12,811	\$17,165			\$2,004				\$1,405	\$861	\$21,436
Monterey Salinas Transit District	Director of Human Resources/Risk Management	\$8,444	\$12,224				\$1,937			\$1,044	\$177	\$15,382
Riverside Transit Agency	Chief Administrative Services Officer/EEO Officer	\$9,578	\$15,804		\$25		\$1,217	\$18		\$1,318	\$229	\$18,611
San Joaquin Regional Transit District	Director of Human Resources	\$9,127	\$13,156		\$1,316		\$1,825	\$107	\$24		\$803	\$17,231
Santa Barbara Metropolitan Transit District	HR and Risk Manager	\$8,670	\$8,670		\$867	\$2,200					\$663	\$12,400

Base Salary Median	\$15,153
Percentage Above or Below Median	-31.10%

Base Salary 45th Percentile	\$14,554
Base Salary 55th Percentile	\$15,348
Percentage Above or Below 45th Percentile	-25.92%
Percentage Above or Below 55th Percentile	-32.79%

Total Matches:	7
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Total Compensation Median	\$18,351
Percentage Above or Below Median	-15.77%

Total Compensation 45th Percentile	\$18,015
Total Compensation 55th Percentile	\$18,429
Percentage Above or Below 45th Percentile	-13.64%
Percentage Above or Below 55th Percentile	-16.26%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Information Technology and Intelligent Transportation Systems Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Information Technology and Intelligent Transportation Systems Director	\$8,155	\$10,409	\$520			\$2,311	\$147	\$26	\$959	\$151	\$14,523
Central Contra Costa County Transit Authority	Director of Information Technology	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	Director of Information Technology	\$12,564	\$16,031	\$401			\$1,980	\$127	\$19	\$1,471	\$845	\$20,874
County of Santa Cruz	Director Information Services	\$13,282	\$17,806			\$2,004				\$1,458	\$870	\$22,138
Monterey Salinas Transit District	Director of Information Technology	\$8,444	\$12,224				\$1,937			\$1,044	\$177	\$15,382
Riverside Transit Agency	Director of Information Technology	\$8,867	\$14,630		\$25		\$1,217	\$18		\$1,220	\$212	\$17,322
San Joaquin Regional Transit District	Chief Technology Officer	\$11,250	\$15,833		\$1,583		\$1,825	\$107	\$24		\$842	\$20,214
Santa Barbara Metropolitan Transit District	IT Manager	\$8,372	\$8,372		\$837	\$2,200					\$640	\$12,050

Base Salary Median	\$15,153
Percentage Above or Below Median	-45.58%

Total Compensation Median	\$18,351
Percentage Above or Below Median	-26.36%

Base Salary 45th Percentile	\$14,996
Base Salary 55th Percentile	\$15,357
Percentage Above or Below 45th Percentile	-44.07%
Percentage Above or Below 55th Percentile	-47.54%

Total Compensation 45th Percentile	\$18,042
Total Compensation 55th Percentile	\$18,910
Percentage Above or Below 45th Percentile	-24.23%
Percentage Above or Below 55th Percentile	-30.21%

Total Matches:	7
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Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Maintenance Manager

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Maintenance Manager	\$9,053	\$11,558	\$578			\$2,311	\$147	\$26	\$1,065	\$168	\$15,852
Central Contra Costa County Transit Authority	Director of Maintenance (Fleet)	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	Public Works Operations Manager	\$7,310	\$9,893	\$247			\$2,010	\$127	\$19	\$908	\$756	\$13,960
County of Santa Cruz	Deputy Director of General Services	\$10,975	\$14,716			\$2,004				\$1,205	\$826	\$18,751
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Director of Maintenance	\$9,578	\$15,804		\$25		\$1,217	\$18		\$1,318	\$229	\$18,611
San Joaquin Regional Transit District	Maintenance Superintendent	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Acting Manager of Maintenance	\$8,750	\$8,750		\$875	\$2,200					\$669	\$12,494

Base Salary Median	\$12,305
Percentage Above or Below Median	-6.46%

Base Salary 45th Percentile	\$11,099
Base Salary 55th Percentile	\$13,510
Percentage Above or Below 45th Percentile	3.97%
Percentage Above or Below 55th Percentile	-16.89%

Total Matches:	6
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Total Compensation Median	\$16,156
Percentage Above or Below Median	-1.92%

Total Compensation 45th Percentile	\$15,058
Total Compensation 55th Percentile	\$17,253
Percentage Above or Below 45th Percentile	5.01%
Percentage Above or Below 55th Percentile	-8.84%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Marketing, Communications and Customer Service Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Marketing, Communications and Customer Service Director	\$8,155	\$10,409	\$520			\$2,311	\$147	\$26	\$959	\$151	\$14,523
Central Contra Costa County Transit Authority	Manager of Planning (Marketing and Community Outreach)	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	No Comparable Class											
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Director of Marketing	\$8,867	\$14,630		\$25		\$1,217	\$18		\$1,220	\$212	\$17,322
San Joaquin Regional Transit District	Marketing Manager	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Marketing and Community Relations Manager	\$6,503	\$6,503		\$650	\$2,200					\$497	\$9,851

Base Salary Median	\$10,737
Percentage Above or Below Median	-3.15%

Total Compensation Median	\$13,998
Percentage Above or Below Median	3.61%

Base Salary 45th Percentile	\$10,352
Base Salary 55th Percentile	\$11,121
Percentage Above or Below 45th Percentile	0.54%
Percentage Above or Below 55th Percentile	-6.84%

Total Compensation 45th Percentile	\$13,723
Total Compensation 55th Percentile	\$14,273
Percentage Above or Below 45th Percentile	5.51%
Percentage Above or Below 55th Percentile	1.72%

Total Matches:	4
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Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Operations Manager- Paratransit Division

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Operations Manager- Paratransit Division	\$6,814	\$8,694	\$435			\$2,311	\$147	\$26	\$801	\$126	\$12,540
Central Contra Costa County Transit Authority	Manager of Accessible Services	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	No Comparable Class											
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Contract Operations Manager	\$6,781	\$10,850		\$25		\$1,217	\$18		\$905	\$157	\$13,172
San Joaquin Regional Transit District	Mobility Manager	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Operations Manager	\$9,074	\$9,074		\$907	\$2,200					\$694	\$12,876

Base Salary Median	\$10,153
Percentage Above or Below Median	-16.78%

Base Salary 45th Percentile	\$9,944
Base Salary 55th Percentile	\$10,362
Percentage Above or Below 45th Percentile	-14.38%
Percentage Above or Below 55th Percentile	-19.19%

Total Matches:	4
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Total Compensation Median	\$13,126
Percentage Above or Below Median	-4.68%

Total Compensation 45th Percentile	\$13,113
Total Compensation 55th Percentile	\$13,140
Percentage Above or Below 45th Percentile	-4.57%
Percentage Above or Below 55th Percentile	-4.79%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Operations Manager-Fixed Route Division

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Operations Manager-Fixed Route Division	\$6,814	\$8,694	\$435			\$2,311	\$147	\$26	\$801	\$126	\$12,540
Central Contra Costa County Transit Authority	Director of Transportation	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	No Comparable Class											
Monterey Salinas Transit District	Deputy Chief Operating Officer	\$8,655	\$13,164				\$1,937			\$1,124	\$191	\$16,416
Riverside Transit Agency	Operations Manager	\$6,781	\$10,850		\$25		\$1,217	\$18		\$905	\$157	\$13,172
San Joaquin Regional Transit District	Transportation Superintendent	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Operations Manager	\$9,074	\$9,074		\$907	\$2,200					\$694	\$12,876

Base Salary Median	\$10,850
Percentage Above or Below Median	-24.80%

Base Salary 45th Percentile	\$10,571
Base Salary 55th Percentile	\$11,313
Percentage Above or Below 45th Percentile	-21.59%
Percentage Above or Below 55th Percentile	-30.12%

Total Matches:	5
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Total Compensation Median	\$13,172
Percentage Above or Below Median	-5.04%

Total Compensation 45th Percentile	\$13,154
Total Compensation 55th Percentile	\$13,821
Percentage Above or Below 45th Percentile	-4.90%
Percentage Above or Below 55th Percentile	-10.22%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Planning and Development Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Planning and Development Director	\$9,053	\$11,558	\$578			\$2,311	\$147	\$26	\$1,065	\$168	\$15,852
Central Contra Costa County Transit Authority	Manager of Planning (Planning and Scheduling)	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	Director Planning and Community Development	\$12,564	\$16,031	\$401			\$1,980	\$127	\$19	\$1,471	\$845	\$20,874
County of Santa Cruz	Planning Director	\$13,710	\$18,363			\$2,004				\$1,504	\$879	\$22,749
Monterey Salinas Transit District	Director of Planning and Development	\$8,444	\$12,224				\$1,937			\$1,044	\$177	\$15,382
Riverside Transit Agency	Director of Planning	\$9,578	\$15,804		\$25		\$1,217	\$18		\$1,318	\$229	\$18,611
San Joaquin Regional Transit District	Planning Director-Service Development	\$9,127	\$13,156		\$1,316		\$1,825	\$107	\$24		\$803	\$17,231
Santa Barbara Metropolitan Transit District	Plant Manager	\$8,126	\$8,126		\$813	\$2,200					\$622	\$11,760

Base Salary Median	\$13,156
Percentage Above or Below Median	-13.83%

Base Salary 45th Percentile	\$12,876
Base Salary 55th Percentile	\$13,950
Percentage Above or Below 45th Percentile	-11.41%
Percentage Above or Below 55th Percentile	-20.70%

Total Matches:	7
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Total Compensation Median	\$17,231
Percentage Above or Below Median	-8.70%

Total Compensation 45th Percentile	\$16,676
Total Compensation 55th Percentile	\$17,645
Percentage Above or Below 45th Percentile	-5.20%
Percentage Above or Below 55th Percentile	-11.31%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Purchasing and Special Projects Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Purchasing and Special Projects Director	\$8,155	\$10,409	\$520			\$2,311	\$147	\$26	\$959	\$151	\$14,523
Central Contra Costa County Transit Authority	Manager of Purchasing and Grants	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	Purchasing Manager	\$7,060	\$9,555	\$239			\$2,010	\$127	\$19	\$877	\$731	\$13,558
County of Santa Cruz	No Comparable Class											
Monterey Salinas Transit District	Purchasing Manager	\$6,436	\$9,316				\$1,937			\$796	\$135	\$12,184
Riverside Transit Agency	Chief Procurement and Logistics Officer	\$10,053	\$16,587		\$25		\$1,217	\$18		\$1,383	\$241	\$19,471
San Joaquin Regional Transit District	Director of Procurement	\$9,127	\$13,156		\$1,316		\$1,825	\$107	\$24		\$803	\$17,231
Santa Barbara Metropolitan Transit District	Capital Project Manager	\$7,650	\$7,650		\$765	\$2,200					\$585	\$11,200

Base Salary Median	\$10,786
Percentage Above or Below Median	-3.62%

Total Compensation Median	\$14,237
Percentage Above or Below Median	1.97%

Base Salary 45th Percentile	\$10,171
Base Salary 55th Percentile	\$11,402
Percentage Above or Below 45th Percentile	2.29%
Percentage Above or Below 55th Percentile	-9.54%

Total Compensation 45th Percentile	\$13,897
Total Compensation 55th Percentile	\$14,576
Percentage Above or Below 45th Percentile	4.31%
Percentage Above or Below 55th Percentile	-0.36%

Total Matches:	6
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Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Safety Security and Risk Management Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Safety Security and Risk Management Director	\$6,297	\$8,039	\$402			\$2,311	\$147	\$26	\$740	\$117	\$11,782
Central Contra Costa County Transit Authority	Manager of Training	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	Risk and Safety Manager	\$8,212	\$11,116	\$278			\$2,010	\$127	\$19	\$1,020	\$773	\$15,344
County of Santa Cruz	Risk Manager	\$8,963	\$12,022			\$2,004				\$984	\$787	\$15,797
Monterey Salinas Transit District	Risk and Security Manager	\$5,976	\$8,651				\$1,937			\$739	\$125	\$11,452
Riverside Transit Agency	Director of Risk Management	\$8,551	\$14,109		\$25		\$1,217	\$18		\$1,176	\$205	\$16,750
San Joaquin Regional Transit District	Safety and Risk Manager	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Operations Safety and Training Officer	\$6,503	\$6,503		\$650	\$2,200					\$497	\$9,851

Base Salary Median	\$11,116
Percentage Above or Below Median	-38.28%
Base Salary 45th Percentile	\$10,618
Base Salary 55th Percentile	\$11,386
Percentage Above or Below 45th Percentile	-32.08%
Percentage Above or Below 55th Percentile	-41.64%
Total Matches:	7

Total Compensation Median	\$14,915
Percentage Above or Below Median	-26.59%
Total Compensation 45th Percentile	\$14,365
Total Compensation 55th Percentile	\$15,044
Percentage Above or Below 45th Percentile	-21.92%
Percentage Above or Below 55th Percentile	-27.68%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Senior Database Administrator

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Senior Database Administrator	\$7,290	\$10,234	\$512			\$2,311	\$147	\$26	\$943	\$148	\$14,321
Central Contra Costa County Transit Authority	Developer	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	IT Manager- Applications	\$7,885	\$10,672	\$267			\$2,010	\$127	\$19	\$980	\$767	\$14,841
County of Santa Cruz	IT System Administrator Supervisor	\$9,460	\$11,972			\$2,004				\$980	\$786	\$15,742
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Systems Administrator	\$5,376	\$8,064		\$25		\$1,217	\$18		\$672	\$117	\$10,113
San Joaquin Regional Transit District	Information Technology Administrator	\$6,250	\$8,333		\$833		\$1,825	\$107	\$24		\$637	\$11,760
Santa Barbara Metropolitan Transit District	No Comparable Class											

Base Salary Median	\$10,672
Percentage Above or Below Median	-4.28%

Base Salary 45th Percentile	\$10,204
Base Salary 55th Percentile	\$10,932
Percentage Above or Below 45th Percentile	0.29%
Percentage Above or Below 55th Percentile	-6.82%

Total Matches:	5
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Total Compensation Median	\$14,841
Percentage Above or Below Median	-3.64%

Total Compensation 45th Percentile	\$14,225
Total Compensation 55th Percentile	\$14,856
Percentage Above or Below 45th Percentile	0.67%
Percentage Above or Below 55th Percentile	-3.74%

Attachment A

*Santa Cruz Metropolitan Transit District
Management Total Compensation Report*

Appendix A-2: Datasheets, All Agencies

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Assistant Maintenance Manager

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Assistant Maintenance Manager	\$6,814	\$8,694	\$435			\$2,311	\$147	\$26	\$801	\$126	\$12,540
Alameda Contra Costa Transit District	Assistant Director of Maintenance	\$11,214	\$13,392		\$150		\$3,129	\$250	\$40	\$1,859	\$806	\$19,626
Central Contra Costa County Transit Authority	Facilities Superintendent	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	Building Maintenance Superintendent	\$7,833	\$10,457			\$2,004				\$856	\$764	\$14,081
Golden Gate Transit District	Fleet and Facilities Superintendent	\$9,249	\$11,178			\$2,311				\$1,125	\$774	\$15,388
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Maintenance Manager	\$6,503	\$10,080		\$25		\$1,217	\$18		\$840	\$146	\$12,327
San Joaquin Regional Transit District	No Comparable Class											
Santa Barbara Metropolitan Transit District	Assistant Superintendent of Maintenance	\$8,333	\$8,333		\$833	\$2,200					\$637	\$12,004
Santa Clara Valley Transportation Authority	Maintenance Superintendent	\$9,380	\$11,402				\$2,028	\$70	\$9	\$1,064	\$778	\$15,350

Base Salary Median	\$11,178
Percentage Above or Below Median	-28.57%
Base Salary 45th Percentile	\$10,962
Base Salary 55th Percentile	\$11,245
Percentage Above or Below 45th Percentile	-26.08%
Percentage Above or Below 55th Percentile	-29.34%
Total Matches:	7

Total Compensation Median	\$14,915
Percentage Above or Below Median	-18.95%
Total Compensation 45th Percentile	\$14,665
Total Compensation 55th Percentile	\$15,046
Percentage Above or Below 45th Percentile	-16.95%
Percentage Above or Below 55th Percentile	-19.99%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Assistant Operations Manager (Para Transit Department)

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Assistant Operations Manager (Para Transit Department)	\$5,692	\$7,266	\$363			\$2,311	\$147	\$26	\$669	\$105	\$10,888
Alameda Contra Costa Transit District	No Comparable Class											
Central Contra Costa County Transit Authority	No Comparable Class											
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	No Comparable Class											
Golden Gate Transit District	Superintendent Transportation Operations	\$8,979	\$10,852			\$2,311				\$1,092	\$770	\$15,025
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Assistant Contract Operations Manager	\$5,676	\$8,064		\$25		\$1,217	\$18		\$672	\$117	\$10,113
San Joaquin Regional Transit District	No Comparable Class											
Santa Barbara Metropolitan Transit District	Superintendent of Operations	\$7,370	\$7,370		\$737	\$2,200					\$564	\$10,871
Santa Clara Valley Transportation Authority	No Comparable Class											

Base Salary Median	\$8,064
Percentage Above or Below Median	-10.98%
Base Salary 45th Percentile	\$7,995
Base Salary 55th Percentile	\$8,343
Percentage Above or Below 45th Percentile	-10.03%
Percentage Above or Below 55th Percentile	-14.82%
Total Matches:	3

Total Compensation Median	\$10,871
Percentage Above or Below Median	0.16%
Total Compensation 45th Percentile	\$10,795
Total Compensation 55th Percentile	\$11,286
Percentage Above or Below 45th Percentile	0.85%
Percentage Above or Below 55th Percentile	-3.66%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Chief Financial Officer (CFO)

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Chief Financial Officer (CFO)	\$9,053	\$11,558	\$578			\$2,311	\$147	\$26	\$1,065	\$168	\$15,852
Alameda Contra Costa Transit District	Chief Financial Officer	\$16,471	\$21,046		\$150		\$3,129	\$250	\$40	\$2,921	\$917	\$28,454
Central Contra Costa County Transit Authority	Chief Financial Officer	\$12,446	\$16,738				\$1,678	\$43	\$28	\$1,358	\$243	\$20,088
City of Santa Cruz	Director of Finance	\$12,564	\$16,031	\$401			\$1,980	\$127	\$19	\$1,471	\$845	\$20,874
County of Santa Cruz	Auditor-Controller-Treasurer	\$19,196	\$19,196			\$2,004				\$1,572	\$891	\$23,662
Golden Gate Transit District	CFO/Auditor-Controller	\$19,409	\$19,409			\$2,311				\$1,953	\$894	\$24,567
Monterey Salinas Transit District	Chief Financial Officer	\$9,554	\$13,830				\$1,937			\$1,181	\$201	\$17,149
Riverside Transit Agency	Chief Financial Officer	\$10,053	\$16,587		\$25		\$1,217	\$18		\$1,383	\$241	\$19,471
San Joaquin Regional Transit District	Chief Financial Officer	\$9,677	\$14,226		\$1,423		\$1,825	\$107	\$24		\$819	\$18,423
Santa Barbara Metropolitan Transit District	Comptroller-Procurement Officer	\$10,612	\$10,612		\$1,061	\$2,200					\$766	\$14,639
Santa Clara Valley Transportation Authority	Chief Financial Officer	\$20,417	\$20,417				\$2,028	\$70	\$9	\$1,905	\$908	\$25,337

Base Salary Median	\$16,663
Percentage Above or Below Median	-44.16%
Base Salary 45th Percentile	\$16,595
Base Salary 55th Percentile	\$16,730
Percentage Above or Below 45th Percentile	-43.58%
Percentage Above or Below 55th Percentile	-44.75%
Total Matches:	10

Total Compensation Median	\$20,481
Percentage Above or Below Median	-29.20%
Total Compensation 45th Percentile	\$20,127
Total Compensation 55th Percentile	\$20,835
Percentage Above or Below 45th Percentile	-26.97%
Percentage Above or Below 55th Percentile	-31.43%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Chief Operating Officer (COO)

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Chief Operating Officer (COO)	\$9,960	\$12,716	\$636			\$2,311	\$147	\$26	\$1,171	\$184	\$17,191
Alameda Contra Costa Transit District	Chief Operating Officer	\$16,471	\$21,046		\$150		\$3,129	\$250	\$40	\$2,921	\$917	\$28,454
Central Contra Costa County Transit Authority	Chief Operating Officer	\$12,446	\$16,738				\$1,678	\$43	\$28	\$1,358	\$243	\$20,088
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	Director of General Services	\$12,405	\$16,622			\$2,004				\$1,361	\$853	\$20,840
Golden Gate Transit District	Deputy General Manager - Bus	\$14,839	\$17,933			\$2,311				\$1,805	\$872	\$22,921
Monterey Salinas Transit District	Chief Operating Officer	\$9,093	\$13,164				\$1,937			\$1,124	\$191	\$16,416
Riverside Transit Agency	Chief Operating Officer	\$10,053	\$16,587		\$25		\$1,217	\$18		\$1,383	\$241	\$19,471
San Joaquin Regional Transit District	Chief Operating Officer	\$9,677	\$14,226		\$1,423		\$1,825	\$107	\$24		\$819	\$18,423
Santa Barbara Metropolitan Transit District	Data Not Available											
Santa Clara Valley Transportation Authority	Chief Operating Officer	\$20,250	\$20,250				\$2,028	\$70	\$9	\$1,890	\$906	\$25,152

Base Salary Median	\$16,680
Percentage Above or Below Median	-31.17%
Base Salary 45th Percentile	\$16,639
Base Salary 55th Percentile	\$16,721
Percentage Above or Below 45th Percentile	-30.85%
Percentage Above or Below 55th Percentile	-31.49%
Total Matches:	8

Total Compensation Median	\$20,464
Percentage Above or Below Median	-19.04%
Total Compensation 45th Percentile	\$20,201
Total Compensation 55th Percentile	\$20,727
Percentage Above or Below 45th Percentile	-17.50%
Percentage Above or Below 55th Percentile	-20.57%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Database Administrator

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Database Administrator	\$6,297	\$8,039	\$402			\$2,311	\$147	\$26	\$740	\$117	\$11,782
Alameda Contra Costa Transit District	Database Administrator	\$8,260	\$9,865		\$100		\$3,129	\$250	\$40	\$1,369	\$755	\$15,508
Central Contra Costa County Transit Authority	No Comparable Class											
City of Santa Cruz	Systems Coordinator	\$7,092	\$9,598	\$240			\$2,010	\$127	\$19	\$881	\$734	\$13,609
County of Santa Cruz	IT System Developer/Analyst III	\$8,226	\$10,410			\$2,004				\$852	\$763	\$14,030
Golden Gate Transit District	Senior Systems Administrator	\$7,798	\$9,426			\$2,311				\$949	\$721	\$13,407
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	No Comparable Class											
San Joaquin Regional Transit District	Senior IT Specialist	\$5,292	\$7,565		\$757		\$1,825	\$107	\$24		\$579	\$10,856
Santa Barbara Metropolitan Transit District	No Comparable Class											
Santa Clara Valley Transportation Authority	Database Administrator II	\$7,002	\$8,476				\$2,028	\$70	\$9	\$791	\$648	\$12,022

Base Salary Median	\$9,512
Percentage Above or Below Median	-18.32%
Base Salary 45th Percentile	\$9,469
Base Salary 55th Percentile	\$9,555
Percentage Above or Below 45th Percentile	-17.79%
Percentage Above or Below 55th Percentile	-18.86%
Total Matches:	6

Total Compensation Median	\$13,508
Percentage Above or Below Median	-14.65%
Total Compensation 45th Percentile	\$13,457
Total Compensation 55th Percentile	\$13,559
Percentage Above or Below 45th Percentile	-14.22%
Percentage Above or Below 55th Percentile	-15.08%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Executive Assistant

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Executive Assistant	\$5,333	\$6,810	\$341			\$2,311	\$147	\$26	\$627	\$99	\$10,361
Alameda Contra Costa Transit District	District Secretary	\$7,412	\$8,848									\$8,848
Central Contra Costa County Transit Authority	Clerk to the Board/Assistant to GM	\$5,651	\$7,681				\$1,678	\$43	\$28	\$623	\$111	\$10,165
City of Santa Cruz	Deputy City Clerk-Administrator	\$5,191	\$7,026	\$176			\$2,010	\$127	\$19	\$645	\$537	\$10,540
County of Santa Cruz	Chief Deputy Clerk-Board of Supervisors	\$7,408	\$9,868			\$2,004				\$808	\$755	\$13,435
Golden Gate Transit District	Executive Assistant to the General Manager	\$7,798	\$9,426			\$2,311				\$949	\$721	\$13,407
Monterey Salinas Transit District	Executive Assistant to the General Manager/Clerk of Board	\$4,669	\$6,758				\$1,937			\$577	\$98	\$9,370
Riverside Transit Agency	Executive Assistant/Clerk to the Board	\$6,010	\$9,316		\$25		\$1,217	\$18		\$777	\$135	\$11,488
San Joaquin Regional Transit District	Executive and Board Support Analyst	\$3,953	\$5,815		\$582		\$1,825	\$107	\$24		\$445	\$8,797
Santa Barbara Metropolitan Transit District	Data Not Available											
Santa Clara Valley Transportation Authority	Board Secretary	\$13,250	\$13,250				\$2,028	\$70	\$9	\$1,236	\$804	\$17,398

Base Salary Median	\$8,848
Percentage Above or Below Median	-29.93%
Base Salary 45th Percentile	\$8,381
Base Salary 55th Percentile	\$9,035
Percentage Above or Below 45th Percentile	-23.07%
Percentage Above or Below 55th Percentile	-32.68%
Total Matches:	9

Total Compensation Median	\$10,540
Percentage Above or Below Median	-1.73%
Total Compensation 45th Percentile	\$10,390
Total Compensation 55th Percentile	\$10,919
Percentage Above or Below 45th Percentile	-0.28%
Percentage Above or Below 55th Percentile	-5.39%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Facilities Manager

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	No Comparable Class, New Classification											
Alameda Contra Costa Transit District	Facilities Maintenance Manager	\$10,411	\$12,429		\$150		\$3,129	\$250	\$40	\$1,725	\$792	\$18,516
Central Contra Costa County Transit Authority	Director of Maintenance (Facilities)	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	Building Maintenance Superintendent	\$7,833	\$10,457			\$2,004				\$856	\$764	\$14,081
Golden Gate Transit District	No Comparable Class											
Monterey Salinas Transit District	Facilities/Capital Projects Manager	\$6,436	\$9,316				\$1,937			\$796	\$135	\$12,184
Riverside Transit Agency	No Comparable Class											
San Joaquin Regional Transit District	Facilities Superintendent	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	No Comparable Class											
Santa Clara Valley Transportation Authority	Data Not Available											

Base Salary Median	\$10,457
Percentage Above or Below Median	#DIV/0!
Base Salary 45th Percentile	\$10,257
Base Salary 55th Percentile	\$10,851
Percentage Above or Below 45th Percentile	#DIV/0!
Percentage Above or Below 55th Percentile	#DIV/0!
Total Matches:	5

Total Compensation Median	\$14,081
Percentage Above or Below Median	#VALUE!
Total Compensation 45th Percentile	\$13,881
Total Compensation 55th Percentile	\$14,935
Percentage Above or Below 45th Percentile	#VALUE!
Percentage Above or Below 55th Percentile	#VALUE!

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Finance Deputy Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Finance Deputy Director	\$7,876	\$10,055	\$503			\$2,311	\$147	\$26	\$926	\$146	\$14,114
Alameda Contra Costa Transit District	Controller	\$12,114	\$14,464		\$150		\$3,129	\$250	\$40	\$2,008	\$822	\$20,863
Central Contra Costa County Transit Authority	Manager of Accounting	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	Assistant Director of Finance	\$8,845	\$11,971	\$299			\$2,010	\$127	\$19	\$1,099	\$786	\$16,311
County of Santa Cruz	Chief Deputy Auditor-Controller	\$12,034	\$16,130			\$2,004				\$1,321	\$846	\$20,301
Golden Gate Transit District	Director of Accounting	\$10,589	\$12,854			\$2,311				\$1,293	\$799	\$17,257
Monterey Salinas Transit District	General Accountant and Budget Manager	\$7,281	\$10,541				\$1,937			\$900	\$153	\$13,531
Riverside Transit Agency	Controller	\$7,829	\$12,526		\$25		\$1,217	\$18		\$1,044	\$182	\$15,012
San Joaquin Regional Transit District	No Comparable Classification											
Santa Barbara Metropolitan Transit District	No Comparable Classification											
Santa Clara Valley Transportation Authority	Deputy Director Accounting	\$16,917	\$16,917				\$2,028	\$70	\$9	\$1,579	\$858	\$21,460

Base Salary Median	\$12,690
Percentage Above or Below Median	-26.21%
Base Salary 45th Percentile	\$12,575
Base Salary 55th Percentile	\$12,805
Percentage Above or Below 45th Percentile	-25.06%
Percentage Above or Below 55th Percentile	-27.35%
Total Matches:	8

Total Compensation Median	\$16,784
Percentage Above or Below Median	-18.92%
Total Compensation 45th Percentile	\$16,453
Total Compensation 55th Percentile	\$17,115
Percentage Above or Below 45th Percentile	-16.57%
Percentage Above or Below 55th Percentile	-21.27%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Human Resources Deputy Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Human Resources Deputy Director	\$6,814	\$8,694	\$435			\$2,311	\$147	\$26	\$801	\$126	\$12,540
Alameda Contra Costa Transit District	No Comparable Class											
Central Contra Costa County Transit Authority	Director of Recruitment & Employee Development	\$7,833	\$15,153				\$1,678	\$43	\$28	\$219	\$1,228	\$18,350
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	Deputy Personnel Director	\$10,707	\$14,340			\$2,004				\$1,174	\$820	\$18,338
Golden Gate Transit District	Human Resources Manager	\$8,164	\$9,866			\$2,311				\$993	\$755	\$13,925
Monterey Salinas Transit District	Human Resources Manager	\$5,976	\$8,651				\$1,937			\$739	\$125	\$11,452
Riverside Transit Agency	Human Resources Manager	\$6,781	\$10,850		\$25		\$1,217	\$18		\$905	\$157	\$13,172
San Joaquin Regional Transit District	Human Resources Manager	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	No Comparable Class											
Santa Clara Valley Transportation Authority	Human Resources Manager	\$11,032	\$14,563				\$2,028	\$70	\$9	\$1,359	\$823	\$18,852

Base Salary Median	\$10,850
Percentage Above or Below Median	-24.80%
Base Salary 45th Percentile	\$10,555
Base Salary 55th Percentile	\$11,897
Percentage Above or Below 45th Percentile	-21.40%
Percentage Above or Below 55th Percentile	-36.84%
Total Matches:	7

Total Compensation Median	\$13,925
Percentage Above or Below Median	-11.05%
Total Compensation 45th Percentile	\$13,699
Total Compensation 55th Percentile	\$15,249
Percentage Above or Below 45th Percentile	-9.24%
Percentage Above or Below 55th Percentile	-21.60%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Human Resources Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Human Resources Director	\$9,053	\$11,558	\$578			\$2,311	\$147	\$26	\$1,065	\$168	\$15,852
Alameda Contra Costa Transit District	Executive Director of Human Resources	\$15,556	\$19,216		\$150		\$3,129	\$250	\$40	\$2,667	\$891	\$26,343
Central Contra Costa County Transit Authority	Director of Human Resources	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	Director of Human Resources	\$12,564	\$16,031	\$401			\$1,980	\$127	\$19	\$1,471	\$845	\$20,874
County of Santa Cruz	Personnel Director	\$12,811	\$17,165			\$2,004				\$1,405	\$861	\$21,436
Golden Gate Transit District	Human Resources Director	\$10,951	\$13,238			\$2,311				\$1,332	\$804	\$17,685
Monterey Salinas Transit District	Director of Human Resources/Risk Management	\$8,444	\$12,224				\$1,937			\$1,044	\$177	\$15,382
Riverside Transit Agency	Chief Administrative Services Officer/EEO Officer	\$9,578	\$15,804		\$25		\$1,217	\$18		\$1,318	\$229	\$18,611
San Joaquin Regional Transit District	Director of Human Resources	\$9,127	\$13,156		\$1,316		\$1,825	\$107	\$24		\$803	\$17,231
Santa Barbara Metropolitan Transit District	HR and Risk Manager	\$8,670	\$8,670		\$867	\$2,200					\$663	\$12,400
Santa Clara Valley Transportation Authority	Deputy Director of Business Services	\$16,083	\$16,083				\$2,028	\$70	\$9	\$1,501	\$845	\$20,536

Base Salary Median	\$15,479
Percentage Above or Below Median	-33.92%
Base Salary 45th Percentile	\$15,186
Base Salary 55th Percentile	\$15,771
Percentage Above or Below 45th Percentile	-31.39%
Percentage Above or Below 55th Percentile	-36.45%
Total Matches:	10

Total Compensation Median	\$18,481
Percentage Above or Below Median	-16.58%
Total Compensation 45th Percentile	\$18,364
Total Compensation 55th Percentile	\$18,598
Percentage Above or Below 45th Percentile	-15.85%
Percentage Above or Below 55th Percentile	-17.32%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Information Technology and Intelligent Transportation Systems Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Information Technology and Intelligent Transportation Systems Director	\$8,155	\$10,409	\$520			\$2,311	\$147	\$26	\$959	\$151	\$14,523
Alameda Contra Costa Transit District	Chief Information Officer	\$16,471	\$21,046		\$150		\$3,129	\$250	\$40	\$2,921	\$917	\$28,454
Central Contra Costa County Transit Authority	Director of Information Technology	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	Director of Information Technology	\$12,564	\$16,031	\$401			\$1,980	\$127	\$19	\$1,471	\$845	\$20,874
County of Santa Cruz	Director Information Services	\$13,282	\$17,806			\$2,004				\$1,458	\$870	\$22,138
Golden Gate Transit District	Chief Technology Director	\$11,308	\$13,665			\$2,311				\$1,375	\$810	\$18,162
Monterey Salinas Transit District	Director of Information Technology	\$8,444	\$12,224				\$1,937			\$1,044	\$177	\$15,382
Riverside Transit Agency	Director of Information Technology	\$8,867	\$14,630		\$25		\$1,217	\$18		\$1,220	\$212	\$17,322
San Joaquin Regional Transit District	Chief Technology Officer	\$11,250	\$15,833		\$1,583		\$1,825	\$107	\$24		\$842	\$20,214
Santa Barbara Metropolitan Transit District	IT Manager	\$8,372	\$8,372		\$837	\$2,200					\$640	\$12,050
Santa Clara Valley Transportation Authority	Chief Information Officer	\$18,333	\$18,333				\$2,028	\$70	\$9	\$1,711	\$878	\$23,029

Base Salary Median	\$15,493
Percentage Above or Below Median	-48.84%
Base Salary 45th Percentile	\$15,187
Base Salary 55th Percentile	\$15,799
Percentage Above or Below 45th Percentile	-45.90%
Percentage Above or Below 55th Percentile	-51.78%
Total Matches:	10

Total Compensation Median	\$19,283
Percentage Above or Below Median	-32.77%
Total Compensation 45th Percentile	\$18,444
Total Compensation 55th Percentile	\$20,121
Percentage Above or Below 45th Percentile	-27.00%
Percentage Above or Below 55th Percentile	-38.54%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Maintenance Manager

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Maintenance Manager	\$9,053	\$11,558	\$578			\$2,311	\$147	\$26	\$1,065	\$168	\$15,852
Alameda Contra Costa Transit District	Director of Maintenance	\$14,125	\$16,863		\$150		\$3,129	\$250	\$40	\$2,341	\$857	\$23,629
Central Contra Costa County Transit Authority	Director of Maintenance (Fleet)	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	Public Works Operations Manager	\$7,310	\$9,893	\$247			\$2,010	\$127	\$19	\$908	\$756	\$13,960
County of Santa Cruz	Deputy Director of General Services	\$10,975	\$14,716			\$2,004				\$1,205	\$826	\$18,751
Golden Gate Transit District	Fleet and Facilities Superintendent	\$9,249	\$11,178			\$2,311				\$1,125	\$774	\$15,388
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Director of Maintenance	\$9,578	\$15,804		\$25		\$1,217	\$18		\$1,318	\$229	\$18,611
San Joaquin Regional Transit District	Maintenance Superintendent	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Acting Manager of Maintenance	\$8,750	\$8,750		\$875	\$2,200					\$669	\$12,494
Santa Clara Valley Transportation Authority	Operations Manager (Maintenance)	\$11,587	\$15,294				\$2,028	\$70	\$9	\$1,427	\$834	\$19,662

Base Salary Median	\$14,716
Percentage Above or Below Median	-27.32%
Base Salary 45th Percentile	\$13,301
Base Salary 55th Percentile	\$14,891
Percentage Above or Below 45th Percentile	-15.08%
Percentage Above or Below 55th Percentile	-28.84%
Total Matches:	9

Total Compensation Median	\$18,351
Percentage Above or Below Median	-15.77%
Total Compensation 45th Percentile	\$17,166
Total Compensation 55th Percentile	\$18,455
Percentage Above or Below 45th Percentile	-8.29%
Percentage Above or Below 55th Percentile	-16.42%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Marketing, Communications and Customer Service Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Marketing, Communications and Customer Service Director	\$8,155	\$10,409	\$520			\$2,311	\$147	\$26	\$959	\$151	\$14,523
Alameda Contra Costa Transit District	Executive Director of External Affairs, Marketing and Communications	\$15,556	\$19,216		\$150		\$3,129	\$250	\$40	\$2,667	\$891	\$26,343
Central Contra Costa County Transit Authority	Manager of Planning (Marketing and Community Outreach)	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	No Comparable Class											
Golden Gate Transit District	Marketing and Communications Director	\$10,951	\$13,238			\$2,311				\$1,332	\$804	\$17,685
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Director of Marketing	\$8,867	\$14,630		\$25		\$1,217	\$18		\$1,220	\$212	\$17,322
San Joaquin Regional Transit District	Marketing Manager	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Marketing and Community Relations Manager	\$6,503	\$6,503		\$650	\$2,200					\$497	\$9,851
Santa Clara Valley Transportation Authority	Director of Communications	\$16,167	\$16,167				\$2,028	\$70	\$9	\$1,509	\$847	\$20,629

Base Salary Median	\$13,238
Percentage Above or Below Median	-27.18%
Base Salary 45th Percentile	\$12,872
Base Salary 55th Percentile	\$13,656
Percentage Above or Below 45th Percentile	-23.66%
Percentage Above or Below 55th Percentile	-31.19%
Total Matches:	7

Total Compensation Median	\$17,322
Percentage Above or Below Median	-19.27%
Total Compensation 45th Percentile	\$16,600
Total Compensation 55th Percentile	\$17,431
Percentage Above or Below 45th Percentile	-14.30%
Percentage Above or Below 55th Percentile	-20.02%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Operations Manager- Paratransit Division

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Operations Manager- Paratransit Division	\$6,814	\$8,694	\$435			\$2,311	\$147	\$26	\$801	\$126	\$12,540
Alameda Contra Costa Transit District	No Comparable Class											
Central Contra Costa County Transit Authority	Manager of Accessible Services	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	No Comparable Class											
Golden Gate Transit District	Superintendent Transportation Operations	\$8,979	\$10,852			\$2,311				\$1,092	\$770	\$15,025
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Contract Operations Manager	\$6,781	\$10,850		\$25		\$1,217	\$18		\$905	\$157	\$13,172
San Joaquin Regional Transit District	Mobility Manager	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Operations Manager	\$9,074	\$9,074		\$907	\$2,200					\$694	\$12,876
Santa Clara Valley Transportation Authority	Regional Transportation Services Manager	\$10,007	\$13,209				\$2,028	\$70	\$9	\$1,233	\$804	\$17,352

Base Salary Median	\$10,851
Percentage Above or Below Median	-24.81%
Base Salary 45th Percentile	\$10,851
Base Salary 55th Percentile	\$10,852
Percentage Above or Below 45th Percentile	-24.80%
Percentage Above or Below 55th Percentile	-24.82%
Total Matches:	6

Total Compensation Median	\$14,044
Percentage Above or Below Median	-11.99%
Total Compensation 45th Percentile	\$13,608
Total Compensation 55th Percentile	\$14,479
Percentage Above or Below 45th Percentile	-8.52%
Percentage Above or Below 55th Percentile	-15.47%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Operations Manager-Fixed Route Division

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Operations Manager-Fixed Route Division	\$6,814	\$8,694	\$435			\$2,311	\$147	\$26	\$801	\$126	\$12,540
Alameda Contra Costa Transit District	Director of Transportation	\$14,125	\$16,863		\$150		\$3,129	\$250	\$40	\$2,341	\$857	\$23,629
Central Contra Costa County Transit Authority	Director of Transportation	\$7,833	\$15,153				\$1,678	\$43	\$28	\$1,230	\$220	\$18,351
City of Santa Cruz	No Comparable Class											
County of Santa Cruz	No Comparable Class											
Golden Gate Transit District	Superintendent Transportation Operations	\$8,979	\$10,852			\$2,311				\$1,092	\$770	\$15,025
Monterey Salinas Transit District	Deputy Chief Operating Officer	\$8,655	\$13,164				\$1,937			\$1,124	\$191	\$16,416
Riverside Transit Agency	Operations Manager	\$6,781	\$10,850		\$25		\$1,217	\$18		\$905	\$157	\$13,172
San Joaquin Regional Transit District	Transportation Superintendent	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Operations Manager	\$9,074	\$9,074		\$907	\$2,200					\$694	\$12,876
Santa Clara Valley Transportation Authority	Operations Manager	\$11,587	\$15,294				\$2,028	\$70	\$9	\$1,427	\$834	\$19,662

Base Salary Median	\$12,008
Percentage Above or Below Median	-38.12%
Base Salary 45th Percentile	\$11,199
Base Salary 55th Percentile	\$12,817
Percentage Above or Below 45th Percentile	-28.81%
Percentage Above or Below 55th Percentile	-47.43%
Total Matches:	8

Total Compensation Median	\$15,720
Percentage Above or Below Median	-25.37%
Total Compensation 45th Percentile	\$15,233
Total Compensation 55th Percentile	\$16,207
Percentage Above or Below 45th Percentile	-21.48%
Percentage Above or Below 55th Percentile	-29.25%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Planning and Development Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Planning and Development Director	\$9,053	\$11,558	\$578			\$2,311	\$147	\$26	\$1,065	\$168	\$15,852
Alameda Contra Costa Transit District	Executive Director of Planning and Engineering	\$15,556	\$19,216		\$150		\$3,129	\$250	\$40	\$2,667	\$891	\$26,343
Central Contra Costa County Transit Authority	Manager of Planning (Planning and Scheduling)	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	Director Planning and Community Development	\$12,564	\$16,031	\$401			\$1,980	\$127	\$19	\$1,471	\$845	\$20,874
County of Santa Cruz	Planning Director	\$13,710	\$18,363			\$2,004				\$1,504	\$879	\$22,749
Golden Gate Transit District	Director of Planning	\$11,308	\$13,666			\$2,311				\$1,375	\$810	\$18,163
Monterey Salinas Transit District	Director of Planning and Development	\$8,444	\$12,224				\$1,937			\$1,044	\$177	\$15,382
Riverside Transit Agency	Director of Planning	\$9,578	\$15,804		\$25		\$1,217	\$18		\$1,318	\$229	\$18,611
San Joaquin Regional Transit District	Planning Director-Service Development	\$9,127	\$13,156		\$1,316		\$1,825	\$107	\$24		\$803	\$17,231
Santa Barbara Metropolitan Transit District	Plant Manager	\$8,126	\$8,126		\$813	\$2,200					\$622	\$11,760
Santa Clara Valley Transportation Authority	Director of Planning and Programming	\$16,083	\$16,083				\$2,028	\$70	\$9	\$1,501	\$845	\$20,536

Base Salary Median	\$14,735
Percentage Above or Below Median	-27.49%
Base Salary 45th Percentile	\$13,773
Base Salary 55th Percentile	\$15,697
Percentage Above or Below 45th Percentile	-19.16%
Percentage Above or Below 55th Percentile	-35.81%
Total Matches:	10

Total Compensation Median	\$18,387
Percentage Above or Below Median	-15.99%
Total Compensation 45th Percentile	\$18,185
Total Compensation 55th Percentile	\$18,588
Percentage Above or Below 45th Percentile	-14.72%
Percentage Above or Below 55th Percentile	-17.26%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Purchasing and Special Projects Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Purchasing and Special Projects Director	\$8,155	\$10,409	\$520			\$2,311	\$147	\$26	\$959	\$151	\$14,523
Alameda Contra Costa Transit District	Procurement and Materials Director	\$12,114	\$14,464		\$150		\$3,129	\$250	\$40	\$2,008	\$822	\$20,863
Central Contra Costa County Transit Authority	Manager of Purchasing and Grants	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	Purchasing Manager	\$7,060	\$9,555	\$239			\$2,010	\$127	\$19	\$877	\$731	\$13,558
County of Santa Cruz	No Comparable Class											
Golden Gate Transit District	Procurement Director	\$10,951	\$13,238			\$2,311				\$1,332	\$804	\$17,685
Monterey Salinas Transit District	Purchasing Manager	\$6,436	\$9,316				\$1,937			\$796	\$135	\$12,184
Riverside Transit Agency	Chief Procurement and Logistics Officer	\$10,053	\$16,587		\$25		\$1,217	\$18		\$1,383	\$241	\$19,471
San Joaquin Regional Transit District	Director of Procurement	\$9,127	\$13,156		\$1,316		\$1,825	\$107	\$24		\$803	\$17,231
Santa Barbara Metropolitan Transit District	Capital Project Manager	\$7,650	\$7,650		\$765	\$2,200					\$585	\$11,200
Santa Clara Valley Transportation Authority	Manager of Procurement Contracts and Materials	\$12,165	\$16,058				\$2,028	\$70	\$9	\$1,498	\$845	\$20,508

Base Salary Median	\$13,156
Percentage Above or Below Median	-26.39%
Base Salary 45th Percentile	\$12,700
Base Salary 55th Percentile	\$13,189
Percentage Above or Below 45th Percentile	-22.01%
Percentage Above or Below 55th Percentile	-26.71%
Total Matches:	9

Total Compensation Median	\$17,231
Percentage Above or Below Median	-18.64%
Total Compensation 45th Percentile	\$16,304
Total Compensation 55th Percentile	\$17,413
Percentage Above or Below 45th Percentile	-12.27%
Percentage Above or Below 55th Percentile	-19.89%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Safety Security and Risk Management Director

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Safety Security and Risk Management Director	\$6,297	\$8,039	\$402			\$2,311	\$147	\$26	\$740	\$117	\$11,782
Alameda Contra Costa Transit District	Executive Director of Safety, Security and Training	\$15,556	\$19,216		\$150		\$3,129	\$250	\$40	\$2,667	\$891	\$26,343
Central Contra Costa County Transit Authority	Manager of Training	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	Risk and Safety Manager	\$8,212	\$11,116	\$278			\$2,010	\$127	\$19	\$1,020	\$773	\$15,344
County of Santa Cruz	Risk Manager	\$8,963	\$12,022			\$2,004				\$984	\$787	\$15,797
Golden Gate Transit District	Director Risk Management and Safety	\$9,835	\$11,886			\$2,311				\$1,196	\$785	\$16,178
Monterey Salinas Transit District	Risk and Security Manager	\$5,976	\$8,651				\$1,937			\$739	\$125	\$11,452
Riverside Transit Agency	Director of Risk Management	\$8,551	\$14,109		\$25		\$1,217	\$18		\$1,176	\$205	\$16,750
San Joaquin Regional Transit District	Safety and Risk Manager	\$6,430	\$9,456		\$946		\$1,825	\$107	\$24		\$723	\$13,081
Santa Barbara Metropolitan Transit District	Operations Safety and Training Officer	\$6,503	\$6,503		\$650	\$2,200					\$497	\$9,851
Santa Clara Valley Transportation Authority	Data Not Available											

Base Salary Median	\$11,886
Percentage Above or Below Median	-47.85%
Base Salary 45th Percentile	\$11,578
Base Salary 55th Percentile	\$11,938
Percentage Above or Below 45th Percentile	-44.02%
Percentage Above or Below 55th Percentile	-48.51%
Total Matches:	9

Total Compensation Median	\$15,344
Percentage Above or Below Median	-30.23%
Total Compensation 45th Percentile	\$15,172
Total Compensation 55th Percentile	\$15,525
Percentage Above or Below 45th Percentile	-28.78%
Percentage Above or Below 55th Percentile	-31.77%

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report



Senior Database Administrator

Surveyed Agency	Classification Title	Monthly Min.	Monthly Max.	Longevity Pay	Deferred Comp	Cafeteria Plan	Health	Dental	Vision	Retirement	Social Security	Monthly Total Compensation
Santa Cruz Metro Transit District	Senior Database Administrator	\$7,290	\$10,234	\$512			\$2,311	\$147	\$26	\$943	\$148	\$14,321
Alameda Contra Costa Transit District	Enterprise Software Engineer	\$10,411	\$12,429		\$100		\$3,129	\$250	\$40	\$1,725	\$792	\$18,466
Central Contra Costa County Transit Authority	Developer	\$6,139	\$12,017				\$1,678	\$43	\$28	\$975	\$174	\$14,915
City of Santa Cruz	IT Manager- Applications	\$7,885	\$10,672	\$267			\$2,010	\$127	\$19	\$980	\$767	\$14,841
County of Santa Cruz	IT System Administrator Supervisor	\$9,460	\$11,972			\$2,004				\$980	\$786	\$15,742
Golden Gate Transit District	Information Systems Database Engineer	\$8,177	\$9,887			\$2,311				\$995	\$756	\$13,949
Monterey Salinas Transit District	No Comparable Class											
Riverside Transit Agency	Systems Administrator	\$5,376	\$8,064		\$25		\$1,217	\$18		\$672	\$117	\$10,113
San Joaquin Regional Transit District	Information Technology Administrator	\$6,250	\$8,333		\$833		\$1,825	\$107	\$24		\$637	\$11,760
Santa Barbara Metropolitan Transit District	No Comparable Class											
Santa Clara Valley Transportation Authority	Senior Database Administrator	\$8,148	\$9,876				\$2,028	\$70	\$9	\$922	\$755	\$13,660

Base Salary Median	\$10,280
Percentage Above or Below Median	-0.44%
Base Salary 45th Percentile	\$10,005
Base Salary 55th Percentile	\$10,554
Percentage Above or Below 45th Percentile	2.24%
Percentage Above or Below 55th Percentile	-3.13%
Total Matches:	8

Total Compensation Median	\$14,395
Percentage Above or Below Median	-0.52%
Total Compensation 45th Percentile	\$14,082
Total Compensation 55th Percentile	\$14,707
Percentage Above or Below 45th Percentile	1.66%
Percentage Above or Below 55th Percentile	-2.70%

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*Santa Cruz Metropolitan Transit District
Management Total Compensation Report*

Appendix B: Benefits Summary Tables

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Table B-1: Agency Budgeted and Actual FTEs, Step Plans, Cost of Living Adjustments, and other Pay Increase

Agency	Budgeted	Actual	Step Plan	Step Plan Depends on classification	Range Management	COLAs	Salary Movement
Santa Cruz Metro Transit District	313	309	6	No	N/A	None	Step increases dependent on eligibility on salary range and satisfactory performance
Alameda Contra Costa Transit District	2,243	DNA	Represented 7	Yes	Unrepresented/At-Will Salary Range	Represented - 3.25% - 7/1/2019 Unrepresented/At-Will- negotiated 3.25% - 7/1/2019	At-Will Executive: Negotiated compensation Represented & Unrepresented/At-Will: Not performance based Based on length of service only
Central Contra Costa County Transit Authority	275	DNA	N/A	N/A	Mid-Point	Unknown	The Executive Director or his or her designee shall develop an annual
City of Santa Cruz	873.78	DNA	10	Yes	N/A	Executive, 7/1/2018 – 2% Mid-Management, 8/25/18 - 2%	Meritorious job performance
County of Santa Cruz	2,437.65 ⁷	DNA	7	Yes	N/A	Executive Mgmt.: Unknown Mid-Management - 9/2018- 2.75%; 9/2019-2.75%, 9/2020 2.75% General – 9/2019- 2.75%	Step Advancement: predicated on merit and length of service.
Golden Gate Trans District	820	DNA	DNA	DNA	DNA	Unknown	DNA
Monterey Salinas Transit District	276	275	N/A	N/A	Mid-Point	Unknown	Based on performance

⁷ Based on FY 17/18 Budget document FY 18/19 not available

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Agency	Budgeted	Actual	Step Plan	Step Plan Depends on classification	Range Management	COLAs	Salary Movement
							Incentive Pay Program – 1-time lump sum payment based on performance goals
Riverside Transit Agency	DNA	485	N/A	N/A	Mid-Point	Unknown	Performance based
San Joaquin Regional Transit District	200	195	N/A	N/A	Market-Point	Non-Represented - Unknown	Performance based
San Mateo County Transit	592.24 FY 2017	DNA	N/A	N/A	Mid-Point	Unknown	DNA
Santa Barbara Metro Transit District	218	214	DNA	DNA	DNA	Staff 1/1/2019 2% Teamsters 7/1/2018 .054%	DNA
Santa Clara Valley Transportation Authority	2,391	DNA	N/A	N/A	All Others - Mid-Point Executive – Broad Range with flexibility	8/1/2018 - 3%	Performance based

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Table B-2: Retirement Contribution Practices

Agency	Retirement Admin.	Retirement Benefit & Formula			Social Security
Santa Cruz Metro Transit District	CalPERS	Miscellaneous	9.211%	Classic: 2.50% @ 55, One-year FAC PEPRA: 2.00% @ 62, Three-year FAC	Medicare
Alameda Contra Costa Transit District	AC Transit Employees' Retirement	Miscellaneous	13.88% ⁸	Tier 1: 2% @ 55, Five-year FAC Tier 2: 2.25% @ 60, Three-year FAC PEPRA: 2.5% @ 65, Five-year FAC	Medicare/FICA
Central Contra Costa County Transit Authority	CalPERS	Miscellaneous	8.114%	Classic: 2.00% @ 60, Three-year FAC PEPRA: 2.00% @ 62, Three-year FAC	Medicare
City of Santa Cruz <i>Mid-Management Executive</i>	CalPERS	Miscellaneous	9.179%	Tier 1: 2.00% @ 55, One-year FAC Tier 2: 2.00% @ 60, Three-year FAC Tier 3: 2.00% @ 62, Three-year FAC	Medicare
		Employee Pick-up	4.0% 5.0%	All Tiers All Tiers	
County of Santa Cruz	CalPERS	Miscellaneous	8.188%	Tier 1: 2.00% @ 55, Single Year FAC Tier 2: 2.00% @ 60, Three Year FAC Tier 3: 2.00% @ 62, Three Year FAC	Medicare/FICA
Golden Gate Trans District	CalPERS	Miscellaneous	10.271%	Tier 1: 2.50% @ 55, One-year FAC Tier 2: 2.00% @ 60, Three-year FAC Tier 3: 2.00% @ 62, Three-year FAC	Medicare/FICA
Monterey Salinas Transit District	CalPERS	Miscellaneous	8.540%	Classic: 2.00% @ 55, One-Year FAC PEPRA: 2.00% @ 62, Three-year FAC	Medicare
Riverside Transit Agency	CalPERS	Miscellaneous	8.338%	Classic: 2.00% @ 55, Three-year FAC PEPRA: 2.00% @ 62, Three-year FAC	Medicare
San Joaquin Regional Transit District	SJRTD	401a/457	10.00% ⁹	N/A	Medicare/FICA
San Mateo County Transit	CalPERS	Miscellaneous	8.192%	2.0% @ 60, Three-year FAC 2.0% @ 62, Three-year FAC	Medicare/FICA

⁸ 17/18 normal cost rate; 18/19 rate not finalized per agency within 1% difference

⁹ Effective 1/2017 all active non-represented employees not vested as of 1/2017 and employees hired 1/2012 and after, moved to new 401a defined benefit plan with 10% employer contribution; active employees vested prior to 01/2017 receive contribution to 457. CPS HR calculated the 10% contribution to 401a which is in-line with use of PEPRA rates for CalPERS agencies.

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Santa Barbara Metro Transit District	Defined Benefit Plan	401a/457	10.00% ¹⁰	N/A	Medicare/FICA
Santa Clara Valley Transportation Authority <i>All Employee Groups</i>	CalPERS	Miscellaneous	9.331%	Classic: 2.00% @ 55, One-Year FAC PEPRA: 2.00% @ 62, Three-year FAC	Medicare/FICA
		Employee Pick-up	1.0%	Classic	

¹⁰ Effective 1/2017 all active non-represented employees not vested as of 1/2017 and employees hired 1/2012 and after, moved to new 401a defined benefit plan with 10% employer contribution; active employees vested prior to 01/2017 receive contribution to 457. CPS HR calculated the 10% contribution to 401a which is in-line with use of PEPRA rates for CalPERS agencies.

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Table B-3: Deferred Compensation, Longevity Practices, and Education/Certification Reimbursement Practices

Agency	Deferred Compensation (monthly or % of base pay)	Longevity	Education/Certification Reimbursement
Santa Cruz Metro Transit District	457, No agency contribution	Based on years of service: 10+ years: 5.00% 15+ Years: 10.00%	Reimbursement for costs of academic or professional credentials, certifications, or degrees. No maximum.
Alameda Contra Costa Transit District	457, Agency contribution: Represented: \$100/month Unrepresented/At-Will & Executive: \$150/month Roth IRA, No agency Contribution	No policy	\$2,500 annually
Central Contra Costa County Transit Authority	457, No agency contribution	No policy	50% of tuition reimbursement if funds are available
City of Santa Cruz	457, No agency contribution	Based on years of service: Executive; Mid-Management - 10 years; 2.5% increase of base pay Mid-Management - 15 years; 2.0% increase of base pay	Tuition Reimbursement: \$500 per fiscal year
County of Santa Cruz	457, No agency contribution	Executive – 25 years; 3.0% increase to base pay Mid-Mgmt. - 20 years; 3.0% increase to base pay General – 25 years; 3.0% increase to base pay	\$175/year Elected Officials not eligible
Golden Gate Trans District	457 and 401(a), No agency contribution	No policy	DNA
Monterey Salinas Transit District	457 and 401(a), No agency contribution	One-time lump sum payment 1.00% of base salary 5 yr.; 10 yr. and 15 yr. anniversary 20+ yrs. 1% each subsequent anniversary date.	\$3,000 annually
Riverside Transit Agency	457, No agency contribution 401A, Agency contribution of \$25/month	No policy	\$5,000 annually

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Agency	Deferred Compensation (monthly or % of base pay)	Longevity	Education/Certification Reimbursement
San Joaquin Regional Transit District	401a, Agency contribution of 10% in-lieu of retirement	No policy	\$2,500 annually
San Mateo County Transit	DNA	No policy	\$4,000 annually
Santa Barbara Metro Transit District	457, No agency contribution	No policy	N/A
Santa Clara Valley Transportation Authority <i>All employees</i>	All employees: 457, No agency contribution AFSCME & Unrepresented: 401(a), No agency contribution	No Policy	\$2,000 Tuition Reimbursement \$3,500 Professional Development Reimbursement (on matching basis)

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Table B-4 Allowance Pay Practices

Agency	Vehicle* (Other than mileage reimbursement)	Transportation	Phone	Relocation	Bilingual
Santa Cruz Metro Transit District	CEO only – vehicle allowance up to \$400/month	All - transit pass Fixed Route and Paratransit Services - Bus pass for staff and dependents	Discretionary allowance by GM - \$162.50/month	Negotiable allowance by GM up to \$15,000 for expenses and \$5,000 for temporary housing.	No policy
Alameda Contra Costa Transit District	N/A Reimburse for mileage when employee uses personal vehicle	Bus pass for employees and eligible dependents to all service areas	Not provided Provide agency phones	Not to exceed \$10,000 for new hires in the following management groups: Executives (Chiefs and Executive Directors) ▪ Department Directors ▪ Assistant Directors	No policy
Central Contra Costa County Transit Authority	No policy	No policy	No policy	Discretionary	No policy
City of Santa Cruz ¹¹	Executive: \$107/mo.	No policy	Executive: \$70/month	Discretionary	Not eligible
County of Santa Cruz	Executive: Auto allowance abolished in lieu a salary placement equal to \$14.80/day for in county travel. Reimbursed for out-of-county travel.	General – Bus pass for employees	No policy	Maximum of \$10,000 based on actual cost	<i>General:</i> \$1.00-\$1.35/hr. <i>All Others:</i> \$0.50/hr.-\$0.85/hr.

¹¹ City of Santa Cruz: Optional Management Benefit – for recognition of unscheduled and special assignments; receive \$1,300/annually with less than 10 yrs. of service; \$1,500/annually with more than 10 yrs. of service. May receive benefit in direct compensation, deposited to deferred compensation plan or purchase of additional vacation leave in lieu of compensation.

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Agency	Vehicle* (Other than mileage reimbursement)	Transportation	Phone	Relocation	Bilingual
Golden Gate Trans District	DNA	No policy	DNA	DNA	Have policy no amount provided
Monterey Salinas Transit District	<i>Executive: \$400/mo.</i>	Yes	<i>Executive: \$40/mo.</i>	Discretionary-per contract	Dependent on position
Riverside Transit Agency	\$250/month for Director Level	Yes	\$100/month	No policy	No policy
San Joaquin Regional Transit District	N/A for matched classifications	Yes	<i>CFO: \$120/month</i>	No policy	No policy
San Mateo County Transit	Provides agency vehicle based on classification	Employees and dependents are eligible for Bus (SamTrans); employees who work in San Carlos, San Mateo, or San Jose offices for the train (Caltrain).	District provides cell phones as needed	Discretionary reimbursement of up to \$15,000 maximum	No policy
Santa Barbara Metro Transit District	Provides agency vehicle for key staff	No policy	No policy	No policy	DNA
Santa Clara Valley Transportation Authority	No policy	Retirees and eligible dependents are eligible for transit passes	No policy	No policy	SEIU \$170/month AFSCME \$190/month All Unrepresented \$170/month

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Table B-5: Medical, Dental, and Vision Insurance – Employer and Employee Contributions

Rates reflect the most expensive family plan.

Agency	Medical		Dental		Vision	
	Employer	Employee	Employer	Employee	Employer	Employee
Santa Cruz Metro Transportation District	\$2,311.00	\$1,371	\$146.70	\$0.00	\$25.61	\$0.00
Alameda Contra Costa Transit District (Medical: 90% of HMO plan)	\$3,129.29	\$347.71	\$249.96	\$27.78	\$39.60	\$0.00
Central Contra Costa County Transit Authority (Medical: 95% of Kaiser plan)	\$1,678.02	\$1,888.76	189.75	\$0.00	\$0.00	\$29.52
City of Santa Cruz (Medical: 86%-87% highest cost family plan)	<i>Mid-Mgmt.: \$2,010.31 Executive: \$1,980.31</i>	<i>Mid-Mgmt.: \$301.14 Executive: \$331.14</i>	\$126.70	DNA	\$18.74	DNA
County of Santa Cruz (Medical: 95%/90%/90%* Anthem HMO Traditional)	\$2,004.00	\$410.16	**	\$48.00	**	\$17.84
Golden Gate Trans District	\$2,311.45	DNA	DNA	DNA	DNA	DNA
Monterey Salinas Transit District (Medical: 92%/87%/87% all plans)	\$1,937.20	\$289.47	**	\$117.10	**	\$17.42
Riverside Transit Agency (Medical: 100% Employee lowest HMO premium/\$432/month Dependents)	\$1,217.00	\$2,302.91	\$18.16	\$139.49	**	\$13.94
San Joaquin Regional Transit District (Medical: 90% highest cost family plan)	\$1,824.88	\$202.76	\$107.04	\$17.66	\$23.90	\$2.66
San Mateo County Transit	\$3,210.10	\$356.68	\$178.21	\$0.00	\$15.30	\$0.00
Santa Barbara Metro Transit District	\$2,200	DNA	DNA	DNA	DNA	DNA
Santa Clara Valley Transportation Authority (100% of Kaiser Bay Area Family rate)	\$2,027.64 ¹²	\$1,539.14	\$70.34	\$0	\$8.75	\$0

¹² Santa Clara Valley Transportation Authority: Agency contributes \$300 per year to Health Flexible Savings Account

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*If a contribution formula is indicated as %/%/% represents the percentage the order of the levels of coverage are – Employee/Employee +1/Employee +2 or more

**Indicates either the medical premium for family coverage of the benchmark plan exceeds the amount of the agency's total health (medical, dental & vision) contribution or the agency does not provide a contribution for dental and/or vision coverage.

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Table B-6: Life Insurance, Long-Term Disability, Accidental Death & Dismember, and Employee Assistance Program Availability

Agency	Life Insurance	Long-Term Disability	AD&D	EAP
Santa Cruz Metro Transportation District	Employer Paid	Employer Paid	Employer Paid	Employer Paid
Alameda Contra Costa Transit District	Employer Paid	Employer Paid	Employer Paid	Employer Paid
Central Contra Costa County Transit Authority	Employer Paid	Employer Paid	Employer Paid	Employer Paid
City of Santa Cruz	Employer Paid	Employer Paid	N/A	Employer Paid
County of Santa Cruz	Employer Paid	Employer Paid <i>Excludes General Unit</i>	Employer Paid	Employer Paid
Golden Gate Trans District	Employer Paid	Employer Paid	Employer Paid	Employer Paid
Monterey Salinas Transit District ¹³	Employee Paid	Not offered	Yes	Employer Paid
Riverside Transit Agency	Employer Paid	Employer Paid	Employee Paid/Voluntary	Employer Paid
San Joaquin Regional Transit District	Employer Paid	Employer Paid	Employer Paid	Employer Paid
San Mateo County Transit	Employer Paid	Employer Paid	Employer Paid	Employer Paid
Santa Barbara Metro Transit District	Employer Paid	Not offered	DNA	DNA
Santa Clara Valley Transportation Authority	Employer Paid	Executive - Employer Paid	Executive – Employer Paid	Employer Paid

¹³ All benefits offered through Section 125 plan, which maximum benefit only provides partial contribution to medical coverage

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Table B-7: Retiree Health Insurance

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Agency	Retiree Health Insurance
Santa Cruz Metro Transit District	Medical: Employee and eligible dependents, after 5 years' service and age 50 for Classic; or age 62 for PEPRA Dental and Vision: Employee and eligible dependents, after 10 years' service and age 50 for Classic; or age 62 for PEPRA, and until age 65 of Retiree
Alameda Contra Costa Transit District	<i>Represented</i> - Retirees age 55-64; agency contribution - \$691/month; age 65+ agency contribution \$335/month <i>Unrepresented</i> – 55-64 Agency provides retiree dental and vision; 10+ years of service paid retiree medical for lowest medical plan; less than 10 years of service retiree coverage paid at 50% then 10% for each additional year up to 10; dependents may be insured with employee contribution of \$100/month per dependent. Dependents may enroll in vision & dental plans with no agency contribution. Age 65+ employee only \$40/month; retiree and spouse \$80/month.
Central Contra Costa County Transit Authority	Agency contributes maximum of \$607.12/month
City of Santa Cruz	City contributes \$133/month for all employees Mid-Management & Executive with 5 yrs. service additional \$89/month
County of Santa Cruz	Retiree + 1 dependent; Based on years of service; Maximum 20 years and age 55+: Executive, Mid-Management & General: \$133-\$557/month Elected & Appointed Dept. Heads & Assisted Dept. Heads: \$133-\$587/month
Golden Gate Trans District	Agency provides but not detail provided
Monterey Salinas Transit District	Agency contributes minimum amount allowable for the employer portion of cost under retiree elected health plan.
Riverside Transit Agency	Age 50 with 10 or more years of service; contribution up to lowest CalPERS HMO, maximum of \$785/month, employee only retiree medical coverage applicable to Riverside County. No contribution towards medical dependent coverage.
San Joaquin Reginal Transit District	For retirements after 8/1/2010 after age 55 and 25 years of service, the retiree and spouse receive the same medical, dental and vision benefits as current active employees. The retiree pays a fixed dollar amount of the premiums, equal to the same percentage used to calculate the retiree's pension benefit times the active contribution percentage of the premium amount at retirement. The retiree's contribution remains fixed.
San Mateo County Transit	Agency contributes a minimum of \$432.06 to \$1,1238.86 depending on eligibility for Medicare and dependent coverage. All employees must contribute \$23.08 per pay period a Retirement Health Savings plan which upon retirement used to pay for qualified medical expenses of retiree & dependents.
Santa Barbara Metro Transit District	\$285/mo. (reimbursement)

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Santa Clara Valley Transportation Authority	Agency contributes up to the Kaiser Bay area single rate for retirees in California and Kaiser out-of-state single rate for retirees living outside of California. Surviving spouses receive the same benefit.
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Table B-8: Vacation Accrual and Cash-Out Policy

Agency	Year 1		Year 5		Year 10		Year 15		Max Accrual Year		Annual Cash-Out Policy (not upon termination or retirement)
	Annual Accrual	Max Accrual	Annual Accrual	Max Accrual	Annual Accrual	Max Accrual	Annual Accrual	Max Accrual	Annual Accrual	Max Accrual	
Santa Cruz Metro Transit District	88	264	152	456	192	576	192	576	192 @ 10	576	Annual leave accumulated beyond two hundred (200) hours shall upon two (2) weeks advance written request of the employee, be paid to the employee based on the employee's current base hourly rate.
Alameda Contra Costa Transit District											
<i>Represented</i>	80	480	120	480	160	480	200	480	240 @ 25	480	No cash-out
<i>Unrepresented</i>											
<i>At-Will</i>											
<i>Unrepresented Executive</i>	144 ¹⁴	240	216	240	256	240	296	240	336 @25	240	Annually may cash out up to 50% of PTO balances; remaining PTO balance after cash out 80 hrs.
Central Contra Costa County Transit Authority	160	480	200 @ 3	600	240	720	240	720	240 @ 10	720	Annual cash-out of 1/3 accrued balance if use and balance policy met.
City of Santa Cruz ¹⁵	80	160	120	240	160 @ 11	320	160	320	160 @ 15	320	No cash out
County of Santa Cruz											
<i>Vacation – Executive</i>	128	320	168 @ 6	420	208 @ 11	520	248 @ 15	620	248 @ 15	620	No cash-out
<i>Annual Leave – General Unit</i>	176	440	216	540	256	640	296 @ 15	740	296 @ 15	740	
Golden Gate Trans District	DNA	DNA	DNA	DNA	DNA	DNA	DNA	DNA	DNA	DNA	DNA

¹⁴ 1+yrs. up to 5 yrs. 175 hrs

¹⁵ City of Santa Cruz: At 11 years of service, employees accrue 8 hours each year to maximum of 160.

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Agency	Year 1		Year 5		Year 10		Year 15		Max Accrual Year		Annual Cash-Out Policy (not upon termination or retirement)
	Annual Accrual	Max Accrual	Annual Accrual	Max Accrual							
Monterey Salinas Transit District ¹⁶	112	1,040	152	1,040	192	1,040	272	1,040	272@15	1,040	Can cash out 24 hrs. or more provided they have used a minimum of 5 days in the previous year.
Riverside Transit Agency	80	240	120	240	160	240	200	240	240 @ 20	240	No cash-out
San Joaquin Regional Transit District	80	160	120	240	160	320	200	400	240 @ 25	480	No cash-out
San Mateo County Transit ¹⁷	214.50	800	273	1040	273	1040	318.5	1240	344.5 @ 25	1440	Employee may elect to buy back PTO once a year.
Santa Barbara Metro Transit District	80	80	120	120	120	120	120	120	200 @ 20	200	Unused cashed out in January
Santa Clara Valley Transportation Authority ¹⁸											All Employee Groups: A minimum of 40 hours with a remaining balance of at least 80 hours after cash-out.
SEIU	120	360	168	504	184	552	200	600	216 @ 20	648	
AFSCME	136	136	184	504	200	648	216	696	232 @ 20	744	
Executive Management and Non-Represented Management Staff	248	744	248	744	248	744	248	744	248 @ 1	744	

¹⁶ Monterey-Salinas Transit District: provides Personal Leave which covers both vacation and sick leave.

¹⁷ San Mateo County Transit: employees accrue Paid Time Off (PTO)

¹⁸ Santa Clara Valley Transportation Authority: AFSCME, Executive & Unrepresented Management employee groups accrue Scheduled Time Off (STO) which may or may not include sick, management leave etc.

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Table B-9: Sick Leave, Holiday, Administrative, and Personal Leave Policies

Agency	Sick Leave Annual Accrual (Hours)	Sick Leave Maximum Accrual (Hours)	Sick Leave Cash-Out	Holiday	Administrative/Personal Leave
Santa Cruz Metro Transit District	96	Unlimited	Cash-Out upon retirement Annual cash-out of 25% of accrued sick leave above 120 days (960 hours). Annual conversion of sick leave accrued beyond a balance of 96 hours may be converted to annual leave.	Holiday: 7 Floating: 11 ¹⁹	Administrative Leave: 3.5 days (28 hours), increasing to 80 hours in 2019
Alameda Contra Costa Transit District	Year 1 - 64 Year 2+ - 96	140/hrs.	Represented: Annual Cash-Out Excess of 140 hrs. paid at 100% Retirement Cash-Out: 100% of unused balance Unrepresented: Annual Cash-Out Excess of 140 hrs. paid at 50% Retirement Cash-Out: 100% of unused balance Sick Leave Rollover to 457 account: Sick Leave = Cash Out 10 days 2 days 25 days 5 days 50 days 20 days At-Will - Unrepresented & Executive: N/A	All: Holiday: 9 Floating: 3	All: Personal Leave: No policy Management Leave: 5 days/CY, FLSA exempt
At-Will - Unrepresented & Executive	N/A ²⁰	N/A			

¹⁹ Santa Cruz Metro Transit District: Floating Holidays – employees are compensated for any unused time at end of FY and cannot exceed total of 88 hours with Admin leave

²⁰ Alameda Contra Costa Transit District provides Paid Time Off (PTO)

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Agency	Sick Leave Annual Accrual (Hours)	Sick Leave Maximum Accrual (Hours)	Sick Leave Cash-Out	Holiday	Administrative/Personal Leave
Central Contra Costa County Transit Authority	120	Unlimited	Cash-Out upon termination Based on years of service (>2 years-0%; 2-5 years - 25% of balance; 5+ years – 50%)	Holiday: 12 Floating: 6	No policy
City of Santa Cruz <i>Mid-Mgmt. & Executive</i>	96	Unlimited	Sick Leave Incentive Program: Annually, employee may choose to have sick leave accrued hours in excess of 400 hours converted: to receive cash pay-off at the rate of 33% of base pay or convert sick leave to vacation leave at the rate of 33% or bank excess hours to be used in future if needed or cash out at separation. Leave in excess of 400 banked hours upon separation paid at 33% of base pay.	Holiday: 10 Floating: 3	Management Vacation: 80 hours/year Cash out of 20 hours/year 3 days of sick leave to be used as Personal Business Leave
County of Santa Cruz <i>General Unit excluded from Sick Leave & Administrative Leave</i>	48	1,440	Resignation, layoff, or death: Based on years of service & max. of 450 hrs.: 1-5 years-10%; 6-10 yrs.-50% ; 11+ yrs. 75% Retirement: Based on years of service & max. of 600 hrs.: less than 10 years-10%; 10+ yrs.-100%	Holiday: 13 Floating: 0	40 hours for first year and 2+ years - 80 hours
Golden Gate Trans District	DNA	DNA	DNA	Holiday: 11 Floating: 2	DNA
Monterey-Salinas Transit District	N/A ²¹	N/A	N/A	Holiday: 12 Floating: 1	FLSA Exempt employees accrue 64 hours of management leave.
Riverside Transit Agency	96	1,040	Retirement: Converted to service credit Twice Annual Cash-Out: Maximum of 1,040 hrs.	Holiday: 8 Floating: 5	No policy
San Joaquin Regional Transit District	96	2,080	Cash-Out upon termination Cash-Out upon retirement	Holiday: 9 Floating: 3	No policy

²¹ Monterey-Salinas Transit District: provides Annual Leave which covers both vacation and sick leave.

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Agency	Sick Leave Annual Accrual (Hours)	Sick Leave Maximum Accrual (Hours)	Sick Leave Cash-Out	Holiday	Administrative/Personal Leave
San Mateo County Transit	N/A ²²	N/A	N/A	Holiday: 7 Floating: 5	No policy
Santa Barbara Metro Transit District	80	Unlimited	75% at retirement	Holiday: 12 Floating: 2	Personal 40 hours
Santa Clara Valley Transportation Authority	96	Unlimited	No Annual Cash-out Retirement or death: 50% first 480 hours; remaining balance paid off at rate of 12.5%. Option to convert 8 hours for one month of retiree medical single coverage. Other Separation: 10 years of service paid 480 hours at rate of 25% of equivalent cash value; balances beyond 60 days paid off at rate of 12.5%.	Holiday: 12 Floating: 0	No policy
SEIU					
AFSCME	80	Unlimited	Annual Cash-Out 10 years of service, cash-out balances in excess of 320 hours at the rate of 2% for each full year of service, not to exceed 50%. Cash out must be for a minimum of 40 hours. Retirement/Other Separation: Upon retirement, death, or resignation in good standing: With 10 years of service, paid off at the rate of 2% for each year of service (not to exceed 50%), multiplied by the monetary value of such sick leave.	Holiday: 11 Floating: 0	No policy

²² San Mateo County Transit District: provides Paid Time Off (PTO) which covers vacation, sick and other leaves.

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Agency	Sick Leave Annual Accrual (Hours)	Sick Leave Maximum Accrual (Hours)	Sick Leave Cash-Out	Holiday	Administrative/Personal Leave
<i>Executive Management and Unrepresented</i>	64	Unlimited	Executive: No policies Unrepresented: Annual Cash-Out: With 10 years of service, may cash-out balances in excess of 320 hours at the rate of 2% for each full year of service, not to exceed 50%. Cash out must be for a minimum of 40 hours. Retirement/Other Separation: With 10 years of service, paid off at the rate of 2% for each year of service (not to exceed 50%), multiplied by the monetary value of such sick leave.	Holiday: 11 Floating: 0	No policy

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Table B-10: Total Hours of Paid Time Off Annually

All amounts are annual accruals

Agency	Max Sick Leave Accrual Hours	Max Vacation Leave Accrual Hours	Administrative Leave Hours	Personal Leave Hours*	Holiday Hours	Floating Holiday-Hours	Total Hours of Paid Time Off Annually-Hours
Santa Cruz Metro Transit District	96	192	80	0	56	88	512
Alameda Contra Costa Transit District							<i>Unrepresented</i>
<i>Unrepresented</i>	96	240					<i>Represented:</i>
<i>Represented</i>			40	0	72	24	472
<i>At-Will</i>	0	336					<i>At-Will</i>
<i>Unrepresented/Executive</i>							<i>Unrepresented/ Executive:</i>
							472
City of Santa Cruz	96	160	80	0	80	24	440
County of Santa Cruz							
<i>Executive</i>	48	248	80	0	104	0	480
<i>General Unit</i>	0	296	0	0	104	0	400
Central Contra Costa County Transit Authority	120	240	0	0	96	48	504
Golden Gate Trans District	DNA	DNA	DNA	DNA	88	16	DNA
Monterey Salinas Transit District	0	272	64	0	96	8	440
Riverside Transit Agency	96	240	0	0	64	40	440
San Joaquin Regional Transit District	96	240	0	0	72	24	432
San Mateo County Transit	0	344.5	0	0	56	40	440.5
Santa Barbara Metro Transit District	80	200	0	40	60	16	396
Santa Clara Valley Transportation Authority							
<i>SEIU</i>	96	216	0	0	96	0	408

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<i>AFSCME</i>	80	232	0	0	88	0	400
<i>Executive Management and Non-Represented Management Staff</i>	64	248	0	0	88	0	400
Labor Market Median							432
Labor Market Average							442.49
% Above/Below Median							27.03%
% Above/Below Average							25.29%

**Percentages reflect SCMTD's increase in both Personal and Administrative leave to 80 hours each in 2019. In 2018, Personal Leave was 40 hours and Administrative Leave 28 hours resulting in SCMTD leading the market median by 13.60*

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Management Total Compensation Report*

Appendix C: Salary Survey

Attachment A

Santa Cruz Metropolitan Transit District Management Total Compensation Report

Santa Cruz Metro Total Compensation Survey

Introduction

CPS HR Consulting, on behalf of the Santa Cruz Metro is conducting a total compensation survey for 17 job classifications. The City has identified your agency as part of their labor market and would greatly appreciate your assistance in providing base salary and benefit information on the classes surveyed.

A CPS HR Consultant researched your agency's website to conduct an initial job match. This survey tool is prepopulated with information available online, such as: job descriptions, published salary ranges, benefits information, and/or provisions outlined in MOUs. We kindly ask you to help us validate the information *OR* provide accurate information.

Survey Structure

This salary and benefits survey comprises four sections as follows:

Section 1: General Information – Your Agency

The first section asks for general information with respect to your agency's size, salary plan structure, and any scheduled pay increases or decreases.

Section 2: Compensation Survey (separate document)

This section comprises the compensation survey and asks for salary data for the survey class descriptions. A summary description for each survey classification has been provided.

The following pieces of information are needed for each classification.

- Current comparable class title.
- The monthly minimum and maximum salary for the comparable class.
- If you utilize an open range pay structure with a control point, please provide the control or market point for that class.
- What bargaining unit (if represented by a union) the comparable class is assigned to.
- Please include copies of job descriptions, salary schedules, organization charts and a benefit summary if this information is not provided on your agency's website.
- Any additional relevant information on your comparable classification.

Section 3: Benefits Survey

This section asks for premium pay, pension practices, education, health, and leave practices data.

Section 4: Confidential Classification Pay and Benefits Differentials

This section asks for salary and benefits information for confidential classifications.

Completing & Returning the Survey

If you have any questions about the survey or data being requested, please contact [CONSULTANT] by phone at [(###) - ###-####], or email at [EMAIL ADDRESS].

Please send the completed survey and background information by [DATE DESIRED BY COMPLETING CONSULTANT]. **If you are unable to complete by that date, please let us know when you anticipate it would be possible to return or what we can help with.** Please return the survey to [CONSULTANT] by email at [EMAIL ADDRESS].

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Participating Agency Information

Please complete the following information so that we can track responses and follow-up with questions on the survey if necessary.

[Keywords]		
Agency Name		
[]		[]
Contact Name	Title	
[]	[]	[]
Email	Phone	Fax
[]		
Please provide notes (date, time, method of communication with agency contact)		
[]		

General Instructions:

To participate in this study, please follow these instructions:

1. Review class matches and benefits information, especially those highlighted or areas with comments. Please make any corrections or suggestions using the salary and benefit information for your staff positions that match the classifications listed.
2. Please include copies of salary schedules, organization charts and the classification specifications for the comparable classes if this information is not provided on your agency's website.
3. Please send the completed survey and background information by [DATE DESIRED BY COMPLETING CONSULTANT], or at your earliest convenience, by email at [EMAIL ADDRESS].

Thank you in advance for your assistance.

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Section 1: General Information

What is the total number of *employees* within your agency/organization? **Budgeted** **Actual**

Please provide details of your salary plan structure/administration. If your agency utilizes an open range plan, please provide the control point (e.g. mid-point, range maximum, or any other point within the range that is your agency's maximum market value for the classification).

▪ Step plan (indicate number of steps):

▪ Does your Step Plan depend on the classification YES NO

▪ Open range (indicate control point):

Note: For control point we are looking for the point on the range that you look to manage your salaries to. With an open range this is generally the mid-point or market point - the point that you use when comparing your salaries to market.

▪ What is the date/amount of the next cost of living increases or decreases for the matched positions?

Group	Unknown	Date	Increase/Decrease	Amount
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/> Increase <input type="checkbox"/> Decrease	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/> Increase <input type="checkbox"/> Decrease	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/> Increase <input type="checkbox"/> Decrease	<input type="text"/>

▪ Is there a pay policy that advances pay for the organization, and if so, describe below [include description, increase amount, frequency (annually/bi-annually), fixed amount or variable, does it apply to all or specific group/positions]? Longevity and pay incentives are surveyed in the benefits section of the document.

Description	Policy
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

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CPS HR Consulting Staff Quality Control Checklist:

Data Collection by*:	
Data Audited by:	
CompCalc Entry by:	
CompCalc QC by:	

*CPS HR Documents Checklist

- Class Specs (for ALL positions)
- All MOUs, Amendments or Salary Resolutions (for ALL applicable units)
- Salary Schedule(s)
- Financial Budget
- Allocation Documents
- Organizational and/or Departmental Chart(s)
- Benefits Summaries
- Personnel Rules
- Other:

Summary box to allow explanation of why required documents not found

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Section 2: Compensation Survey

Salary Data Collection Sheets – Salaries effective as of 2/1/2018.

- If your agency/organization does not have a comparable, class, please enter “No Comparable Classification” or “NCC” in the “Your Organization Class Title” and list the job title that performs these duties in “If no match, what position performs these duties?”
- If your agency has a comparable class but it is unfilled and not funded in current budget, mark the position as “UNFUNDED”. If available, list which positions are currently doing the unfunded position’s responsibilities.
- For Employee Group, please indicate if Employees are represented or not. If under contract, please indicate and provide contract.
- Employment Status (At-Will/Not At-Will) is required..
- Minimum qualifications are provided for general information. Please do not exclude a class match based on minimum qualifications but do include a note if drastically different.

#	Survey Class Title	Class Description				
1)	Assistant Maintenance Manager	Under direction of the Maintenance Manager, the Assistant Maintenance Manager supervises and coordinates the activities of the bus maintenance and facilities maintenance operation. This position requires knowledge of the operation of the bus maintenance and facilities maintenance operation including the monitoring, controlling, and scheduling of maintenance and facilities staff. This position is distinguished from the Facilities Maintenance Supervisor in that the Assistant Maintenance Manager exercises independent judgment in the performance of a variety of professional, complex and difficult management duties and has overall divisional responsibilities under the direction of the Maintenance Manager and the Chief Operations Officer.				
		Minimum Qualifications/Required Certifications: Two (2) years college level course work from an accredited college in engineering, management, business or public administration, or a closely related field. Four (4) years of progressively responsible professional experience in public transportation vehicle maintenance or heavy vehicle maintenance, including at least two (2) years of responsible supervisory and management experience, preferably in a public agency. A valid Class B State driver license with Passenger Endorsement is required at the time of appointment and must be maintained throughout employment				
	Your Organization Class Title	No Comp/ Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
		<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will

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Required Certifications:				
If no match or unfunded, which position(s) performs these duties?				
Notes:				

#	Survey Class Title	Class Description				
2)	Assistant Operations Manager (Para Transit Department)	<p>Under general direction of the Operations Manager – Paratransit Department, the Assistant Operations Manager – Paratransit Department plans, organizes, and manages delivery of Santa Cruz METRO’s fixed route and ParaCruz service. Ensures Santa Cruz METRO Operations employees meet system performance and customer service standards and comply with related internal policies and procedures, federal and state law. May be assigned to the Fixed Route Division. Performs other duties as assigned. This position is distinguished from the Operations Manager - Paratransit Department in that the Assistant Operations Manager – Paratransit Department exercises independent judgment in the performance of a variety of professional, complex and difficult management duties and has overall departmental responsibilities under the direction of the Operations Manager – Paratransit Department and the Chief Operations Officer.</p> <p>Minimum Qualifications/Required Certifications:</p> <p>Two (2) years college level course work from an accredited college in management, business or public administration, transportation, or a closely related field. Four (4) years of progressively responsible professional experience in transportation administration experience, including at least two (2) years of responsible supervisory and managerial experience, preferably in a public agency. A valid Class B State driver license with passenger Endorsement is required at the time of appointment and must be maintained throughout employment. Required to be able to respond to emergency situations seven days per week, 24 hours per day.</p>				
	Your Organization Class Title	No Comp/ Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
		<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
	Required Certifications:					
	If no match or unfunded, which position(s) performs these duties?					
	Notes:					

#	Survey Class Title	Class Description
3)	Chief Financial Officer (CFO)	Under policy direction from the Chief Executive Officer/General Manager, the Chief Finance Officer plans, develops, organizes, manages, and directs the Agency’s financial activities and functions and administrative policies and procedures. This

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<p>position oversees budgeting, accounts receivable and accounts payable, general ledger, revenue accounting, financial grant administration, insurance administration, general project management, payroll, property management of leases, asset accountability, audits, financial reporting, best practices, efficiency optimization, and complex special projects assigned by the CEO/General Manager. Performs other duties as assigned. The Chief Financial Officer (CFO) is distinguished from the Finance Deputy Director wherein the CFO serves as the department head or director of the Finance Department.</p>					
<p>Minimum Qualifications/Required Certifications:</p> <p>Master's degree from an accredited college in accounting, finance, business administration, public administration, or a closely related field. Eight (8) years professional experience in financial, accounting, budget, or finance and business administration experience, including four (4) years supervisory experience, preferably in a public agency. Desired certifications include: Certified Public Accountant (CPA), Certified Public Finance Officer (CPFO), or Certified Management Accountant (CMA). Experience in a large public organization is preferred.</p>					
Your Organization Class Title	No Comp/Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					
If no match or unfunded, which position(s) performs these duties?					
Notes:					

#	Survey Class Title	Class Description
4)	Chief Operating Officer (COO)	<p>Under policy direction, from the Chief Executive Officer/General Manager, the Chief Operating Officer organizes and directs the operation of Santa Cruz METRO's fixed route and paratransit bus system, the maintenance of both revenue and non-revenue fleet, the maintenance of all Santa Cruz METRO facilities, and contracted security services. Oversees the administration of the departments listed above, including labor relations, risk management, contract administration, safety and training, and budget oversight. Performs other duties as assigned.</p> <p>Minimum Qualifications/Required Certifications:</p> <p>Master's degree from an accredited college in business or public administration, transportation planning, engineering, or a closely related field. Eight (8) years of recent and increasingly responsible professional management experience, with at least five (5) years of experience with a public transit organization working within the operations and/or maintenance department. Experience in a large public organization is preferred.</p>

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Your Organization Class Title	No Comp/ Unfunded?	Min <u>Monthly</u> Salary	Max <u>Monthly</u> Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					
If no match or unfunded, which position(s) performs these duties?					
Notes:					

#	Survey Class Title	Class Description			
5)	Database Administrator (Senior Database Administrator)	<p>Under the direction of the Information Technology and Intelligent Transportation Systems Director (IT Director) the Data Base Administrator (DBA) administrates vendor enterprise software and underlying databases, website content, web server software, website CMS software/database, and provides technical support. The DBA closely coordinates with management, staff and vendors to identify emerging software needs and implement solutions. Duties can include: custom software and database design and development, software updates, responding to support tickets from staff and public, maintaining various export/import scripts, report development, systems integration, performance tuning, development of security and backup strategies, analysis and research, process improvements, technical writing, procedure documentation, and project management. Performs other duties as assigned. While the DBA and the Sr. DBA positions require the same skill set stated in Employment Standards, the DBA position receives daily direct supervision from the Sr. DBA, and formally reports to the IT Manager. Sr. DBA is the Lead in developing a data warehouse, and assists/leads in new software (ERP) scoping, procurement and integration.</p> <p>Minimum Qualifications/Required Certifications: Bachelor's degree from an accredited college or University in computer science, computer engineering, management information systems or closely related field. For promotion to the Senior DBA position, the DBA must have four (4) years of progressively advancing database administration functions. A minimum of two (2) years of experience at Santa Cruz METRO is highly desirable.</p>			
Your Organization Class Title	No Comp/ Unfunded?	Min <u>Monthly</u> Salary	Max <u>Monthly</u> Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					

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If no match or unfunded, which position(s) performs these duties?	
Notes:	

#	Survey Class Title	Class Description				
6)	Executive Assistant	<p>Under minimal direction, an Executive Assistant performs a variety of administrative support functions related to overseeing the activities and operations of Santa Cruz METRO's Administrative Department; serves as recording secretary to the Board of Directors; communicates with governmental agencies, attorneys, community groups and others to exchange information, schedule meetings and coordinate activities; acts as a liaison between the CEO/GM and the Board, other employees, and outside agencies; acts as a representative for Santa Cruz METRO at various internal and public functions; supervises, assigns, monitors and evaluates the work of the departmental clerical staff. Performs other duties as assigned. Incumbents in this class are distinguished from other administrative support by the primary responsibility of administrative support to the CEO/General Manager and Board of Directors. Work involves the highest degree of confidentiality, independent judgment and knowledge of organizational-wide, governmental policies and procedures.</p> <p>Minimum Qualifications/Required Certifications: Any combination of training and experience equivalent to five (5) years' responsible executive reporting level administrative experience. A four-year undergraduate degree preferred. Two (2) years of experience supervising administrative/clerical personnel.</p>				
	Your Organization Class Title	No Comp/Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
		<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
	Required Certifications:					
	If no match or unfunded, which position(s) performs these duties?					
	Notes:					

#	Survey Class Title	Class Description
7)	Finance Deputy Director	Under direction of the Chief Financial Officer (CFO), the Finance Deputy Director is responsible for planning, organizing, administering, and coordinating various financial activities, including accounting, budgets, audits and financial reporting, payroll, grants, and insurance; conducting research and analysis for management

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<p>programs and projects; supervising assigned staff. Performs duties as assigned. The Finance Deputy Director is the second in command, responsible for the daily operations within the Finance Department; exercises general direction over the accounting staff.</p>					
<p>Minimum Qualifications/Required Certifications:</p> <p>Bachelor's degree from an accredited college in accounting, finance, or a closely related field. Six (6) years professional experience in financial, accounting, budget, finance and business administration, including two (2) years supervisory experience, preferably in a public agency. Familiarity with transit agency or transportation system activities and functions is highly desirable. Desired certifications include: Certified Public Accountant (CPA), Certified Public Finance Officer (CPFO), or Certified Management Accountant (CMA).</p>					
Your Organization Class Title	No Comp/Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					
If no match or unfunded, which position(s) performs these duties?					
Notes:					

#	Survey Class Title	Class Description			
8)	Human Resources Deputy Director	<p>Under general direction, assists the Human Resources Director in planning, managing, coordinating and overseeing assigned Human Resources operations, activities, programs, and personnel for Santa Cruz METRO. This is a second in command, responsible for the daily operations for an assigned area within the Human Resources Department. Exercises general direction over professional, para-professional, and clerical staff. Performs other duties as assigned.</p>			
		<p>Minimum Qualifications/Required Certifications:</p>			
Your Organization Class Title	No Comp/Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:		<p>Education: Equivalent to a Bachelor's degree from an accredited college or university with major study in business or public administration or a closely related field. Five (5) years professional experience in human resources, business or public</p>			

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	administration experience, including two (2) years supervisory experience, preferably in a public agency.
If no match or unfunded, which position(s) performs these duties?	
Notes:	

#	Survey Class Title	Class Description				
9)	Human Resources Director	<p>Under general direction of the Chief Executive Officer/General Manager, the Human Resources Director plans, organizes, directs, and coordinates the human resources programs with primary responsibility for all personnel, compliance, and human resources-related initiatives that support organizational strategic goals. These programs include equal employment opportunity/affirmative action, recruitment and examination, classification and compensation, employee and labor relations, employee insurance and benefit programs, employee training, Human Resources Information Systems (HRIS), drug and alcohol compliance, and workers compensation. Performs other duties as assigned. This is the executive level classification in the Human Resources professional series.</p> <p>Minimum Qualifications/Required Certifications: Bachelor's degree from an accredited college in human resources, business or public administration, or a closely related field. Eight (8) years professional experience in human resources, business or public administration experience, including four (4) years supervisory experience, preferably in a public agency.</p>				
	Your Organization Class Title	No Comp/ Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
		<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
	Required Certifications:					
	If no match or unfunded, which position(s) performs these duties?					
	Notes:					

#	Survey Class Title	Class Description
10)	Information Technology & Intelligent Trans Systems Director	Under direction from the CEO/GM, the Information Technology and Intelligent Transportation Systems Director plans, organizes, directs, and participates in the programs and activities of the IT Department, including upgrades, repair, and maintenance of IT systems, including servers, applications, and databases. The Chief Information Technology and Intelligent Transportation Systems Officer is responsible for leading the agency and the IT Department in the overall investment in and deployment of information technology, consistent with a broad, enterprise-wide definition of information technology. Oversees and

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<p>directs all activities of the Information Technology and Transportation Intelligence Division, including day-to-day technical operations, short- and long-range, strategic planning, budgeting and project management.</p> <p>Minimum Qualifications/Required Certifications: Bachelor's degree from an accredited college or University in computer science, mathematics, public, or business administration or closely related field, supplemented by coursework in information technology related studies if not computer science degree. Eight (8) years professional level experience in related computer fields and management, which should include system administration, computer programming and technical administration, including two (2) years supervision. Public Agency experience preferred.</p>					
Your Organization Class Title		Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					
If no match or unfunded, which position(s) performs these duties?					
Notes:					

#	Survey Class Title	Class Description
11)	Maintenance Manager	<p>Under the direction of the Chief Operating Officer (COO), the Maintenance Manager plans, organizes, supervises, directs, and monitors the programs and activities of the fleet and facilities maintenance programs and a centralized warehouse. This would include: installation, construction, repair, and cleaning functions for all Santa Cruz METRO facilities, including bus stops, the repair, maintenance and servicing of the Santa Cruz METRO's vehicles and other operating equipment. Responsible for the management and supervision of the fleet and facility maintenance programs and a centralized warehouse, to ensure the fleet remains in a state of good repair Performs other duties as assigned.</p> <p>Minimum Qualifications/Required Certifications: Bachelor's degree from an accredited college in engineering, business administration, or a closely related field. Eight (8) years of progressively responsible professional experience in public transportation vehicle maintenance or heavy vehicle maintenance, including at least four (4) years of responsible supervisory and management experience, preferably in a public agency. A valid Class C State driver license is required at the time of appointment and must be maintained throughout employment.</p>

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Your Organization Class Title	No Comp/ Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					
If no match or unfunded, which position(s) performs these duties?					
Notes:					

#	Survey Class Title	Class Description			
12)	Marketing, Communications & Customer Service Director	<p>Under the direction of the CEO/General Manager, the Marketing, Communications and Customer Service Director plans, organizes, directs, develops and coordinates business development, marketing activities, branding and rebranding, acts as Santa Cruz METRO's primary media spokesperson, creates press releases, develops and oversees community outreach events/projects, oversees the content of the Santa Cruz METRO web site and social media, oversees the customer service interfaces of the agency including fare media and fare media distribution, manages the customer complaint process and is responsible for timely and responsive responses, develops, analyzes, and oversees all customer surveys, develops and oversees all aspects of the advertising program, both revenue generating and agency promotion, and develops annual business development and marketing plans that include ridership growth targets. Performs other duties as assigned. The Marketing, Communications, and Customer Service Director serves as the Department Head and is responsible for all department functions.</p> <p>Minimum Qualifications/Required Certifications: Bachelor's degree from an accredited college in public relations, marketing, business, with an emphasis/minor in Marketing, or a closely related field. Five (5) years professional experience the public or private sector working in marketing or communications, including two (2) years supervisory experience, preferably in a public agency. Familiarity with transit agency or transportation system activities and functions is highly desirable. Experience in a large public organization is preferred.</p>			
Your Organization Class Title	No Comp/ Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					
If no match or unfunded, which position(s) performs these duties?					

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Notes:	
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#	Survey Class Title	Class Description			
13)	Operations Manager- Fixed Route Division	<p>Under general direction of the Chief Operating Officer (COO), the Operations Manager – Fixed Route Division directs and coordinates the activities of the bus transportation operation base, and directs and supervises the bus driver supervisors. May be assigned to the Paratransit Division. Perform other duties as assigned. The Operations Manager – Fixed Route Division is distinguished from Operations Supervisors wherein the Operations Manager oversees the daily operations of the Fixed Route Division under the direct authority of the COO.</p> <p>Minimum Qualifications/Required Certifications:</p>			
Your Organization Class Title	No Comp/ Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					
If no match or unfunded, which position(s) performs these duties?					
Notes:					

#	Survey Class Title	Class Description			
14)	Operations Manager- Paratransit Division	<p>Under general direction of the Chief Operating Officer (COO), the Operations Manager - Paratransit Division directs and coordinates the activities of the bus transportation operation base, and directs and supervises the bus driver supervisors. May be assigned to the Fixed Route Division. Performs other duties as assigned. The Operations Manager – Paratransit Division is distinguished from Operations Supervisors wherein the Operations Manager oversees the daily operations of the Paratransit Division under the direct authority of the COO.</p> <p>Minimum Qualifications/Required Certifications:</p> <p>Bachelor’s degree from an accredited college in business or public administration, transportation, or a closely related field. Four (4) years professional experience in business or public administration, transportation administration experience, including two (2) years managerial experience, preferably in a public agency.</p>			
Your Organization Class Title	No Comp/ Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					

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If no match or unfunded, which position(s) performs these duties?	
Notes:	

#	Survey Class Title	Class Description				
15)	Planning & Development Director	<p>Under the direction of the CEO/General Manager, the Planning and Development Director plans, develops, organizes, and directs three distinct Santa Cruz METRO functions: (1) planning and scheduling of route and service development; (2) overseeing grant research, review, preparation, and administration for capital and operations funding; and (3) governmental affairs (working with local, state, and federal representatives and legislative advocates to develop and support legislation beneficial to Santa Cruz METRO and the region). Performs other duties as assigned. The incumbent may serve as the governmental affairs advocate. The incumbent also functions as a member of Santa Cruz METRO's senior leadership team and participates actively in addressing issues of concern to the Department and the organization.</p> <p>Minimum Qualifications/Required Certifications: Bachelor's degree from an accredited college in business, political science, public administration, geography, transportation planning, engineering, or a closely related field. Eight (8) years professional experience in business management, public administration, transportation planning, grants administration, route and service planning and development, organizing and facilitating public outreach, and government affairs, including two (2) years supervisory experience, preferably in a public agency. Familiarity with transit agency or transportation system activities and functions is highly desirable.</p>				
	Your Organization Class Title	No Comp/Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
		<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
	Required Certifications:					
	If no match or unfunded, which position(s) performs these duties?					
	Notes:					

#	Survey Class Title	Class Description
16)	Purchasing & Special Projects Director	<p>Under the direction of the CEO/General Manager, the Purchasing and Special Projects Director plans, organizes, directs, develops and coordinates the activities of the Purchasing and Parts department. Ensures compliance with applicable Federal, State, and local laws and regulations. Performs complex procurement activities; is responsible for all purchasing, contracting, and materials management at Santa Cruz METRO. Serves as the project coordinator and/or manager over special projects as assigned. Supervises staff directly and indirectly. Performs other duties as assigned.</p>

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<p>Minimum Qualifications/Required Certifications: Bachelor's degree from an accredited college in business, public administration, mathematics, or a closely related field, as well as completion of the NTI/FTA Procurement Training series, or the ability to complete the series within 12 months of hire. Four (4) years professional experience in public or private sector procurement, including two (2) years supervisory experience, preferably in a public agency. Familiarity with transit agency or transportation system activities and functions is highly desirable.</p>					
Your Organization Class Title	No Comp/Unfunded?	Min Monthly Salary	Max Monthly Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					
If no match or unfunded, which position(s) performs these duties?					
Notes:					

#	Survey Class Title	Class Description
17)	Safety, Security & Risk Management Director	<p>Under the direction of the CEO/General Manager, the Safety, Security, and Risk Director is responsible for management and oversight of the Risk Department and its functions. This position plans, organizes, implements, and administers occupational, environmental, and industrial safety programs, security and risk management programs, processes, policies and procedures; oversees security and emergency preparedness functions; enforces Santa Cruz METRO rules and regulations at Santa Cruz METRO facilities and fleet; conducts system safety, security, and risk assessments; coordinates security and emergency response protocols; and provides reports and updates to CEO and/or District Counsel regarding safety, security and risk management related issues. Performs other duties as assigned.</p> <p>Minimum Qualifications/Required Certifications: Bachelor's degree from an accredited college in Business, Public Administration, Environmental or Occupational Health and/or Safety, Criminal Justice, or a closely related field. Four (4) years professional experience in a safety role preferable within a transportation agency including two (2) years supervisory experience, preferably in a public agency.</p>

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Your Organization Class Title	No Comp/ Unfunded?	Min <u>Monthly</u> Salary	Max <u>Monthly</u> Salary	Employee Group/Union	Employment Status
	<input type="checkbox"/> NCC <input type="checkbox"/> Unfunded <input type="checkbox"/> Contract/No Benefits				<input type="checkbox"/> At-Will <input type="checkbox"/> Not At-Will
Required Certifications:					
If no match or unfunded, which position(s) performs these duties?					
Notes:					

Attachment A

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Section 3: Benefits Survey

- This is a survey of your employee benefits and employer premium costs effective **2/1/2018**.
- For health and dental insurance, please enter the **most expensive selected benefit plan and/or employer premium cost for full family coverage (Employee +2)**.
- If employees do not receive a specific benefit, please enter "N/A" for Not Applicable in the appropriate columns.
- Please report all premiums as a **monthly** employer cost.
 - To convert from bi-weekly to monthly: (Bi-Weekly Rate * 26) ÷ 12

Bargaining Units Defined

- Please do not use generic titles such as 001, or titles that are not descriptive of the units represented.
- Please make sure the titles match those used in the salary portion of this survey.
- If benefits for more than one agency are identical, please record as one Bargaining Unit and include in notes which specific units are being grouped together.

Retirement Program and Practices

Social Security	[UNIT 1 TITLE]	[UNIT 2 TITLE]	[UNIT 3 TITLE]
Does your agency participate in Social Security? If so, which rate? Medicare = 1.45% FICA = 6.20% Both = 7.65%	<input type="checkbox"/> Medicare & FICA <input type="checkbox"/> Medicare Only <input type="checkbox"/> Do not participate (indicate substitute in notes)	<input type="checkbox"/> Medicare & FICA <input type="checkbox"/> Medicare Only <input type="checkbox"/> Do not participate (indicate substitute in notes)	<input type="checkbox"/> Medicare & FICA <input type="checkbox"/> Medicare Only <input type="checkbox"/> Do not participate (indicate substitute in notes)
Notes			

Retirement Plan Contribution	[UNIT 1 TITLE]	[UNIT 2 TITLE]	[UNIT 3 TITLE]
Please list the type of pension plan your agency participates in, e.g. PERS, etc.	<input type="checkbox"/> CalPers <input type="checkbox"/> 37 Act <input type="checkbox"/> Other	<input type="checkbox"/> CalPers <input type="checkbox"/> 37 Act <input type="checkbox"/> Other	<input type="checkbox"/> CalPers <input type="checkbox"/> 37 Act <input type="checkbox"/> Other
What is the actuarially determined Employer contribution (not including employee contributions paid by employer) as a percentage (%) of base salary? (Straight from PERS, not actuarial)			
Is there a reverse pickup (employee pickup)? If yes, percentage:			
Employer – Employee Amount:			
What is the retirement formula (e.g. 2% @ 55, etc. based on Highest 3 Year Average)?			
Is there a vesting period for retirement benefits? If yes, please indicate what the vesting period is.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, vesting period:			
Notes:			

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Deferred Compensation Practices	[UNIT 1 TITLE]	[UNIT 2 TITLE]	[UNIT 3 TITLE]
Does the agency provide a Deferred Compensation plan? <input type="checkbox"/> 457 <input type="checkbox"/> 401(a) <input type="checkbox"/> None <input type="checkbox"/> Other If no box is marked, it will be assumed NO . If no, move to next section. If yes, complete remainder of table.		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the employer contribute to the plan? If no, move to next section. If yes, complete remainder of table.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, is this a matching contribution?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Agency does not contribute	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Agency does not contribute	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Agency does not contribute
What is the maximum Employer contribution (enter as dollars or percentage of <u>base monthly</u> salary) and general policy?			
Notes			

Longevity Pay Practices	[UNIT 1 TITLE]	[UNIT 2 TITLE]	[UNIT 3 TITLE]
Does the employer have a longevity pay practice? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, move to next section. If yes, complete remainder of table.		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Enter the <u>amount paid per month</u> , in dollars, or as a percentage of monthly salary, for premium pay based on length of service. Enter each level of longevity pay including the year of service and corresponding premium pay amount.			
Is this a single lump sum payment? <input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Notes			

Incentive	[UNIT 1 TITLE]	[UNIT 2 TITLE]	[UNIT 3 TITLE]
Education/Certification Reimbursement			
Enter the maximum amount paid annually, in dollars, for cost of tuition and books . Put "N/A" if this benefit is not provided.			

Special Pay Practices

See separate document.

Please provide details on Allowance Pay and Bonus Pay or Performance Incentives Practices for solely for the positions listed. **NOTE THAT ALLOWANCE PAY WILL BE APPLIED TO ALL POSITIONS LISTED WITH THE UNIT TITLE**

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INDICATED SALARY SURVEY SECTION. IF NOT ALL EMPLOYEES WITHIN THE UNIT RECEIVE THE BENEFIT, INDICATE WHICH DO.

- Vehicle
- Transportation (transit pass, etc.)
- Phone
- Relocation
- Professional Development (Educational Reimbursement)
- Other

Health Programs

*Specifics on Life Insurance and LTD will be collected below non-Cafeteria plan medical.

Medical Plan Practices	[Bargaining Unit 1 Title]	[Bargaining Unit 2 Title]	[Bargaining Unit 3 Title]
Cafeteria Plan Practices			
Does the agency have a cafeteria plan provision? <i>If no, move to the non-cafeteria plan table below. Skip to non-cafeteria.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Cafeteria Plan Monthly Employer Flex Amount: <i>(not benefits amounts)</i>			
What benefit items is this payment intended to cover? <i>(i.e., medical, dental, etc.)</i>	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision <input type="checkbox"/> Short Term Disability <input type="checkbox"/> Long Term Disability* <input type="checkbox"/> Life Insurance* <input type="checkbox"/> Other (list below)	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision <input type="checkbox"/> Short Term Disability <input type="checkbox"/> Long Term Disability* <input type="checkbox"/> Life Insurance* <input type="checkbox"/> Other (list below)	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision <input type="checkbox"/> Short Term Disability <input type="checkbox"/> Long Term Disability* <input type="checkbox"/> Life Insurance* <input type="checkbox"/> Other (list below)
Non-Cafeteria			
What is the employer's maximum monthly contribution, in dollars, for full family medical coverage, for medical, dental, and vision?			
Medical			
Employer			
Employee			
Dental	<input type="checkbox"/> Yes, and employer contributes <input type="checkbox"/> Yes, but employer does not contribute <input type="checkbox"/> Yes, but covered in Medical <input type="checkbox"/> No plan provided	<input type="checkbox"/> Yes, and employer contributes <input type="checkbox"/> Yes, but employer does not contribute <input type="checkbox"/> Yes, but covered in Medical <input type="checkbox"/> No plan provided	<input type="checkbox"/> Yes, and employer contributes <input type="checkbox"/> Yes, but employer does not contribute <input type="checkbox"/> Yes, but covered in Medical <input type="checkbox"/> No plan provided
Employer			
Employee			
Vision	<input type="checkbox"/> Yes, and employer contributes <input type="checkbox"/> Yes, but employer does not contribute <input type="checkbox"/> Yes, but covered in Medical <input type="checkbox"/> No plan provided	<input type="checkbox"/> Yes, and employer contributes <input type="checkbox"/> Yes, but employer does not contribute <input type="checkbox"/> Yes, but covered in Medical <input type="checkbox"/> No plan provided	<input type="checkbox"/> Yes, and employer contributes <input type="checkbox"/> Yes, but employer does not contribute <input type="checkbox"/> Yes, but covered in Medical <input type="checkbox"/> No plan provided
Employer			
Employee			
Other benefits:			
Retiree Health Insurance	[Bargaining Unit 1 Title]	[Bargaining Unit 2 Title]	[Bargaining Unit 3 Title]
Does this agency offer health insurance for retirees?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Describe policy and amounts if available.			

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Life Insurance & Disability	[Bargaining Unit 1 Title]	[Bargaining Unit 2 Title]	[Bargaining Unit 3 Title]
Life Insurance is:	<input type="checkbox"/> Covered in Cafeteria Plan <input type="checkbox"/> Employer Paid, Non-Cafeteria Plan <input type="checkbox"/> Offered, but not Employer Paid <input type="checkbox"/> Not Offered	<input type="checkbox"/> Covered in Cafeteria Plan <input type="checkbox"/> Employer Paid, Non-Cafeteria Plan <input type="checkbox"/> Offered, but not Employer Paid <input type="checkbox"/> Not Offered	<input type="checkbox"/> Covered in Cafeteria Plan <input type="checkbox"/> Employer Paid, Non-Cafeteria Plan <input type="checkbox"/> Offered, but not Employer Paid <input type="checkbox"/> Not Offered
Long Term Disability is:	<input type="checkbox"/> Covered in Cafeteria Plan <input type="checkbox"/> Employer Paid, Non-Cafeteria Plan <input type="checkbox"/> Offered, but not Employer Paid <input type="checkbox"/> Not Offered <input type="checkbox"/> Data Not Available/Found	<input type="checkbox"/> Covered in Cafeteria Plan <input type="checkbox"/> Employer Paid, Non-Cafeteria Plan <input type="checkbox"/> Offered, but not Employer Paid <input type="checkbox"/> Not Offered <input type="checkbox"/> Data Not Available/Found	<input type="checkbox"/> Covered in Cafeteria Plan <input type="checkbox"/> Employer Paid, Non-Cafeteria Plan <input type="checkbox"/> Offered, but not Employer Paid <input type="checkbox"/> Not Offered <input type="checkbox"/> Data Not Available/Found

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Vacation and Sick Leave Practices

Incentive	[Bargaining Unit 1 Title]	[Bargaining Unit 2 Title]	[Bargaining Unit 3 Title]
Vacation Leave			
List the number of hours accrued annually as well as the maximum that can be accrued annually:	Annual Accrual	Max. Accrual	Annual Accrual
Year 1			
Year 5			
Year 10			
Year 20			
Year of service for max accrual:			
Can employees cash out vacation leave on an annual basis? (Excludes termination or retirement).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, what is the policy?			
Sick Leave			
	Annual Accrual	Max. Accrual	Annual Accrual
List the number of hours per year, as well as the maximum accrual allowed.			
Can employees cash out sick leave at termination or retirement, and/or apply to service upon retirement?	<input type="checkbox"/> No <input type="checkbox"/> Cash-Out upon termination <input type="checkbox"/> Cash-Out upon retirement <input type="checkbox"/> Service credit upon retirement	<input type="checkbox"/> No <input type="checkbox"/> Cash-Out upon termination <input type="checkbox"/> Cash-Out upon retirement <input type="checkbox"/> Service credit upon retirement	<input type="checkbox"/> No <input type="checkbox"/> Cash-Out upon termination <input type="checkbox"/> Cash-Out upon retirement <input type="checkbox"/> Service credit upon retirement
If yes, what is the policy?			
Holidays			
Number of <u>regular</u> holidays (days)			
Number of Floating holidays (days)			
Personal Leave			
List the number of personal days provided each year.			
Admin Leave			
Is Administrative or other leave provided?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Administrative Leave policies:			

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Appendix D: Operations Manager – Paratransit Division Updated Job Description

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

Class Code: 3125-PP21

FLSA Status: Exempt

Operations Manager – Paratransit Division Bargaining Unit: Management

DEFINITION:

Under general direction of the Chief Operating Officer (COO), the Operations Manager - Paratransit Division plans, organizes, directs and manages the activities of the bus transportation operation base; directs and supervises bus driver supervisors; ensures that Paratransit operations comply with applicable laws, regulations, policies and procedures; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

The Operations Manager – Paratransit Division is distinguished from lower level bus driver supervisors because the Operations Manager oversees the daily operations of the Paratransit Division under the direct authority of the COO. The Operations Manager – Paratransit Division may assist with Fixed Route operations as needed.

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.

- Supervises subordinate personnel, including subordinate supervisors; selects and trains staff; evaluates employee attendance, performance and other issues; facilitates the resolution of employee concerns and grievances; interprets labor contract provisions to supervisors and/or staff.
- Reviews and approves disciplinary actions, reports and data recommended or prepared by supervisory personnel; reviews and approves accident reports.
- Ensures and maintains high staff and operational performance and conformance with Federal, State, and Local laws and regulations, as well as Santa Cruz METRO rules and regulations, including the Drug and Alcohol Testing Policy and applicable provisions of labor contracts and agreements.
- Communicates with employees in the field to provide advice and assistance on how to handle difficult, sensitive, or potentially dangerous situations as they arise.
- Serves as first level hearing officer for disciplinary hearing.
- Develops documentation to support performance of ADA complementary paratransit service in compliance with the Department of Transportation regulations implementing the Americans with Disabilities Act of 1990 (ADA).
- Develops documentation to support ADA complementary paratransit eligibility determination process in compliance with the Department of Transportation regulations implementing the ADA.
- Develops reporting standards that are comparable within the transit industry and are meaningful measures of performance.
- Prepares Request for Proposals for contractors to perform ADA complementary paratransit operations, monitoring, maintenance, and reporting.
- Participates in the evaluation of bids and awards contracts in conjunction with Senior Management for ADA complementary service provision and eligibility determination process.

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- Monitors performance of contractors based on contractual requirements and policy changes made from time to time.
- Manages the collection, review, and analysis of data used for program evaluation.
- Develops and monitors the Santa Cruz METRO budget for paratransit programs; reconciles funds received through the sale fare media.
- Monitors submitted contractor invoices for accuracy and to ensure listed services were actually provided.
- Develops demand projections and updates these projections as needed for planning and budgeting purposes. Prepares technical reports.
- Participates in the hiring process for, and supervision of assigned staff.
- Meets regularly with citizen advisory groups to present system performance, listen to comments, and address policy issues.
- Meets with management regularly to discuss performance issues, and develop approaches to addressing problems as they arise.
- Presents paratransit performance data, issues, policy change recommendations, and other information to the Board of Directors.
- Develops and manages the appeals process for program eligibility decisions and service policy decisions affecting the services received by customers.
- Reviews training programs and makes recommendations in the areas of sensitivity to the disabled community.
- May coordinate special bus services with outside agencies.
- Performs short and midterm planning for department including forecasting manpower.
- Attends meetings as assigned; may represent the Agency in court appearances as necessary.
- May assist in preparation of labor contract negotiations.
- Establishes outreach programs promoting the paratransit program and resources.
- Collects and analyzes data and develops comprehensive reports that comply with Federal and State reporting requirements.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- US Department of Transportation regulations implementing the public transit provisions of the Americans with Disabilities Act of 1990 (49CFR Parts 37 and 38).
- Working knowledge of the ADA in the broader context of public accommodations and employment requirements.
- Federal, state and local laws and regulations pertaining to transit operations.
- Principles and practices of transit bus operations.
- Principles and practices of bus operator scheduling.
- Knowledge of contract management practices in a transit setting.
- Office software packages (such as Microsoft Office).
- Paratransit scheduling and reporting software in use in the industry (such as Trapeze PASS).
- Budgeting practices and procedures.
- Familiarity of grievance procedures and working in a unionized environment.
- Knowledge of the principles and practices of supervision and training.

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Ability to:

- Work independently.
- Effectively motivate, train, and evaluate the performance of staff.
- Prepare and present both oral and written comprehensive and concise reports and recommendations.
- Interpret and apply laws, regulations, policies, and procedures.
- Plan and coordinate the implementation of new procedures and projects.
- Operate an office computer including word processing and applicable software.
- Establish and maintain effective working relationship with employees, union officials, and the public.
- Monitor budgets and expenses to ensure fiscal accountability.
- Analyze data and format the results into comprehensive reports.
- Read, interpret, and apply legal and technical information.

MINIMUM QUALIFICATIONS:

Education, Training and Experience:

Bachelor's degree from an accredited college in business or public administration, transportation, or a closely related field.

AND

Four (4) years professional experience in business or public administration, transportation administration experience, including two (2) years managerial experience, preferably in a public agency.

Experience in the following areas is preferable:

- Experience managing an ADA complementary paratransit operation service, either publicly operated or privately operated.
- Experience managing contracts in a public transit setting.
- Experience interacting with the public, boards, and advisory committees.
- Experience developing and managing a budget for operation of a relevant service or program.
- Training in paratransit management, passenger assistance techniques, paratransit scheduling software, and management.

Familiarity with transit agency or transportation system activities and functions is highly desirable. Experience in a large public organization is preferred.

LICENSES AND CERTIFICATES:

A valid Class B driver license with passenger Endorsement and safe driving record is required at the time of application. A valid Class B State driver license with passenger Endorsement is required at the time of appointment and must be maintained throughout employment.

SPECIAL REQUIREMENTS:

- Required to be able to respond to emergency situations seven days per week, 24 hours per day.
- Must maintain strictest confidentiality.

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Must participate in professional development activities.
- Requires occasional travel.

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 regularly required to sit, walk and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional standing, walking, overhead reaching and lifting up to 20 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in an office environment where the noise level is usually quiet. May work out in the field when needed. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

Must pass requisite background check.

- *Adopted: November 2017
- *BOD Approved: 00-00-00
- *Revised: 00-00-00
- *Job Family: Professional – Operations Paratransit

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Attachment B

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code:
FLSA Status: Exempt

Facilities Maintenance Manager **Bargaining Unit: Management**

DEFINITION:

Under the direction of the Chief Operating Officer (COO), the Facilities Maintenance Manager plans, organizes, supervises, directs, and monitors the programs and activities of the facilities maintenance programs, including a centralized warehouse, in conformance with Santa Cruz METRO's vision, mission, goals and objectives; manages staff and operations responsible for installation, construction, repair, and cleaning functions for all Santa Cruz METRO facilities, including bus stops, buildings, and related operating equipment; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

The Facilities Maintenance Manager reports to the Chief Operating Officer and is responsible for the management and supervision of the facility maintenance programs to ensure that Santa Cruz METRO facilities are clean and in a state of good repair.

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.

- Plans, organizes, and directs staff in the maintenance and repair of Santa Cruz METRO owned bus stops, buildings and other Santa Cruz METRO facilities and related equipment.
- Plans, organizes, and directs the work of Custodial Service Workers, Facilities Maintenance Workers, and other Santa Cruz METRO employees and supervisory staff involved in facility maintenance; selects, supervises, trains, motivates, assigns, evaluates, counsels and disciplines staff, primarily through subordinate supervisors.
- Coordinates the development and implementation of training programs for supervisors and employees; monitors and evaluates the department's performance against OSHA standards and Santa Cruz METRO's safety program.
- Reviews State and Federal laws, regulations and proposed legislation pertaining to areas of responsibility and reports on impact; ensures the application of safety rules and regulations.
- Reviews and evaluates facility inspections for quality assurance purposes; reviews overall performance of the department and recommends long-term improvements.
- Performs compliance reporting.
- Assists in the development and implementation of maintenance policies and programs.
- Develops and reviews work plans to ensure preventive maintenance and repairs; prepares and reviews maintenance schedules; ensures appropriate record keeping.
- Develops, implements, manages and monitors contracts and service agreements with vendors, contractors, and consultants.
- Plans and implements short and long-range projects dealing with facility acquisitions, rejuvenation, and maintenance; develops cost estimates of labor, time, costs, and materials associated with projects and repairs; prepares construction, renovation, and purchasing



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

contract specifications; inspects contracted work for conformance to standards; reviews and approves requisitions for equipment, parts, materials, and supplies.

- Oversees and participates in the development and administration of the department budget; develops, monitors, and manages the budget items related to facilities maintenance.
- Plans and directs purchasing actions to ensure timely availability of the materials, services, and equipment needed to support maintenance and facility operations and programs.
- Reviews building developments for transit improvements during the environmental review process to ensure compliance with model ordinance.
- Makes presentations to the Santa Cruz METRO Board of Directors, other boards and commissions, agencies, employee organizations, and public and private organizations; represents Santa Cruz METRO at various meetings.
- Analyzes and evaluates complex problems; recommends and implements effective solutions.
- Directs and reviews inventory control activities.
- Interprets and applies the provisions of labor agreements in accordance with Santa Cruz METRO guidelines; may serve as a hearing officer.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of public transportation maintenance organization and operations, including applicable safety procedures and requirements.
- Building construction and repair, electrical, and/or mechanical trades, and related tools and equipment.
- Janitorial services operations.
- Applicable local, State, and Federal codes and regulations governing transit-related construction and facility maintenance.
- Standard job sequences used in building construction.
- Industrial safety rules and regulations as applied to a public transit system, including methods for safely and legally handling hazardous materials and hazardous waste.
- Warehouse procedures including the analysis of receipt, storage, issuance, and inventory control methods.
- Principles and practices of budget planning, organization, and administration.
- Principles and practices of supervision.
- Administration of labor contracts.
- Principles and practices of project management including cost estimating, preparation of requests for proposals, and contract and specification preparation and administration.

Ability to:

- Effectively plan, organize, direct, and coordinate the functions and staff activities for area of responsibility.
- Select, supervise, train, motivate, assign, evaluate, counsel, and discipline staff within a union environment.
- Analyze and evaluate complex department/operational problems and recommend and implement effective solutions.



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Santa Cruz METRO

- Evaluate requests for maintenance, repair, installation and modifications to determine the necessity for and the most cost-effective method.
- Interpret plans, specifications, laws, ordinances, and codes applicable to maintenance and repair of transit facilities, office buildings, and related equipment.
- Ensure the delivery of training programs on new equipment and methods as well as departmental procedures and policies.
- Estimate labor and materials requirements; prepare construction, renovation, and purchasing contract specifications; and inspect contracted work for conformance to standards.
- Prepare reports and keep accurate records.
- Function as a liaison with public safety agencies.
- Perform facility inspections for quality assurance purposes.
- Interpret and apply laws, rules, regulations, and labor contract provisions.
- Assist in developing, coordinating, and evaluating the delivery of vendor technical and/or maintenance training programs.
- Evaluate bus maintenance efficiency and reliability by reviewing and analyzing daily logs, field service reports, and management information system data reports, and initiating corrective actions when required.
- Evaluate and recommend staff development and training opportunities.
- Recommend and/or review reports regarding repairs and refurbishment of facilities.
- Maintain records and prepare written reports; perform records and activity management.
- Administer and monitor contracts with vendors.
- Develop and monitor department budgets.
- Ensure the prompt recovery of hazardous spills and the removal of bio-hazardous waste following prescribed safety and hazmat practices and procedures.
- Make oral and written presentations to the Board of Directors, Santa Cruz METRO management, and other groups.
- Utilize standard office equipment and software.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

Education, Training and Experience:

Bachelor's degree from an accredited college in engineering, business administration, or a closely related field.

AND

Eight (8) years of progressively responsible professional experience in facility maintenance including at least four (4) years of responsible supervisory and management experience, preferably in a public agency.



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Familiarity with transit agency or transportation system activities and functions, budget, labor, FTA requirements, facility maintenance, ADA, asset management, and report generation is highly desirable. Experience in a large public organization is preferred.

LICENSES AND CERTIFICATES:

A valid Class C driver license and safe driving record is required at the time of application and appointment and must be maintained throughout employment.

SPECIAL REQUIREMENTS:

- Required to be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work extended hours as needed, often outside regular business hours as required by the CEO and the demands of the job.
- Must maintain strictest confidentiality.
- Must participate in professional development activities.
- Requires occasional travel.

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 regularly required to sit, walk and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional standing, walking, overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in a shop environment where the noise level is usually noisy. May work out in the field when needed. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

Must pass requisite background check.

- *Adopted: 00-00-00
- *BOD Approved: 00-00-00
- *Revised: 00-00-00
- *Job Family: Management-Maintenance

Attachment C



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

Class Code: 3125-OA58

3200-OA58

FLSA Status: Exempt

Assistant Operations Manager – Paratransit Department Bargaining Unit: Management

DEFINITION:

Under general direction of the Operations Manager – Fixed Route Division, the Assistant Operations ~~Manager-Manager-Paratransit Department~~; ~~plans, manages, plans~~, organizes ~~the District Agency's~~ transportation supervision and Operations or Paratransit Control functions; Provides technical direction and supervision over assigned professional, supervisory, technical and administrative support staff; directs and coordinates the activities of a major section or department in the Operations or Paratransit Division; ~~and~~ manages delivery of Santa Cruz METRO's ~~fixed route~~ Fixed Route and ~~ParaCruz-Paratransit~~ service. Ensures Santa Cruz METRO Operations or Paratransit employees meet system performance and customer service standards and comply with related internal policies and procedures, federal and state law; performs related duties as assigned ~~—; May may be assigned to perform Paratransit duties when needed, the Fixed Route Division.~~

DISTINGUISHING CHARACTERISTICS:

This position requires knowledge of the operation and dispatch of Fixed Route and Paratransit functions including the monitoring, controlling, and scheduling of Fixed Route and Paratransit operators, supervisors and department staff ~~—~~ This position is distinguished from the Operations Manager ~~— Fixed Route/Paratransit Department~~ in that the Assistant Operations Manager ~~— Paratransit Department~~ exercises independent judgment in the performance of a variety of professional, complex and difficult management duties and has overall departmental responsibilities under the direction of the Operations Manager ~~— Paratransit Department and the Chief Operations Officer. Fixed Route or and may be assigned to the Operations Manager - Paratransit Department.~~

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.

- Oversees staff to ensure and maintain a high performance and staff conformance with Federal, ~~State~~ State, and Local laws and regulations; Santa Cruz METRO rules and regulations, including the Drug and Alcohol Testing Policy, as well provisions of labor contracts and agreements.
- Communicates with employees in the field to provide advice and assistance on how to handle difficult, sensitive, or potentially dangerous situations as they arise.
- Communicates effectively and respectfully with people from different racial, ethnic, cultural groups, physical and intellectual abilities, lifestyle ~~choices~~ choices, and ages; is sensitive to the needs of clients.
- Participates in establishing operational plans and initiatives to meet department goals and objectives.
- Participates in developing and monitoring performance against the annual departmental budget.

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Participates in the development, implementation, and review of rules and regulations that further Santa Cruz METRO's goal of delivering exceptional public transportation service to Santa Cruz County.
- Participates in the resolution of employee concerns and grievances; makes standard interpretations of labor contract provisions to supervisors and/or staff.
- Evaluates employee attendance, performance, and other issues; makes recommendations on discipline as required; Serves as first level hearing officer for disciplinary hearings.
- Participates in the selection and training of Operations staff.
- Perform as a hands on "working" Manager: Prepares and maintains department records and reports, including payroll, attendance, and system performance statistics; assists in determining staffing needs; Supervises, trains, and evaluates personnel.
- ~~May represent Santa Cruz METRO in court appearances as needed.~~
- Prepares and presents reports at internal and external meetings as well as oral responses to questions from the public.
- May monitor in-field operations and communicates with maintenance and other departments as needed.
- May operate Santa Cruz METRO equipment for the purpose of operator training or in emergency situations.
- Under the direction of the Safety, Security and Risk Director, conducts safety training and licensing audits for Paratransit contractors; trains employees of proper ADA transit techniques and procedures.
- ~~Performs other duties as assigned.~~
- ~~Perform as a hands on "working" Manager.~~
- ~~Supervises, trains, and evaluates personnel.~~
- Reviews and approves disciplinary actions recommended by supervisory personnel, reports and data prepared by supervisory personnel; reviews and approves Agency accident reports.
- ~~Serves as first level hearing officer for disciplinary hearing.~~
- May coordinate special bus services with outside agencies.
- Performs short and midterm planning for department including forecasting manpower;
- Attends meetings as assigned; may represent the Agency in court appearances as necessary.
- May assist in preparation of labor contract negotiations.
- Performs other duties as required

EMPLOYMENT STANDARDS:

Knowledge of:

- ~~Federal, state and local laws and regulations pertaining to transit operations.~~
- Principles and practices of ~~T~~Transit ~~B~~Bus and Paratransit operations-;
- Principles and practices of Transit BBus and Paratransit operator scheduling-;
- Working knowledge of standard office software (e.g., Microsoft Office) systems-;
- Grievance procedures, conflict resolution procedures, and labor relations-;
- Transit scheduling software (i.e. Trapeze, Hastus)-;

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- [Principles and practices of organization, administration, supervision, budgeting, and personnel management of a public transportation agency;](#)
- [Applicable local, state, and federal laws and regulations governing public transportation systems;](#)
- [The goals, organization, and management practices of a public transportation agency;](#)
- [Typical provisions found in public transit collective bargaining agreements;](#)
- [Industrial safety and general safety rules and regulations applied to a public transportation system;](#)
- [Transportation activities and operations;](#)
- [Organizational development techniques and methods as related to curriculum development and training programs for Bus and Paratransit Operators;](#)
- [Comprehensive, specific technical knowledge of the major functions within assigned areas of responsibility.](#)

Ability to:

- Work independently.
- Effectively motivate, ~~train~~, and evaluate the performance of staff.
- Communicate effectively in oral and written form to complete paperwork, and effectively communicate with the majority of clients, employees, and the public.
- Assess and monitor budgets and departmental performance.
- Establish and maintain an effective working relationship with employees, customers and the public.
- [Plan, organize, coordinate, direct, control and manage the assigned areas of responsibility;](#)
- [Oversee subordinate supervisors and delegate and/or monitor responsibilities to ensure smooth operations;](#)
- [Supervise, train, evaluate, counsel, discipline, and motivate staff in a collective bargaining environment;](#)
- [Interpret and apply laws, rules, regulations, and labor contract provisions;](#)
- [Oversee and manage ~~h~~Transit Bus and/or Paratransit operations and training programs;](#)
- [Plan for near and long-term ~~B~~Transit Bus and/or Paratransit expansion and system modifications;](#)
- [Manage the development of ~~B~~Transit Bus service and operating plans;](#)
- [Prepare, interpret, and effectively utilize management information reports, and provide KPI reports;](#)
- [Analyze ~~problems~~situations and recommend and/or implement effective solutions to difficult and politically sensitive ~~problems~~circumstances.](#)

MINIMUM QUALIFICATIONS:

Education, Training and Experience:

Two (2) years college level course work from an accredited college in management, business or public administration, transportation, or a closely related field; [ongoing coursework in obtaining a college degree will be considered.](#)

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

AND

~~Four (4) years of progressively responsible professional experience in transportation administration experience, including at least two (2) years of responsible supervisory and managerial experience, preferably in a public agency.~~

Experience in the following areas is preferable:

- Experience managing ~~an~~ ADA ~~complementary paratransit mandated requirements in operation~~ transit operation service, either publicly operated or privately operated.
- Experience managing contracts in a public transit setting.
- Experience interacting with the public, ~~boards~~ Board of Directors, and Transit advisory committees.
- Experience developing and managing a budget for operation of a relevant service or program.
- Training in Fixed Route or ~~p~~Paratransit supervision/management, passenger assistance techniques, ~~paratransit~~ scheduling software, and management principles.

~~Familiarity with transit agency or transportation system activities and functions is highly desirable. Experience in a large public organization is preferred.~~

LICENSES AND CERTIFICATES:

~~Ability to obtain a~~ valid Class B driver license with Passenger Endorsement and safe driving record is required at the time of application ~~and must be maintained throughout employment. Within a one (1) year period of appointment~~ and must be maintained throughout employment. Within a one (1) year period of appointment, achieve certification in Standardized Emergency Management System (SEMS) and Incident Command Structure (ICS). A valid Class B State driver license with passenger endorsement is required at the time of appointment and must be maintained throughout employment.

SPECIAL REQUIREMENTS:

- Required to be able to respond to ~~Operational situations or~~ emergency situations seven ~~(7 days)~~ days per week, ~~twenty-four (24)~~ twenty-four (24) hours per day.
- Must maintain strictest confidentiality.
- Must participate in professional development activities.
- Requires occasional travel.
- May be required to implement SEMS/ICS processes and procedures during declared emergencies.

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 regularly required to sit, walk and stand; talk and hear; use hands to finger, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. ~~The~~ The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional standing, walking,

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

overhead ~~reaching~~reaching, and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in an office environment where the noise level is usually quiet. May work out in the field when needed ~~or in areas where loud engine noise may be prevalent.~~ ~~May~~ ~~When directed to do so, may need to be available to work a flexible schedule.~~ ~~require availability to work a flexible schedule.~~

OTHER CONDITIONS OF EMPLOYMENT:

Must pass requisite background check.

*Adopted: November 2017

*BOD Approved: 01-26-18

*Revised: ~~00-00-00~~11-16-18

*Job Family: Professional – Operations Paratransit
Professional – Operations Fixed Route

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Attachment D

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: 3125-OA58

3200-OA58

FLSA Status: Exempt

Assistant Operations Manager

Bargaining Unit: Management

DEFINITION:

Under general direction of the Operations Manager – Fixed Route Division, the Assistant Operations Manager; manages, plans, organizes the Agency's transportation supervision and Operations or Paratransit Control functions. Provides technical direction and supervision over assigned professional, supervisory, technical and administrative support staff; directs and coordinates the activities of a major section or department in the Operations or Paratransit Division; manages delivery of Santa Cruz METRO's Fixed Route and Paratransit service. Ensures Santa Cruz METRO Operations or Paratransit employees meet system performance and customer service standards and comply with related internal policies and procedures, federal and state law; performs related duties as assigned;

DISTINGUISHING CHARACTERISTICS:

This position requires knowledge of the operation and dispatch of Fixed Route and Paratransit functions including the monitoring, controlling, and scheduling of Fixed Route and Paratransit operators, supervisors and department staff. This position is distinguished from the Operations Manager – Fixed Route/Paratransit Departments in that the Assistant Operations Manager exercises independent judgment in the performance of a variety of professional, complex and difficult management duties and has overall departmental responsibilities under the direction of the Operations Manager – Fixed Route or the Operations Manager - Paratransit Department.

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.

- Oversees staff to ensure and maintain a high performance and staff conformance with Federal, State, and Local laws and regulations; Santa Cruz METRO rules and regulations, including the Drug and Alcohol Testing Policy, as well provisions of labor contracts and agreements.
- Communicates with employees in the field to provide advice and assistance on how to handle difficult, sensitive, or potentially dangerous situations as they arise.
- Communicates effectively and respectfully with people from different racial, ethnic, cultural groups, physical and intellectual abilities, lifestyle choices, and ages; is sensitive to the needs of clients.
- Participates in establishing operational plans and initiatives to meet department goals and objectives.
- Participates in developing and monitoring performance against the annual departmental budget.
- Participates in the development, implementation, and review of rules and regulations that further Santa Cruz METRO's goal of delivering exceptional public transportation service to Santa Cruz County.
- Participates in the resolution of employee concerns and grievances; makes standard interpretations of labor contract provisions to supervisors and/or staff.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Evaluates employee attendance, performance, and other issues; makes recommendations on discipline as required; Serves as first level hearing officer for disciplinary hearings.
- Participates in the selection and training of Operations staff.
- Perform as a hands on “working” Manager; Prepares and maintains department records and reports, including payroll, attendance, and system performance statistics; assists in determining staffing needs; Supervises, trains, and evaluates personnel.
- Prepares and presents reports at internal and external meetings as well as oral responses to questions from the public.
- May monitor in-field operations and communicates with maintenance and other departments as needed.
- May operate Santa Cruz METRO equipment for the purpose of operator training or in emergency situations.
- Under the direction of the Safety, Security and Risk Director, conducts safety training and licensing audits for Paratransit contractors; trains employees of proper ADA transit techniques and procedures.
- .
- Reviews and approves disciplinary actions recommended by supervisory personnel, reports and data prepared by supervisory personnel; reviews and approves Agency accident reports.
-
- May coordinate services with outside agencies.
- Performs short and midterm planning for department including forecasting manpower;
- Attends meetings as assigned; may represent the Agency in court appearances as necessary.
- May assist in preparation of labor contract negotiations.
- Performs other duties as required

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of Transit Bus and Paratransit operations;
- Principles and practices of Transit Bus and Paratransit operator scheduling;
- Working knowledge of standard office software (e.g., Microsoft Office) systems;
- Grievance procedures, conflict resolution procedures, and labor relations;
- Transit scheduling software (i.e. Trapeze, Hastus);
- Principles and practices of organization, administration, supervision, budgeting, and personnel management of a public transportation agency;
- Applicable local, state, and federal laws and regulations governing public transportation systems;
- The goals, organization, and management practices of a public transportation agency;
- Typical provisions found in public transit collective bargaining agreements;
- Industrial safety and general safety rules and regulations applied to a public transportation system;
- Transportation activities and operations;



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Organizational development techniques and methods as related to curriculum development and training programs for Bus and Paratransit Operators;
- Comprehensive, specific technical knowledge of the major functions within assigned areas of responsibility.

Ability to:

- Work independently.
- Effectively motivate, train, and evaluate the performance of staff.
- Communicate effectively in oral and written form to complete paperwork, and effectively communicate with the majority of clients, employees, and the public.
- Assess and monitor budgets and departmental performance.
- Establish and maintain an effective working relationship with employees, customers and the public.
- Plan, organize, coordinate, direct, control and manage the assigned areas of responsibility;
- Oversee subordinate supervisors and delegate and/or monitor responsibilities to ensure smooth operations;
- Supervise, train, evaluate, counsel, discipline, and motivate staff in a collective bargaining environment;
- Interpret and apply laws, rules, regulations, and labor contract provisions;
- Oversee and manage Transit Bus and/or Paratransit operations and training programs;
- Plan for near and long-term Transit Bus and/or Paratransit expansion and system modifications;
- Manage the development of Transit Bus service and operating plans;
- Prepare, interpret, and effectively utilize management information reports, and provide KPI reports;
- Analyze situations and recommend and/or implement effective solutions to difficult and politically sensitive circumstances.

MINIMUM QUALIFICATIONS:

Education, Training and Experience:

Two (2) years college level course work from an accredited college in management, business or public administration, transportation, or a closely related field; ongoing coursework in obtaining a college degree will be considered.

Experience in the following areas is preferable:

- Experience managing ADA mandated requirements in transit operation service, either publicly operated or privately operated.
- Experience managing contracts in a public transit setting.
- Experience interacting with the public, Board of Directors, and Transit advisory committees.
- Experience developing and managing a budget for operation of a relevant service or program.
- Training in Fixed Route or Paratransit supervision/management, passenger assistance techniques, scheduling software, and management principles.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

LICENSES AND CERTIFICATES:

Ability to obtain a valid Class B driver license with Passenger Endorsement and safe driving record is required at the time of application and must be maintained throughout employment. Within a one (1) year period of appointment, achieve certification in Standardized Emergency Management System (SEMS) and Incident Command Structure (ICS).

SPECIAL REQUIREMENTS:

- Required to be able to respond to Operational or emergency situations seven (7) days per week, twenty-four (24) hours per day.
- Must maintain strict confidentiality.
- Must participate in professional development activities.
- Requires occasional travel.
- May be required to implement SEMS/ICS processes and procedures during declared emergencies.

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 regularly required to sit, walk and stand; talk and hear; use hands to finger, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional standing, walking, overhead reaching, and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

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 works in an office environment where the noise level is usually quiet. May work out in the field when needed or in areas where loud engine noise may be prevalent. When directed to do so, may need to be available to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

Must pass requisite background check.

*Adopted: November 2017

*BOD Approved: 01-26-18

*Revised: 11-16-18

*Job Family: Professional – Operations Paratransit
Professional – Operations Fixed Route

ADDITIONAL MATERIALS
DISTRIBUTED AT THE BOARD MEETING

NEWS CLIPS

October 26, 2018 – November 16, 2018

**SANTA CRUZ
COUNTY
ARTICLES**

Santa Cruz Sentinel

Mayor's message: Corridor study vital to Watsonville

By: Sentinel Staff |

November 3, 2018

As we enjoy the fall colors and crisp mornings in Watsonville, the City Council has been hard at work on one of the most important decisions facing the future of Santa Cruz County's transportation network for decades to come.

Earlier this year, the Regional Transportation Commission released a draft of Step 2 Scenario Analysis for the Unified Corridor Study. The study sets forth four scenarios for the future of the county's transportation infrastructure, including, and perhaps most importantly, the future of the Santa Cruz Branch Rail Line.

Each scenario includes a combination of transportation system improvements, from Highway 1 improvements to dedicated bicycle and pedestrian trails.

It's no secret that Watsonville residents have struggled with a grueling northbound commute for decades, spending hundreds of hours every year in their cars commuting to and from work in Santa Cruz and over the hill.

The study presents an important opportunity for the whole county, and especially Watsonville, to be forward thinking and explore all options available to get our residents moving again. In December, the RTC will make a decision on what scenario to pursue.

To help inform their decision, the Watsonville City Council unanimously recommended Scenario B of the plan, with some modifications. Scenario B includes several components, including:

- Buses on Highway 1 shoulders.
- Metering lights at on-ramps.
- Bus rapid transit.
- Increased bus express service.
- Buffered/protected bike lanes.
- Intersection improvements for pedestrians/bicycles.
- Bike and pedestrian trail along rail corridor.
- Local rail transit along rail corridor.

In addition to the elements including in Scenario B, the Watsonville City Council recommended the following additions and changes:

- Auxiliary lanes on Highway 1.
- HOV lanes on Highway.
- Retention of freight service in Watsonville.
- Removal of Mission Street intersection improvements.

The City Council acknowledged that it was important for Watsonville to have its own voice on this important decision that has a direct and daily impact on our residents. I'm hopeful that our recommendation will chart a course for a future transportation network that ensures equal access across the county for current and future generations.

I love to hear from our community, so please feel free to email me directly your ideas and input at: lowell.hurst@cityofwatsonville.org.

Register-Pajaronian

Trina Coffman-Gomez, Nov. 2: The Complex Unified Corridor Investment Study And What This Decision Can Mean For Relieving Our Traffic Congestion

By: TRINA COFFMAN-GOMEZ -

Posted: Nov 2, 2018

The City of Watsonville received a presentation from the Regional Transportation Commission (RTC) at our council meeting on Oct. 23 regarding the Draft Unified Corridor Investment Study (UCIS). Concerns and questions were raised and addressed including clarification of the various options for the future transportation plans in Santa Cruz County and the 32-mile corridor that was purchased in 2012 from funding that came from voter-approved Propositions 116 and the State's Public Transportation Account.

The council took a precedent move with a unanimous vote on a resolution of support for a hybrid recommendation of one of these scenarios. The council selected the majority of projects in the Option B Scenario that was presented to them. Projects in this option included: bus on shoulder, ramp metering for Highway 1; increasing transit frequency on Soquel Drive and Freedom Boulevard, intersection improvements including safe, buffered bike and pedestrian lanes; and bike and pedestrian trails on the rail transit.

In addition to this supported plan, the council asked that we expand this scenario to adopt a "B-Plus" option that also includes:

- Prioritizing all the Measure D projects for Highway 1, which includes auxiliary lanes that Watsonville residents are paying their share of Measure D funds towards
- Include rail freight service to support our local businesses that benefit from this service
- Passenger rail: which is supported in the 2018 Caltrans Cross Valley Corridor State Rail Plan
- Continuation of a bike and pedestrian Coastal Rail Trail build out that extends to both ends of the county along the rail corridor and integrates the 33 miles of trails planned within the city limits. The Coastal Rail Trail is part of a broader Sanctuary Scenic Trail (MBSST) Network whose Master Plan was adopted by the RTC, the City of Watsonville as well as other local jurisdictions.
- Bus on shoulder while also considering addition of (High Occupancy Vehicle) HOV lanes for Highway 1, if funding can be identified
- Removing funding of a downtown Santa Cruz-specific project for Mission Street intersection improvements since there was not an equitable distribution of project money available for a Watsonville downtown project

This resolution of recommendation will be provided to the Regional Transportation Commission at their next public hearing on this matter, which will be a special meeting held in the Watsonville Council Chambers on Nov. 15 at 6 p.m.

Trina Coffman-Gomez is a councilwoman for the City of Watsonville and is also the city's representative on the Regional Transportation Commission. She will be putting together a series of articles this month to break down the information on the decisions and projects the RTC will identify to improve moving people in Santa Cruz County.

Register-Pajaronian

RTC Hires New Executive Director

By: STAFF REPORT -

Nov 2, 2018

SANTA CRUZ COUNTY — Guy Preston has been hired as the Santa Cruz County Regional Transportation Commission's new executive director, the agency recently announced.

Preston has more than 28 years of experience in project delivery and construction management in the transportation sector. During his tenure as the Director of Projects and Programming at the Sonoma County Transportation Authority (SCTA), he provided direction and oversight in the development and delivery of over \$1.5 billion in federal, state, regional and local transportation programs.

As president and owner of the consulting firm GC Preston, Professional Corporation, he provided project, program and contract management services on more than \$1.8 billion in transportation projects.

"Guy Preston has the proven skills and leadership qualities that make him an excellent fit for our Regional Transportation Commission," said Santa Cruz County Supervisor and RTC Chair John Leopold.

Preston has a degree in civil engineering from UC Berkeley and is a licensed civil engineer. For the past four years, he has served as Regional Delivery Manager for the California High-Speed Rail Authority where he was responsible for the delivery of high-speed rail infrastructure projects for the \$14 billion Northern California region.

"I am excited to work collaboratively to develop and deliver sustainable transportation solutions to the region," Preston said.

Preston will replace George Dondero, who is retiring in December.

Preston will enter into a three-year contract with the RTC and will report directly to the Board of Directors. He is expected to start on Dec. 3.

Council Takes Stance On Transportation Study

By: Erik Chalhoub - Tuesday, October 30, 2018

WATSONVILLE — The Watsonville City Council unanimously supported one of five transportation scenarios outlined in a recently-released study Wednesday.

The Unified Corridor Investment Study draft Step 2 Scenario Analysis report was released in late September by the Regional Transportation Commission.

The study looks at different transportation investments that could be made on Highway 1, Soquel Avenue/Soquel Drive/Freedom Boulevard, and the Santa Cruz Branch Rail Line.

The study's draft report, developed by Kimley-Horn and Associates, Inc. and Strategic Economics, Inc., is organized into two sections: The baseline information, which presents the existing conditions of the transportation system, and a scenario analysis, which presents projects estimated to be completed by 2035.

The five scenarios cover a variety of options, such as bus lanes on Highway 1, passenger rail service, carpool lanes and more. A "no build" scenario is also included.

Watsonville Public Works and Utilities Director Steve Palmisano said city staff recommended the council support Scenario B, which includes bus improvements and passenger rail service with a trail. But staff also suggested adding other projects from different scenarios, including freight rail service in Watsonville and auxiliary lanes on Highway 1.

The council voted to support Scenario B, but suggested that carpool lanes be added to scenario while eliminating improvements to the Mission Street intersection in Santa Cruz.

According to the draft study, all scenarios provide slight improvements to the average speed on northbound Highway 1 during peak morning commute hours. The "no build" scenario puts the average speed on Highway 1 between San Andreas Road and Santa Cruz at 12 mph, while the other scenarios range from 17 mph to 39 mph.

Overall speed across all corridors in the study remains about the same in all scenarios from now to 2035.

The cost of the scenarios range from \$740 million to \$1.3 billion, with only about half of the funding possibly available. Annual cost of maintenance is an additional \$25-\$47 million.

According to Senior Transportation Planner Grace Blakeslee, the RTC is scheduled to hear the recommended scenario during a public meeting in Watsonville on Nov. 15, and make a final decision on Dec. 6.

Getting Watsonville's input on the study is crucial when the RTC deliberates a preferred scenario, Palmisano said.

"Watsonville has most at stake in this particular issue in that so many residents make the commute north on Highway 1 and sit in that traffic both ways, every day," he said.

Councilman Aurelio Gonzalez agreed, saying North County residents don't feel the brunt of the highway's congestion on a daily basis.

"Now is an important time for the City of Watsonville to step up and say this is what we want, not wait for somebody to tell us this is what you need," he said.

A small group of people from across the county stayed for the meeting as it ran into the early morning to give their input on the study.

Silvia Morales of Watsonville said she spends three hours daily commuting on Highway 1 while transporting her children to and from school. But she said she was most concerned about the council's "lack of understanding" of the study.

"No one really understands how your lack of understanding impacts me in getting to the other side of the county," she said.

Ashley Winn of La Selva Beach said the La Selva Beach Improvement Association "overwhelmingly" voted against the rail with trail proposal, citing costs and space constraints.

"If you go with Scenario B, that's the end of widening the highway," he said. "Scenario B gives the RTC an excuse not to widen Highway 1."

Palmisano pointed out that once the RTC approves a scenario, it will still be many more years of studies, such as cost and environmental analyses.

"Right now everything is very conceptual," he said.

Finding Solutions to Traffic

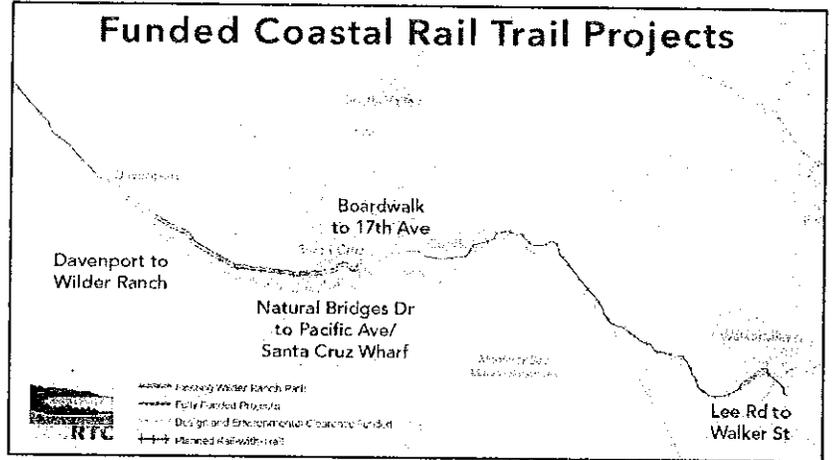
By Shannon Munz, RTC Communications Specialist

Anyone that has driven in Santa Cruz County is familiar with how heavily traveled our roads are. Not only does this bring congestion and safety concerns for drivers, greenhouse gas emissions from transportation are also a concern. At the RTC, these are all things that we think about and work toward finding solutions for. Our staff is committed to finding ways to maximize the efficiency of the county transportation system while improving mobility, access and air quality.

The RTC has been working on the Unified Corridor Investment Study (UCS) for nearly the past two years. The objective of this study is to evaluate how Highway 1, Soquel Avenue/Drive and Freedom Boulevard, and the Santa Cruz Branch Rail Line can work together most effectively to serve people using a range of modes including: driving cars, taking transit, riding bicycles and walking. The study's goals focus on developing a sustainable and well-integrated transportation system while maximizing benefits in terms of efficient mobility, health and equity, the natural environment, and economic vitality.

The draft results of the different scenarios studied in the UCS were recently released and can be viewed at www.sccrtc.org.

Community input on how best to improve the economic vitality, natural environment, and health and equity goals of our region through investments in transportation



services is vital to the success of this study. The RTC will be holding two public meetings to get feedback on these draft results. All members of the community are invited to attend these meetings. Input can also be provided to ucs@sccrtc.org or mailed to the RTC at 1523 Pacific Ave., Santa Cruz 95062.

- **Monday, Oct. 15, 6-7:30 p.m.,** Live Oak Elementary School, Multi-Purpose Room, 1916 Capitola Road, Santa Cruz
 - **Tuesday, Oct. 16, 6-7:30 p.m.,** Civic Plaza Community Room, 4th floor, 275 Main St., Watsonville
- Monterey Bay Sanctuary Scenic Trail**

On Sept. 18, the California Coastal Commission unanimously approved a new 10-foot-wide multi-use path on the San Lorenzo Trestle Bridge. This new path is a part of the Monterey Bay Sanctuary Scenic Trail, a network that merges plans for a bicycle/pedestrian trail along the Santa Cruz Branch Rail Line with

coastal access and neighborhood spurs that will eventually form a 50-mile connected network that will overlap and converge to provide safe and convenient car-free route choices.

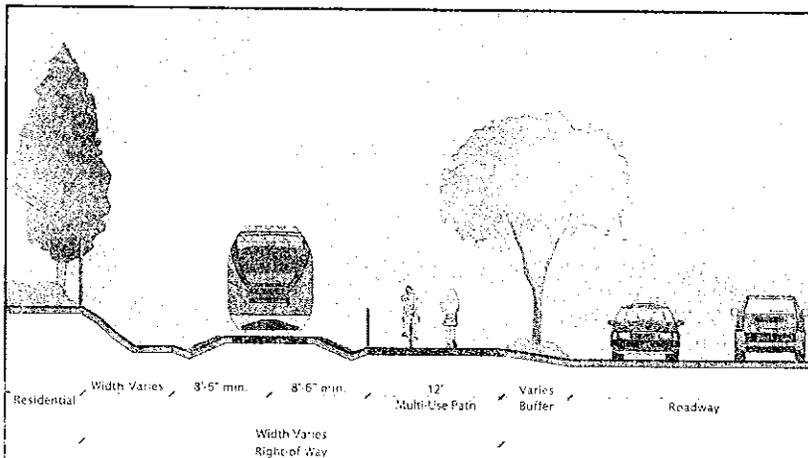
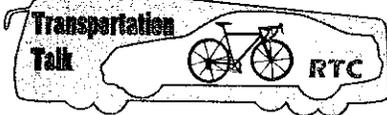
This trail will provide a wider pedestrian and bicycle path between the Seabright neighborhood and the Santa Cruz Beach Boardwalk, replacing the current four-foot wide path. This exciting project is another step forward in the process to build the Coastal Rail Trail for our community to enjoy. The public should be able to take advantage of this great community resource by next summer as the City of Santa Cruz hopes to bid, build and open the trail before Memorial Day 2019.

Along with the San Lorenzo Trestle Bridge section, 13 total miles of Monterey Bay Sanctuary Scenic Trail projects have been either fully or partially funded. Different segments are in different stages of the design, engineering and environmental permitting process, and construction will begin as these processes are completed. The Monterey Bay Sanctuary Scenic Trail Network will be a valuable asset to the community for transportation, recreation, education, coastal access and economic vitality.

More information on the Monterey Bay Sanctuary Scenic Trail can be found at www.sccrtc.org/trail.

•••

If you have questions for the RTC or there are transportation-related issues you would like to see us cover, feel free to contact Shannon Munz, RTC Communications Specialist, at smunz@sccrtc.org. For more information on the RTC, visit sccrtc.org.



Santa Cruz Sentinel

Partly sunny
H: 75 L: 54
PAGE B12

Friday, October 26, 2018

\$1.50 FACEBOOK.COM/SCSENTINEL TWITTER.COM/SCSENTINEL

TRANSPORTATION

Santa Cruz RTC names new chief

By Jondi Gumz

jgumz@santacruzsentinel.com
[@jondigumz on Twitter](https://twitter.com/jondigumz)

SANTA CRUZ » Guy Preston, the new executive director of the Santa Cruz County Regional Transportation Commission, is very familiar with congestion on Highway 1 and the hazards of driving Highway 17 because he's lived in Santa Cruz for the past four years.

"I hope to be able to come in and make improvements," he said. Preston, 52, will start work Dec.

3 on a three-year contract, with a salary of \$210,000. He will report to the RTC board, which is slated to act Dec. 6 on the corridor study, which offers four options to spend millions to improve transportation over 30 years.

"Guy Preston has the proven skills and leadership qualities that make him an excellent fit for our Regional Transportation Commission," said John Leopold, Santa Cruz County supervisor and RTC chairman.

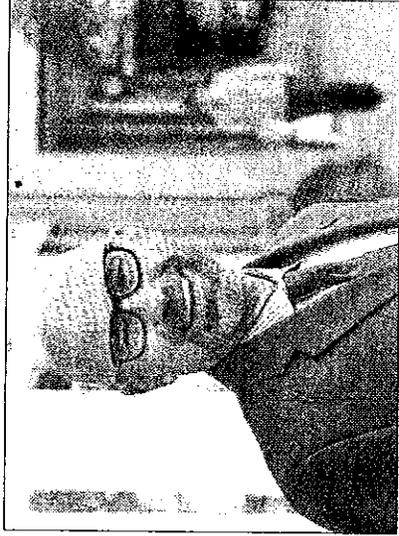
"I was impressed with Guy

right from our first meeting — he possesses all the core values to lead, inspire, and shape the future of the RTC," said Ed Bottorff, Capitola city councilman and RTC vice chairman.

Santa Cruz RTC leaders cited Preston's success leveraging sales tax revenues to secure more funding — five times the local dollars — for highway improvements in Sonoma County.

Preston has 28 years of experience in transportation projects.

RTC » PAGE 2



Santa Cruz resident Guy Preston takes over as Regional Transportation Commission Director, succeeding George Dondero, who is retiring, on Dec. 3.

DAN COYR0 — SANTA CRUZ SENTINEL

RTC

FROM PAGE 1

A graduate of UC Berkeley with a civil engineering degree, he started his career at Caltrans in Mendocino County, then went to work for the Sonoma County Transportation Authority, overseeing a \$480 million transportation sales tax.

Four years ago, he became Northern California regional manager for the state's high-speed rail project, commuting to work from Santa Cruz.

He told the Sentinel on Thursday his biggest accomplishment was obtaining funding to widen Highway 101 with high-occupancy vehicle lanes.

Sonoma County had passed a sales tax for transportation to fund a 20-year improvement plan; the tax did not fully fund the projects so Preston leveraged the local money to obtain additional funding.

Preston said he has a record of delivering projects "on time on budget."

He was on the staff of the Sonoma County Transportation Authority, then worked for the agency as a consultant, living in Ashland, Oregon, before buying a home in Santa Cruz in 2010.

When he saw transportation money drying up, he decided to take the high-

speed rail job.

"The rail authority had money, and it was an opportunity to learn something new," he said.



Preston

One lesson learned, he said, was how to work with a community in which there

are different opinions.

He shared an example where the community south of San Jose wanted the new high-speed rail to use existing rail line owned by Union Pacific rather than build new track. As a result, he said, the rail authority opted to re-engage Union Pacific in negotiations; an agreement has not been reached yet.

"The authority really listened," Preston said.

The high-speed rail project from Los Angeles to San Francisco, which could cost \$77 billion to \$100 billion, has experienced delays in acquiring necessary land and cost overruns.

Brian Peoples, executive director of Trail Now, criticized Preston's selection.

"Just another example of how incredibly out of touch the RTC is with the needs of our county, prioritizing a boondoggle train over highway widening and continuous trail by hiring a former California high-speed rail manager," Peoples said.

MEET GUY PRESTON

What: The new Santa Cruz County Regional Transportation Commission chief Guy Preston will attend the RTC meeting from 9 a.m. to noon Dec. 6.

Where: Santa Cruz County Board of Supervisors chambers, 701 Ocean St., Santa Cruz.

Information: sccrtc.org/

Preston countered the criticism is not fair.

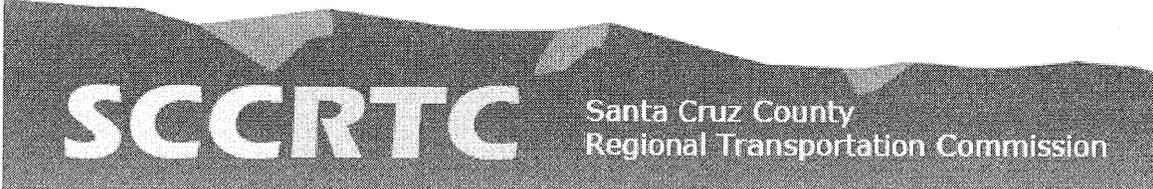
"People shouldn't rush to judgment," he said. "I'm not coming to the RTC with an agenda. I'm very open-ended."

Every transportation project comes with controversy, he said, citing one in Fort Bragg over replacing a historic bridge.

Residents wanted a bridge with more vistas than what Caltrans had in mind. The California Coastal Commission insisted a solution be found. Preston said a resident researched designs, and one was tested and approved for that location.

Preston, who is married and has four sons, said he plans to bike to work. He's also an active member of the yoga community, saying he finds the meditative benefits "useful for all aspects of life."

Contact reporter Jondi Gumz at 831-706-3253.



SCCRTC

Santa Cruz County
Regional Transportation Commission

RTC Board Announces Guy Preston as New Executive Director

The Santa Cruz County Regional Transportation Commission (RTC) is pleased to announce that, after an extensive search, Guy Preston has been hired as the agency's new Executive Director.

Preston has over 28 years of experience in project delivery and construction management in the transportation sector. During his tenure as the Director of Projects and Programming at the Sonoma County Transportation Authority (SCTA), he provided direction and oversight in the development and delivery of over \$1.5 billion in federal, state, regional and local transportation programs. While at SCTA, he also provided day-to-day management of Sonoma County's \$480 million local transportation sales tax measure, similar to Santa Cruz County's Measure D, and delivered the first 10-years of projects for the measure.

As president and owner of consulting firm, GC Preston, Professional Corporation, he provided project, program and contract management services on over \$1.8 billion in transportation projects. He also continued his work with SCTA and strategically leveraged Measure M funds to secure other funding for SCTA projects, including the highway program at a rate of 5:1.

"Guy Preston has the proven skills and leadership qualities that make him an excellent fit for our Regional Transportation Commission," said Santa Cruz County Supervisor and RTC Chair John Leopold.

"I was impressed with Guy right from our first meeting. He possesses all the core values to lead, inspire, and shape the future of the RTC," said RTC Vice-Chair Ed Bottorff.

Preston has a degree in civil engineering from UC Berkeley and is a licensed civil engineer. For the past four years, he has served as Regional Delivery Manager for the California High-Speed Rail Authority where he was responsible for the delivery of high-speed rail infrastructure projects for the \$14 billion Northern California region. He will bring a wealth of experience in engineering, public policy, project/programming/construction management, financing and dispute resolution on multi-modal transportation projects to his new role leading the RTC.

"I am excited to work collaboratively to develop and deliver sustainable transportation solutions to the region," Preston said.

Preston will enter into a three-year contract with the RTC and will report directly to the Board of Directors. He is expected to start on Dec. 3.

N Santa Cruz Weekly

MOVING FORWARD

The highly anticipated Unified Corridor Study is out—and everybody's arguing about what it means

BY JACOB PIERCE

The new Unified Corridor Study (UCS) analysis represents a big step forward, said Capitola City Councilmember Ed Bottorff at the Santa Cruz County Regional Transportation Commission (RTC) meeting last Thursday.

Staff and consultants made the 200-plus-page document as complete as possible, said Bottorff. Experts surveyed the best ways to get from one end of the county to the other. The most closely watched portion of the analysis has been the question of what to do with one of the three major north/south avenues—the county's coastal freight rail corridor. The document has a lot of numbers and estimates, some of them open to interpretation.

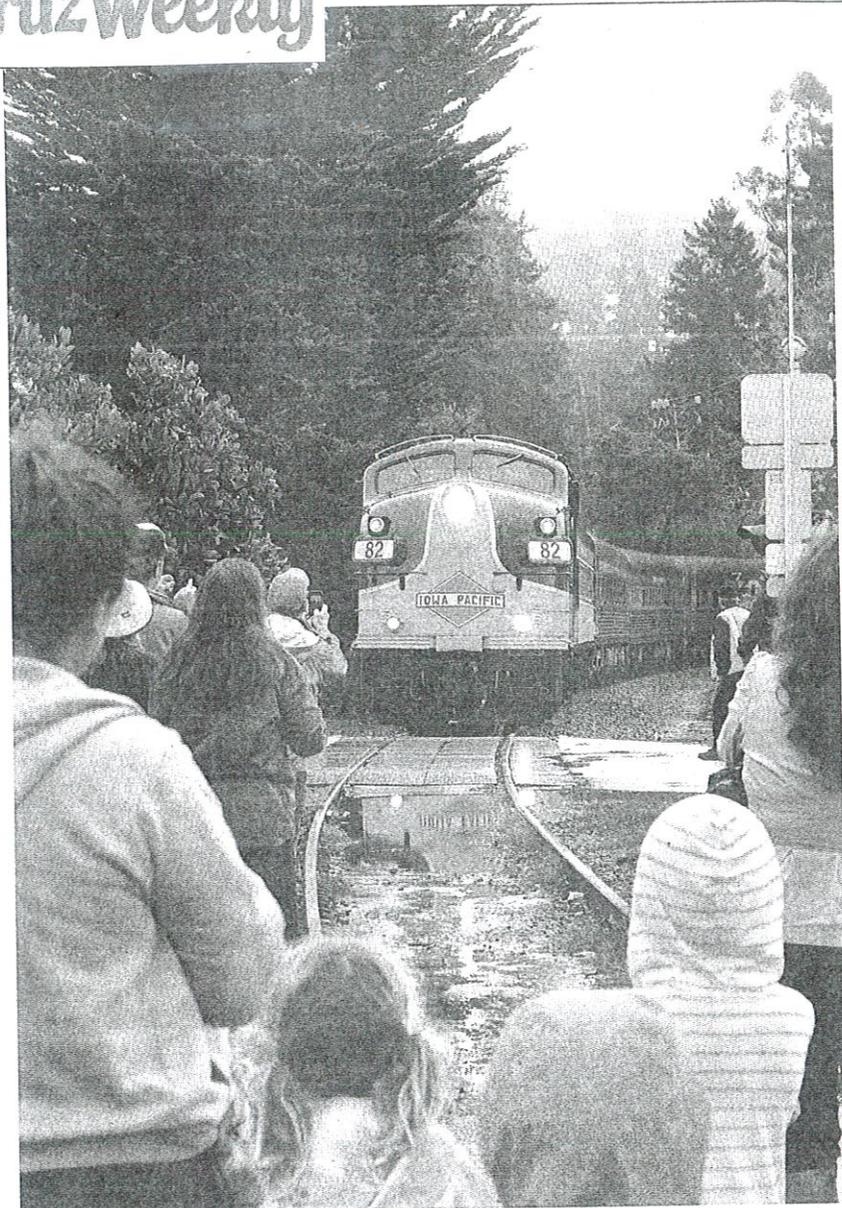
The costs are estimates, and many of the calculations are moving targets, said Bottorff. "As we've all learned in construction, some projects may seem like they cost a certain amount, and most likely, they're gonna cost more," he said. "So I think everyone should just take that into consideration when they look at this."

Friends of the Rail and Trail tout the analysis as proof that a train is not only feasible, but also the best use for the corridor. Members of Greenway and Trail Now, who want the corridor used for a wider trail with no train, say that the estimates have a pro-rail bias and are further proof that the whole process has been unfair.

There will be two public meetings this month on the UCS analysis, one in Live Oak and another in Watsonville. Staff will present a recommendation on a preferred scenario on Nov. 15. The commission may vote and take action no sooner than Dec. 6. (That date would be three days after the RTC's next executive director is expected to take over for George Dondero, who is retiring.)

Each scenario outlined in the study has a mixture of different options. The first one features carpool lanes, additional auxiliary lanes, on-ramp metering, intersection improvements, and a form of bus rapid transit—as well as a bike/pedestrian rail trail, but no train.

Commissioner Randy Johnson, **>14**



LOCOS ONLY County train lovers celebrated public ownership of the coastal rail line on a rainy fall day eight years ago.

MOVING FORWARD <11

a Scotts Valley city councilmember, compared the various scenarios to four pre-made pizzas. Furthering his metaphor, Johnson suggested the commission should take a more central role in building its own pizza, although the commission did approve the chosen scenarios last year.

Johnson also felt that the consultants should have updated commissioners as they worked on their study.

Commissioner Andy Schiffrin, who is a staffer for Supervisor Ryan Coonerty, said the consultants never talked to him—and he's glad they didn't. Schiffrin said if critics believe the study is just a sham, meddling from the commission would only

contribute to that perception.

"What we wanted was an independent analysis, and an independent analysis doesn't mean you asked people along the way what they were doing," Schiffrin said. "What it means is you wait until the end, and then you get mad."

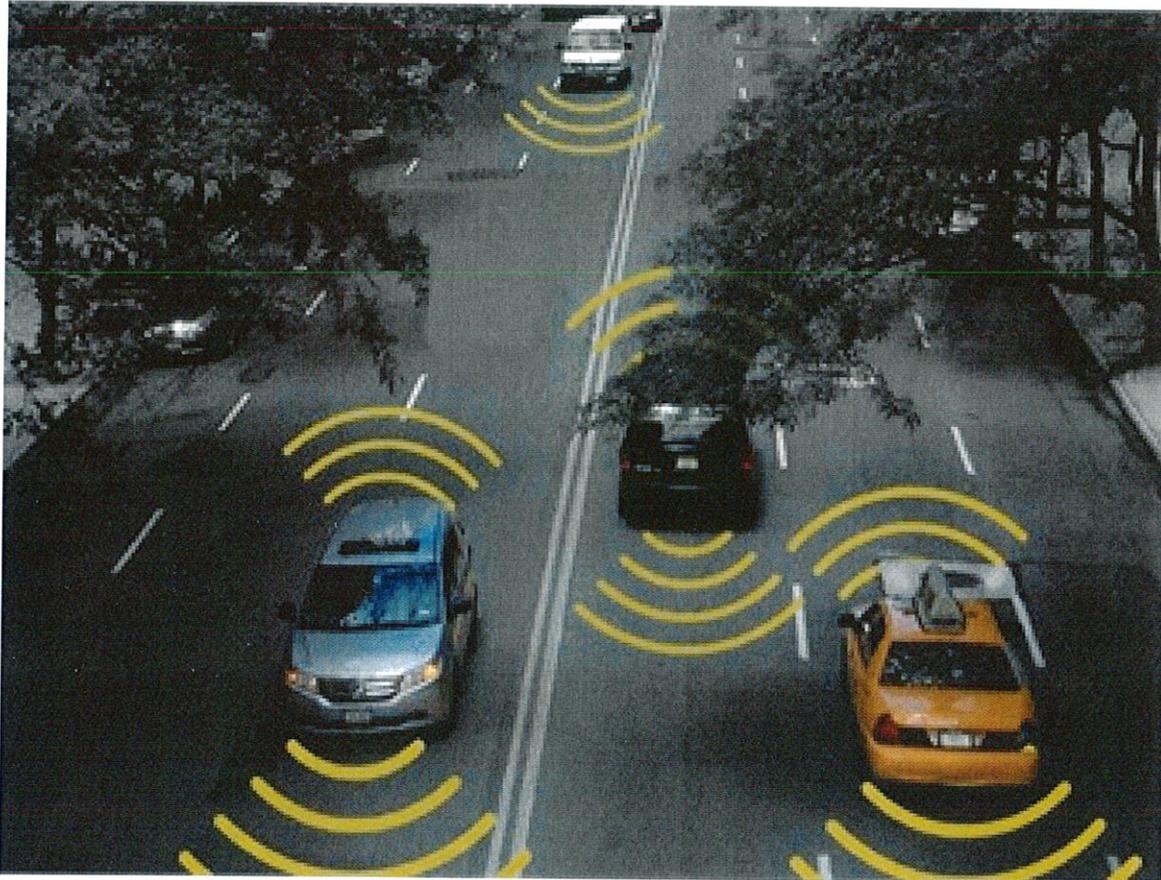
There will be two public meetings on the UCS analysis. The first is 6-7:30 p.m. on Monday, Oct. 15 at Live Oak Elementary School's multi-purpose room. The second will be 6-7:30 p.m. on Tuesday, Oct. 16, in the Watsonville Civic Plaza Community Room A, on the fourth floor of the City Hall building. Input can also be emailed to ucs@scrtc.org, or mailed to the RTC at 1523 Pacific Ave., Santa Cruz, 95062.

Other Transit Related Articles

METRO For Transit & Motorcoach Business

Report Shows Which Countries Are Most Prepared For Autonomous Tech

Posted on November 8, 2018



A country's economic development correlates strongly with preparedness for autonomous vehicles, according to KPMG's report on the technology. Image: Southwest Research Institute

Autonomous vehicles (AVs) are poised to revolutionize not only transportation but the way people live and work throughout the world. But are countries ready for an AV-driven future? The 2018 KPMG Autonomous Vehicles Readiness Index (AVRI) evaluates the preparedness of 20 countries globally for the introduction of self-driving vehicles, and highlights best practices to help countries accelerate AV adoption.

The AVRI examines where countries are today in terms of progress and capacity for adapting AV technology. The Index evaluates each country according to four pillars that are integral to a country's capacity to adopt and integrate autonomous vehicles: policy & legislation; technology & innovation, infrastructure and consumer acceptance.

The pillars are comprised of a number of variables that reflect the wide range of factors that impact a country's AV readiness, from the availability of electric vehicle charging stations, to AV technology R&D, to the population's willingness to adopt technology, to the regulatory environment.

Countries most ready for autonomous vehicles

According to the AVRI, the 10 countries most prepared for the future of autonomous transportation of those researched are:

- Netherlands
- Singapore
- United States
- Sweden
- United Kingdom
- Germany
- Canada
- United Arab Emirates
- New Zealand
- South Korea

The Netherlands ranks consistently high — in the top four across all four pillars — with strengths including widespread acceptance of electric cars and a high density of charging stations, a robust telecommunications network, vital for directing AVs, and large scale AV road tests planned. Others in the top five display a range of strengths, with Singapore ranking first in policy & legislation and consumer acceptance, the U.S. and Sweden ranked first and second, respectively, in technology & innovation and the UK ranked in the top five for three pillars.

Accelerating advancement of autonomous vehicles

Overall, a country's economic development correlates strongly with preparedness for AVs, however looking deeper, the AVRI highlights some consistent attributes among the most prepared countries. These include public authorities engaged in and supporting AV development, excellent roads and mobile network infrastructure, and private sector investment and innovation.

“Planning today for an AV future is essential, because it is not a question of if, but when, AVs become the dominant mode of transport,” says Richard Threlfall, Global Head of Infrastructure, KPMG International. “Embracing partnerships between government and the private sector can speed technology development, while helping ensure that the introduction of AVs meet public policy objectives. Finally, it is important to engage all stakeholders — government, business and citizens — in planning for AVs. It's not just about transportation; we need to be prepared for the impact of AVs on all aspects of our lives.”

METRO For Transit & Motorcoach Business

85% Of Transportation-Related Ballot Measures Successful

Posted on November 7, 2018

Ballot measures, which increased or secured investment in public transit, earned the approval of voters in states from California to Connecticut, New Mexico to Maine, and Virginia to Florida on Tuesday.

Overall in 2018, public transportation won 30 of 36 ballot measures in primary and general elections, a win percentage of 83%, according to APTA. On Tuesday, voters passed 17 of 20 transportation-related ballot measures — an approval rate of 85%. Two measures remain undecided in San Mateo, Calif. and Flagstaff, Ariz. Over the past two decades, public transportation measures have won more than 70% of the time.

“The voters have spoken and put their vote, and hard-earned tax dollars, where they know it’s needed, by investing in public transportation,” said APTA President/CEO Paul P. Skoutelas. “From big cities to small municipalities, voters approved measures that will expand and improve public transit, spur economic development and job creation, and connect communities and the people who live in them. November 6 was a banner day for public transportation at the ballot box.”

In California, the effort to roll back fuel taxes and vehicle registration fees that pay for transportation and infrastructure projects in California was defeated by a strong majority.

Prop. 6, the so-called gas-tax repeal, would have overturned Senate Bill 1 — the Road Repair and Accountability Act. The bill passed the state Legislature by a two-thirds majority last year, adding 12 cents a gallon for gasoline, 20 cents for diesel, and increasing vehicle registration fees.

“People know you get what you pay for,” said Gov. Jerry Brown. “We have built hundreds of thousands of miles of roads and highways, and you got to keep them fixed up. Everybody knows, if you don’t fix your roof, it leaks.”

In Fla., voters approved Referendum Number 2 in Hillsborough County, which contained a 1% increase in the sales tax that expires in 30 years.

Forty-five percent of the revenue generated is earmarked for the Hillsborough Area Regional Transit.

In Broward County, Fla., voters approved a proposal to levy a 1% sales tax for 30 years that will go to countywide transportation improvements.

Overall, \$9 billion of the \$15.6 billion in raised revenue will be for new light rail lines, while the rest of the revenue will go toward new and enhanced local bus routes, expanded paratransit and community shuttle service, bike lanes, smart signal technology for traffic lights to adapt in real time, and roadway drainage to prevent flooding.

Meanwhile ballot measures in Austin, Texas and Arlington County, Va., were overwhelmingly passed, with an 81% majority.

In Austin, voters approved Proposition G — a \$160 million bond measure that will go to road, street, sidewalk, intersection, and pedestrian safety improvements and urban trails. In Arlington County, voters passed Bond Referendum 1, which will generate \$74.57 million for a variety of transportation, road, pedestrian enhancement, and transit projects across the county. The largest components of the proposal are expected to be \$44 million for Arlington County's share of WMATA's capital improvement program, and \$21 million to fund a portion of the costs for paving local streets and roadways.

For a table of results of public transportation-related ballot measures, please see attached.

2018	TN	Nashville	An increase in four separate taxes to fund a light rail system and bus improvements.	\$3.4 Billion	Special	5/1/2018	LOSS
2018	CA	Bay Area	Regional Measure 3 was voted on in 9 counties. An increase in the bay area bridge tolls to pay for more BART cars, expand Muni's fleet, increase ferry service, study a second Transbay Tube, and also funds for highway improvements.	\$4.45 Billion	Primary	6/5/2018	WIN
2018	MO	Kansas City	Special sales tax for expanding the Kansas City Streetcar to UMKC.		Special	6/12/2018	WIN
2018	MO	Kansas City	Special property tax for expanding the Kansas City Streetcar to UMKC		Special	6/12/2018	WIN
2018	WV	Parkersburg	A levy for the operation of Easy Rider.	\$2 million annually	Primary	5/8/2018	WIN
2018	WV	Vienna	A levy for the operation of Easy Rider.	\$800,000 annually	Primary	5/8/2018	WIN
2018	WV	Marion County	A levy renewal for the Fairmont-Marion County Transit Authority.		Primary	5/8/2018	WIN
2018	ND	Lincoln	A 2 mill property tax increase to fund paratransit service.		Primary	6/12/2018	LOSS
2018	MI	Ann Arbor	A 5-year 0.7-mill property tax renewal. Will appear on the ballot in Ann Arbor, Ypsilanti, and Ypsilanti Township		Primary	8/7/2018	WIN
2018	MI	Oakland County	A renewal of the 1-mill SMART millage	\$71.4 million annually from all three counties	Primary	8/7/2018	WIN
2018	MI	Macomb County	A renewal of the 1-mill SMART millage	\$71.4 million annually from all three counties	Primary	8/7/2018	WIN
2018	MI	Wayne County	A renewal of the 1-mill SMART millage.	\$71.4 million annually from all three counties	Primary	8/7/2018	WIN
2018	MI	Sayre-Noc Township	A five-year 0.5 mill levy for the Delta Area Transit Authority	\$14,264	Primary	8/7/2018	WIN
2018	MI	Bark River Township	A five-year 0.5 mill levy for the Delta Area Transit Authority	\$19,510	Primary	8/7/2018	WIN
2018	MI	Escanaba Township	A five-year 0.5 mill levy for the Delta Area Transit Authority	\$54,987	Primary	8/7/2018	WIN
2018	MI	Cornell Township	A five-year 0.5 mill levy for the Delta Area Transit Authority	\$10,907	Primary	6/7/2018	LOSS
2018	AZ	City of Flagstaff	Proposition 421 is a 0.15% increase in the sales tax for increasing public transportation service (from a current 0.295% rate), for 11 years.		General	11/6/2018	TOO CLOSE, UNDECIDED
2018	CA	Statewide	A repeal of the gas tax and vehicle fees implemented by the California legislature in 2017 (SB 1). The increases raise more than \$5 billion annually, with the proceeds going to transportation projects across the state.		General	11/6/2018	WIN
2018	CA	San Mateo County	A half-cent sales tax aimed at relieving traffic congestion. Half for maintaining and enhancing rail, bus, paratransit and other public transit options in the county. Another 10 percent for providing new and enhanced transit options for residents traveling to neighboring counties.	\$2.4 Billion	General	11/6/2018	TOO CLOSE, UNDECIDED
2018	CA	San Benito County	A one-cent sales tax for transportation investments, including transit options for 30 years	\$16 million annually	General	11/6/2018	WIN
2018	CA	Marin County	A renewal of the half-cent sales tax for transportation to 2049.	\$25 million annually	General	11/6/2018	WIN
2018	CO	Aspen	A new 2.6 mill property tax for RFTA (they have an existing sales tax). Will include improvements such as 30 minute service, increased weekend services, and expanded services		General	11/6/2018	WIN
2018	CO	Statewide	Let's Go Colorado (Proposition 110) is a .62 percent increase in the state sales tax for transportation projects. 45 percent will be devoted to state highway needs, 40 percent to local government transportation needs, and 15 percent to multimodal transportation, including transit. It is running against a competing road-only measure, Proposition 109.	\$700 million annually, \$20 billion over 20 years	General	11/6/2018	LOSS
2018	CT	Statewide	The Connecticut Transportation Revenue Lockbox Amendment would prohibit lawmakers from using state transportation funds for activities other than transportation. It would also prohibit the payment of transportation-related debts.	NA	General	11/6/2018	WIN

2018	FL	Tampa	A one-cent increase in the sales tax for a 30-year period for transportation. 45 percent would go to HART.		General	11/6/2018	WIN
2018	FL	Broward County	A one-cent increase in the sales tax for a 30-year period for transportation upgrades. Funding for electric buses and light rail could be possible transit applications.	\$300 million annually	General	11/6/2018	WIN
2018	ME	Statewide	Maine Question 3 is \$105 million in general obligation bonds for transportation infrastructure projects, of which some funds would go to transit (majority for highways and bridges).	\$105 million	General	11/6/2018	WIN
2018	MI	Royal Oak	A 1.25-mill property tax increase to fund a bus service that operates at night and on weekends		General	11/6/2018	LOSS
2018	MI	Buchanan	A four-year renewal of the 1-mill tax for Dial-A-Ride	\$87 thousand annually	General	11/6/2018	WIN
2018	MI	Bay County	A renewal of the 0.75 mill levy and an increase of 0.25 mills to pay for operations for the Bay Metropolitan Transportation Authority. The current millage ends in 2020, it would be renewed through 2025.		General	11/6/2018	WIN
2018	NM	Los Alamos County	Renewal of a one-eighth of 1 cent gross receipts tax to support the Rail Runner express and the regional bus system (North Central Regional Transit District). The tax had set to expire in 2024, but this measure will extend it indefinitely.	\$14.5 million annually from the four counties	General	11/6/2018	WIN
2018	NM	Rio Arriba County	Renewal of a one-eighth of 1 cent gross receipts tax to support the Rail Runner express and the regional bus system (North Central Regional Transit District). The tax had set to expire in 2024, but this measure will extend it indefinitely.	\$14.5 million annually from the four counties	General	11/6/2018	WIN
2018	NM	Santa Fe County	Renewal of a one-eighth of 1 cent gross receipts tax to support the Rail Runner express and the regional bus system (North Central Regional Transit District). The tax had set to expire in 2024, but this measure will extend it indefinitely.	\$14.5 million annually from the four counties	General	11/6/2018	WIN
2018	NM	Taos County	Renewal of a one-eighth of 1 cent gross receipts tax to support the Rail Runner express and the regional bus system (North Central Regional Transit District). The tax had set to expire in 2024, but this measure will extend it indefinitely.	\$14.5 million annually from the four counties	General	11/6/2018	WIN
2018	PA	Philadelphia	A transportation bond for a variety of capital purposes, including transit	\$181 million	General	11/6/2018	WIN
2018	VA	Arlington County	A bond issuance for a variety of transportation projects across the county, including \$44 million for WMATA Metro's capital improvement program.	\$74.57 million	General	11/6/2018	WIN
2018	WA	Lewis County	A proposal to expand public transit services by extending a 0.2% sales tax to parts of the outside of Chehalis and Centralia for Twin Transit.		General	11/6/2018	LOSS
2018	WA	Olympia	An additional 0.4 percent sales and use tax to maintain existing service and fund investments for intercity transit.	\$16 to \$20 million annually	General	11/6/2018	WIN

METRO For Transit & Motorcoach Business

Electrified Fleet Vehicles Drive Mass Transit Forward

Posted on November 6, 2018 by Paul Stith



The U.S. government is doing its part to support the drive to zero-emissions transit, providing tens of millions in “No/Low-Emission” grants for vehicles and supporting infrastructure.
New Flyer

With major cities across the U.S. having made the decision to shift to all-electric bus fleets, the question is no longer whether the transition to quiet, clean urban mass transit will occur: It’s already happening.

Roughly 5,000 public transit buses are purchased each year in the U.S. With more than 60 agencies demonstrating or deploying electric buses — 1,000 already are on order, with active requests for proposals for hundreds more — the number of fossil-fueled vehicles is about to shrink dramatically.

The benefits are far-reaching: new options that include electric- and hydrogen-powered buses will provide cleaner air and a better experience for passengers and drivers, while supporting the imperative to cut greenhouse gas (GHG) emissions.

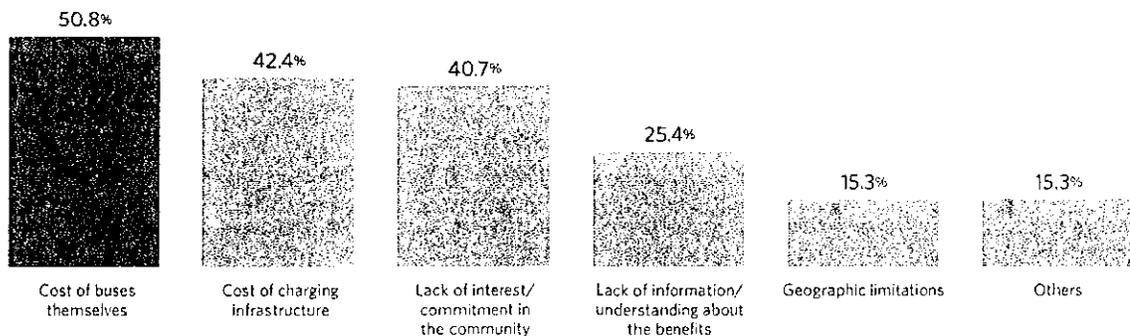
Combustion engines contribute heavily to pollution in the urban environment. According to the U.S. Environmental Protection Agency, transportation accounts for more than one-quarter of the nation's GHG emissions and is overtaking the power sector as the top GHG contributor as more renewables come online. Removing fossil fuels from mass transit will go far in reducing that carbon footprint, making electrification of mass transportation a top priority for city officials and utilities.

But as EV use continues to grow and more high-power capacity is needed, questions remain: What are the remaining roadblocks? What role will municipalities and transit agencies play in the shift from diesel to electric? Who will develop the necessary infrastructure to support the charging of EV fleets and can they keep up with the growth?

Benefits Clear, Funding Is Not

Although the benefits are strong, cost concerns continue to tamp down enthusiasm over fleet EVs. When industry leaders were surveyed on the main barriers preventing the adoption of electric city bus systems, more than one-half of respondents said they see the cost of fleet investment as the biggest obstacle, according to Black & Veatch's "2018 Strategic Directions: Electric Report survey" (Figure 1).

Figure 1. What are the main barriers keeping your community from adopting an electric city bus system? (Select all that apply)

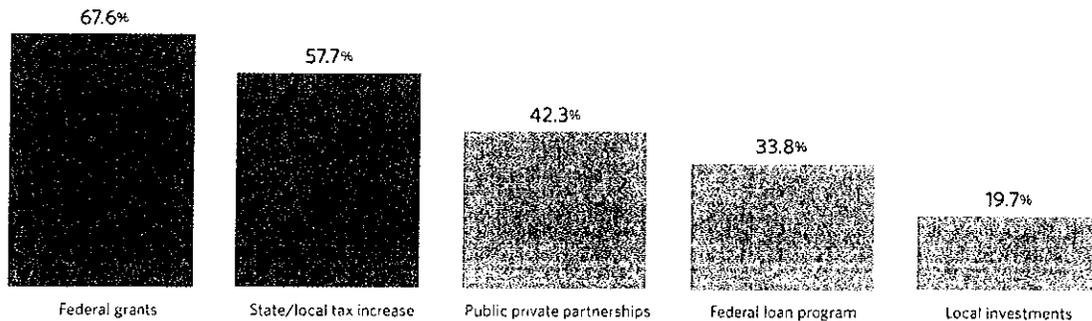


The report, part of an annual series that surveys utility, municipal, commercial, and community stakeholders, also found that 42% of respondents are concerned over the cost of the charging infrastructure necessary to support fleet needs.

That said, federal grants — identified by the majority of respondents as the most likely approach to fund an all-electric transit system — appear to offer some salvation. The U.S. government is

doing its part to support the drive to zero-emissions transit, providing tens of millions in “No/Low-Emission” grants for vehicles and supporting infrastructure. Other financing approaches include innovative public-private partnerships, federal loan programs and, to a lesser extent, local investment (Figure 2).

Figure 2. Which of the following methods would most likely be used to fund an all-electric transit system in your area? (Select all that apply)



While fleet EVs can command high upfront capital investment, it’s critical to note electric buses have lower maintenance costs than their diesel or hybrid counterparts. Much of this is due to the benefits of electric drive’s regenerative braking, which virtually eliminates brake pad replacement and electric motors that don’t require costly engine rebuilds that plague their internal combustion engine counterparts.

And as with any new technology gradually facing mainstream acceptance, costs continue to come down. Not that long ago, electric buses cost around \$1 million each; today, this cost has decreased to approximately \$750,000. With total lifetime cost of ownership already on par, we expect to see upfront cost parity — driven by economies of scale as demand and production volume increases — just a few years away.

EVs Are on Rise; Can the Charging Network Keep Up?

Many utilities — large and small — struggle to manage their region’s daily load requirements. Now imagine adding a network of new, high-powered charging stations, which can deliver up to 350 kilowatts (kW) of power — seven times today’s standard 50kW capacity. Bringing online an entire network of these chargers could easily overload a power grid, not to mention alter a utility’s overall load profile and stretch its ability to plan for grid upgrades and operations.

Although the benefits of EVs are profound — from cleaner air to lower vehicle costs — adding large numbers of them to the grid is raising questions about grid stability and energy management. To make large-scale electrification a reality, utilities need to start thinking about how they can scale up power infrastructure to meet increased charging demands.

Understanding EV Behavior

According to Black & Veatch's 2018 Smart Cities & Utilities Report survey, 60% of utilities see studying EV charging ownership, behavior and rate impacts to be the most critical step when preparing for increased adoption. Fifty-one percent said "predicting areas of likely adoption" is second-most-important, showing a strong need for utilities to better understand the EV market, including when, where and how users charge their vehicles.

Utilities noted that other important activities include: incorporating EVs into each aspect of the business (43%), working with stakeholders to identify locations for large and/or high-speed charging infrastructure deployments (43%), and evaluating the distribution grid to determine energy supply (37%).

Deploying Managed Charging

To help control energy distribution at the charging hubs, 77% of utilities plan to adopt a managed charging approach. Managed charging — also called VIG, or intelligent, or smart charging — relies on communication signals sent by the utility through the charging hub that allows the utility to remotely control charging levels, turning charging up, down, or even preventing it altogether if a high-load event is occurring on the grid.

Utilities can use this control to turn charging hubs into a flexible load source to gain capacity, to reduce load in the event of an emergency, or even absorb excess energy from renewable energy resources like solar and wind. Managed charging might even allow utilities to generate revenue — for example, by enabling them to increase the load they serve, better balance grid demand and supply, and even integrate renewable energy from wind and solar. It can also help utilities provide grid services in wholesale electricity markets and spur new grid and charging infrastructure.

Planning for the Future

No matter which approach utilities decide to take in the EV game, it will be up to the many entities and stakeholders — from automakers to charging providers, and utilities to policymakers — to work together to develop solutions that support EV adoption and charging. As EV adoption rates continue to grow and high-power capacity is needed, there's no time like now to address the issue.

Ensuring Available Charging

Previously, battery capacity was a limiting factor in the widespread adoption of fleet EVs. But battery and vehicle technologies continue to advance, with some vehicle batteries already smashing the 200-mile-per-charge barrier. Now one of the main challenges to hastening broader EV adoption lies in changing customer perception of miles traveled, range, and reliability.

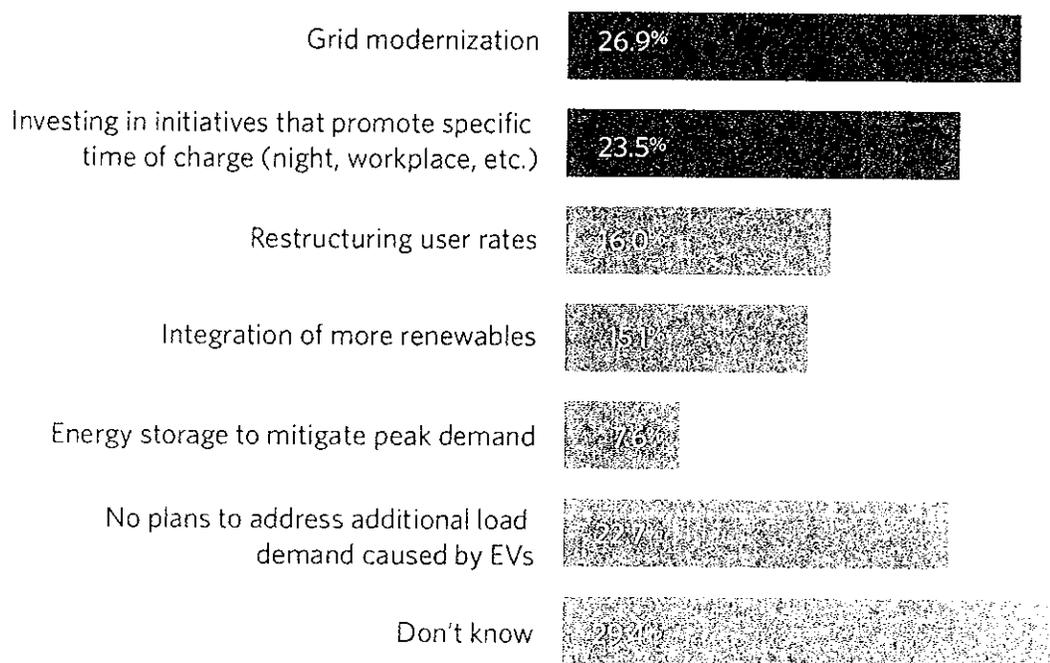
With battery technologies ready for demanding transit duty cycles, attention is now focused more heavily on having the widespread availability to EV infrastructure. Electrified mass transit has

significant charging demands, and cities must determine how to scale charging infrastructure and manage increased electric loads.

Currently, grid modernization efforts and managed charging top the list of strategies that utilities will use to manage the additional load demand on the grid (Figure 3).

But enabling a robust EV charging infrastructure for vehicles requires cross-cutting industry, municipal, and utility partnerships. Public transit agencies and utilities must develop infrastructure roadmaps to guide investment from pilot studies through mass deployment of on-route and depot charging scenarios to match their unique system and grid requirements. The battery charging demands of large buses — and fleets of those buses — will create substantial loads for the grid that will necessitate distribution grid upgrades.

Figure 3. How do you plan to manage the additional load demand on the grid caused by EV adoption? (Select all that apply)



These capital-intensive projects, such as new feeders, medium voltage service delivery, and substation upgrades, require careful coordination with the host utility and can have lead times measured in years to engineer, permit, and construct. Utilities and cities should begin preparations now to design, finance, and manage this new infrastructure.

Working Towards the Future

Improvements in battery technology, longer battery ranges, lower costs, and increasing consumer

confidence continue to encourage a significant increase in EV sales in the U.S. For transit providers and the communities they serve,



While fleet EVs can command high upfront capital investment, it's critical to note electric buses have lower maintenance costs than their diesel or hybrid counterparts.

Santa Clara VTA

what resembles exponential growth in adoption presents new challenges, requiring them to proactively and creatively engage now.

As the preference for EVs — from passenger cars to metro buses and enterprise fleets — continues to grow, expect to see greater pursuit and acceptance of electrified mass transit and the efficient, environment-friendly transportation solutions it provides.

CITYLAB

California Transit Agencies Resist a Gas Tax Repeal

By: Laura Bliss

Nov 5, 2018

Proposition 6, an effort to repeal a major fuel fee increase, could set back the state's ambitious climate goals.

In the spring of 2017, California Governor Jerry Brown and the state's Democratic lawmakers pulled out the stops to do nearly the least popular thing for politicians to do: They raised the gas tax by 12 cents per gallon.

The increase didn't just cover gasoline. Diesel fuel also got hit with an extra 20 cents per gallon, and annual vehicle registration fees got bumped from anywhere between \$25 to \$175, depending on the car's value. To raise roughly \$5 billion per year for statewide transportation infrastructure repairs and improvements, Senate Bill 1—which was packed with earmarks for communities in the rural Central Valley, which tend to get short shrift compared to urban regions when it comes to state transportation funding—gave California the second-highest gas tax nationwide, along with some of the priciest unleaded in the land.

But for how long? On Tuesday, California voters will revisit SB 1 with Proposition 6, which would roll back last year's fuel tax and vehicle fee increases, in addition to requiring voter approval for such hikes in the future, even those approved by governors and legislators.

"This is not just about roads," Carl DeMaio, the chairman of the Yes on Proposition 6 campaign, told Sacramento's Capital Public Radio in September. "This is about cost of living. And a 'yes' vote on Prop 6 gives an immediate cost of living reprieve for working families who are barely making ends meet as it is."

The effort has been about more than that, though. California's conservative leadership hopes that the gas tax can galvanize GOP voters in this heavily Democratic state. That appears to be why Republican gubernatorial candidate John Cox—who's been given little chance of winning over Democratic candidate Gavin Newsom—has made the issue a focal point of his campaign. In tightly contested districts around San Diego, Orange County, and the San Joaquin Valley, where Democratic contenders are challenging Republican seats, that is a reason to watch how the ballot measure performs.

So far, early turnout by Republicans in some of those areas has been strong. But statewide, Proposition 6 is facing long odds. Supporters of the gas-tax rollback have been far outspent by its opponents, including outgoing Governor Jerry Brown, who has funneled tens of millions of dollars from campaign funds to defeat the initiative. (Brown also made a rare pre-election appearance—his only campaign cameo this year—at a Bay Area rally last week, specifically to slam the initiative.) Recent surveys by the Public

Policy Institute of California and the Institute of Governmental Studies at the University of California, Berkeley indicate most voters plan to veto the proposal. By now, DeMaio has all but admitted defeat.

That is likely a positive sign for the future of transportation in California, on which Proposition 6 is something of a referendum. Though this proposition is called a “repeal,” that isn’t quite accurate, since the tax would return to its previous rate if this measure passed. But it would serve to eliminate a rare source of sure funding—some \$54 billion over the next decade—for the state’s deteriorating mobility infrastructure. Since SB 1 passed, about two-thirds of its proceeds have gone to road repairs and highway improvements, and the rest to mass transit. Already, more than two dozen road maintenance and safety improvement projects for drivers, cyclists, and pedestrians have been completed by the California Department of Transportation, while cities and counties have received hundreds of millions of dollars in matching funds for local projects. “Our pavement condition is deteriorating rapidly, and the \$850,000 we got this year is not chump change to us,” one official from Turlock, a city in the upper Central Valley, told state legislators at a hearing on the repeal initiative in June.

While most of SB 1’s annual revenues go to highway and road repairs, about \$750 million is set aside for public transportation. An additional \$100 million per year pays for pedestrian improvements and cycling infrastructure, projects meant to nudge Californians out of automobiles when they need to get around. After all, Californians are as addicted to private cars as the next American, as Ned Resnikoff, a journalist and graduate student in public policy at UC Berkeley, explained in a New York Times op-ed last month. The state may lead the U.S. on scaling back carbon emissions, but transportation emissions are on the rise there as they are nationwide. More car-free trips would help California stay on track towards its climate goals.

Transit agencies around the state have been accordingly vocal about what cutting these funds would mean for their work. L.A. County Metro is in line to receive funding through SB 1 for several significant construction efforts, including a train line that would help connect airport travelers to LAX, a transit line that cuts through the traffic-clogged Sepulveda Pass, and tons of freeway repair work. Metro predicts that these projects, many of which it hopes to complete by the 2028 Olympics, could be delayed by three to five years if the repeal is passed. Elsewhere, transit service would have to be eliminated: The Orange County Transportation Authority has said it would have to reduce bus service by 11 percent if the repeal passes, while up north in Monterey County, some 26 bus routes and para-transit lines could be threatened. In the Bay Area, BART would be particularly hard hit by a gas tax rollback, as it would increase the operating budget gap it is already facing to an estimated \$500 million.

Without the extra tax revenues, how would the state pay for such projects, or indeed, fix the potholed highways that cost California drivers an estimated \$843 annually in extra gas and vehicle repairs? Supporters of Proposition 6 have argued that state legislators have been squandering many of the proceeds from SB 1 in the first place, “diverting”

the funds from roads to projects such as bike lanes and transportation job training. (A Politifact analysis in May 2017 rated a similar claim as “mostly false”—such uses are valid under the law.) Perhaps in part to address the question of where the rest of funding would come from, in late September, Proposition 6 supporters came up with another initiative, this one for 2020, that would cancel the state’s controversial \$100 billion high-speed rail project and require that all gas tax proceeds be used for roads alone.

That effort is also probably unlikely to succeed, even if Proposition 6 flops, says Robert Cruickshank, a transportation policy consultant and rail advocate who authors the California High Speed Rail blog. The project—on which construction is underway in parts of the Central Valley—has been beset by cost increases, construction delays, engineering issues, and countless lawsuits. But previous attempts by citizen groups to cancel the “bullet train” via ballot measure have failed, and support today remains about as evenly divided today as it was in 2008, when California voters passed a \$9.9 billion bond to kick off the plan. “People either love or hate it, but there is little back and forth,” said Cruickshank.

The Atlantic

The Bus Is Still Best

Ride-shares aren't the most efficient way to move lots of people around cities.

By: Jarrett Walker

Oct. 31, 2018



Josh Edelson / Getty

A recent conference I attended featured a panel called “Microtransit: The Fight Against Congestion.” *Microtransit*: It sounds as though a genius has shrunk public transportation in a laboratory, making it adorable.

In some cases, shrinking vehicles is a great idea. Cities don't have room for everyone's car. With shared electric scooters, and improvements to bicycle access, people are finding new ways to move without taking up much more space than their body does.

So it feels right that shrinking transit might be a good idea, too, maybe into little vehicles that will come to your door on demand. But it's not. The best way to get the most people around a city efficiently and cheaply isn't nearly as sexy or high-tech: It's fixed-route buses.

Microtransit, or “Uber for public transit,” as some advocates call it, is a new name for an old idea: “dial-a-ride,” or demand-responsive transit. A van

roams in a neighborhood. People can call a phone number and request a vehicle to take them where they want to go, or at least to a transit hub. The van might stop for others along the way, too. There are hundreds of these services in the United States. As a transit-planning consultant, I have been designing and redesigning dial-a-rides for 25 years.

The only new feature of microtransit is smartphones. Apps let customers reserve trips on shorter notice than before, and without making a phone call. But microtransit is about as inefficient as dial-a-ride always was, for reasons that no technology will change.

Visualize a low-density suburb, with requests scattered over a wide area. How many people's doors can a driver get to in an hour, including the minute or two that the customer spends grabbing their things and boarding? The intuitively obvious answer is the right one: not very many. An Eno Foundation report promoting microtransit could not cite a case study doing better than four boardings an hour of service. John Urgo, the planner of demand-responsive service for AC Transit in Oakland, California, has said that seven boardings an hour is "the best we hope to achieve." Few fixed-route buses perform that poorly. Across sprawling Silicon Valley, for example, fixed-route buses carried 12 to 45 people an hour in 2015. In a dense city such as Philadelphia, the number can exceed 80. I've found similar figures in all of the 50 or so transit agencies that I've studied over the years.

Even so, it seems like small vans would be cheaper to run than big buses to the casual observer. But until it becomes fully automated, the operating cost of all passenger transport is at least 70 percent labor. The driver's time is far more expensive than maintenance, fuel, and all the other costs involved.

In almost every public meeting I attend, citizens complain about seeing buses with empty seats, lecturing me about how smaller vehicles would be less wasteful. But that's not the case. Because the cost is in the driver, a wise transit agency runs the largest bus it will ever need during the course of a shift. In an outer suburb, that empty big bus makes perfect sense if it will be mobbed by schoolchildren or commuters twice a day.

Cost efficiency only comes from shrinking drivers—that is, paying them less. But an agency can cut pay and benefits only so much while

maintaining quality. The transit system in my hometown of Portland, Oregon, is full of friendly drivers who've been selected and trained to be graceful under stress. You cannot expect that skill at minimum wage—a Portland bus operator can make more than \$60,000 per year.

Superficially, it might seem that offering riders a more convenient service—especially one that comes directly to their door—would increase ridership. And for individual riders who don't use buses or rail for whatever reason, it might. But for a municipality with a fixed budget for service, shifting resources from fixed routes to microtransit is a way of *lowering* ridership overall, not increasing it. To put it another way, the “to your door” convenience offered by microtransit is so expensive per rider that it cannot possibly scale to the volumes of people traveling in a city. It can only be a special service for a small number of people.

That doesn't mean these services are useless. Every U.S. transit agency runs low-ridership services, called coverage services, for non-ridership reasons. If you planned a network solely for ridership, it wouldn't go to places where density is very low and walking is too difficult. Transit agencies run coverage service in response to a need for transit (such as low-income people living in a hard-to-serve place) or an entitlement to it (*We pay taxes, too, so you should serve us*). Dial-a-ride or microtransit is one way to provide coverage services. They are also a useful way to provide disabled persons with specialized services, which are mandated by civil-rights law. But they will never be high-ridership tools for an urban transit agency.

In my work as a transit planner, I try to help transit boards think clearly about what balance they want to strike between ridership goals (putting service where lots of people will ride) and coverage goals (providing a little service to everyone). Many citizens demand coverage service and complain if it is removed, but the more coverage service is offered, the less ridership a municipality can expect under a fixed budget. Finding the right balance is a painful process of balancing competing demands, which is the job of elected officials or the board members they appoint.

But while I'm trying to help leaders think clearly about reality, the microtransit marketers are whispering sweet nothings in their ears. Consider this example from the global-transit operator RATP Dev USA:

Let's face it, your community can offer clean, efficient, wide-ranging public transportation, but if the riding public can't get to it or if it doesn't service a specific location—at the time they need to get there—they won't use it. Enter microtransit. It opens up a world of options for your passengers. And, rather than compete with traditional fixed-route transit, it enhances it ... Because it uses smart software platforms to manage multimodal forms of transport, riders can use their smartphones to search, book, plan, and pay for an entire trip.

This idea might sound good, but it can encourage denial about the real issues facing a transit agency. Like the cost of labor, even though that's most of a transit agency's budget. Or how people will use microtransit to get to fixed routes if the fixed routes have been cut or neglected to fund the microtransit. Or why people who need a ride to a fixed route stop are more important customers than those who get there under their own power. The dream of connecting services to smartphones risks taking attention away from other, more important transit goals.

To succeed, microtransit would have to help people get around cities better, not just make them feel good about hailing a ride on a phone. Full automation of vehicles, if indeed it ever arrives, might solve the labor problem—although it would put thousands of drivers out of work. But the congestion problem will remain. A city is a place where many people live close together. The problem of urban transportation is a problem of sharing space.

When you drive alone (or take Uber alone) in a gridlocked street or freeway, you are taking more than your fair share of the limited space. When stuck in traffic, you are blocking others from moving freely.

If cities want to move people faster than walking while allowing them to take up only their fair share of space, two options arise. One is to use a vehicle that's not much bigger than the human body, such as bicycles and scooters. Those tools work well for certain people in particular circumstances, but not for everyone. The other option is to share the ride in a vehicle. If space is really scarce, that vehicle will have to carry lots of people. In most cases, riders will have to share a vehicle with strangers, people who are not traveling for the same purposes or even to the same places. That's what public transit is.

Fixed public transit deploys large vehicles flowing along a set path, and riders gathering at stops to use them. That way, the vehicles can follow a fairly straight line, and they don't need to stop once for every customer. That is what makes them worth walking to get to. It is one of the best ideas in the history of transportation.

And walking is key to it. Out in low-density suburbs, residents can also drive to fixed-transit stops. But in the dense city, there's no room for that. The microtransit promise of "service to your door" is a promise to abolish walking, and yet walking is the essence of how people share precious space.

Those who prefer not to walk should be able to pilot their own tiny vehicles: a bike, a scooter, or whatever gets invented next at that scale. But the space-efficient solution, like the labor-efficient one, won't require a driver to transport just you and a couple of others. Citizens should expect to pay full price for that.

So what technologies make sense in public transit? Efficient transit networks are made of many technologies, each the right one for its own situation. Rail is for high-capacity markets, where you need to move hundreds of people per vehicle. Ferries and aerial gondolas overcome certain obstacles. But everywhere else, the bus is the thing that's easiest to make abundant. Because labor is the main limit on their quantity, they can be much more abundant after full automation.

If the buses are terrible in your city, you may think that buses are terrible in general. In truth, a city's bus service is as good as its leaders and voters want it to be. Where voters have funded better bus services and cities have worked to give them priority, as in Seattle, ridership has soared.

But most U.S. cities have a large unmet demand for frequent bus service, which is why cities investing in more frequent service have seen ridership rise. Outside the largest metro areas, you can also verify this fact by comparing your city to the most similar one in Canada. There, you'll usually find much more bus service in a city that looks a lot like yours, with rider numbers that are higher than your city's and growing faster. Fewer people are forced to drive in those cities, too. Americans could share that benefit, and without the need for technology. Just run as much bus service as Canada does, and demand that it have the priority it needs to succeed.

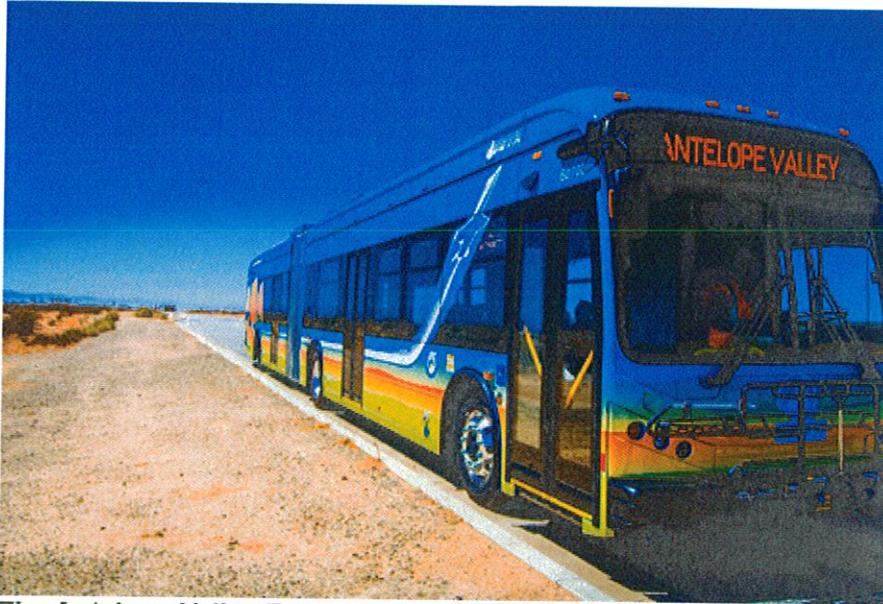
The starvation of high-ridership public transit in America is a choice, one that Americans don't have to make. I work in cities all over the developed world, but my U.S. clients always have the poorest transit budgets, requiring the most painful trade-offs. They can't afford to run the frequent and reliable fixed-route services that would do well, so they are forced to run poor service, yielding low ridership, feeding the impression that transit is pointless. Yet rather than taking the next steps in a known path to success, some leaders are chasing whatever distraction the tech industry is selling.

Technology companies have brilliant solutions to important problems. For the problem of emissions, they offer electric vehicles. Autonomous vehicles of the future, and active-safety systems of today, make vehicles safer. Apps make transit services easier to navigate and pay for. But those are different problems from the problem of sharing space. The technology industry's marketers can mix these issues together, dangling an electric, autonomous future before the citizenry, but if their vision hasn't solved the problem of sharing space, it is not a vision of a functional, inclusive city. They will try everything else first, but in the end, the only solution will be the bus.

October 30, 2018

INDUSTRY NEWS

New Commuter Bus Routes Will Service Local Aerospace Companies



The Antelope Valley Transit Authority Board of Directors recently created three new bus routes that will provide service to some of the North County's largest employers in the Antelope Valley and Santa Clarita area.

On September 25, the **Antelope Valley Transit Authority (AVTA)** Board of Directors approved the agency's New Employment Center Commuter Services, creating three new bus routes that will provide service to some of the North County's largest employers in the Antelope Valley and Santa Clarita area. The new commuter services, to be implemented within the next 90 calendar days, will create the Route 747 service to the Edwards Air Force Base Installation, Route 748 servicing the Mojave Air and Space Port and The Spaceship Company, and Route 788 servicing aerospace manufacturers and industries in the Santa Clarita area. The goal is to encourage aerospace-based workers to make the positive change to using public transit as a means of getting to work.

"The Antelope Valley has a rich history in aerospace development, and we are proud to partner with these organizations to help support their roles in the advancement of state-of-the-art aviation," said AVTA Board Chair Marvin Crist. "These employers have thousands of employees, many of whom reside here in the Antelope Valley, and these new services will provide an environmentally friendly mobility option to them that is also cost-effective."

The employers that will be served by the new routes are all eager to have the new services implemented as soon as possible, and each face unique challenges that they are hoping the

bus service will help alleviate. For example, the companies in the Santa Clarita Industrial Center endure a constant turnover of employees who commute in from the Antelope Valley, due to both the high cost of gasoline and the amount of time it takes to drive. With AVTA's recent addition of free Wi-Fi service on all of its new electric buses and all existing commuter buses, workers can use their time more productively while enjoying the ride, just one of the many ways AVTA continues to add value and efficiency to the rider experience.

At Edwards Air Force Base, the 412th Test Wing oversees the installation's day-to-day operations, providing support to more than 10,000 personnel on a base of 482 square miles. The security protocols in place require that every person and every vehicle entering the base be carefully screened, and can result in extensive lines at the entrance gate. The buses will help solve that issue by eliminating dozens of cars from that busy queue daily, saving base employees significant time in the process.

"Since the beginning of the current fiscal year, AVTA has rededicated its focus and outreach on providing improved mobility services and an efficient route system that serves our community and employers' transportation needs", said Macy Neshati, AVTA Executive Director and CEO. "We've conducted successful coordination meetings with representatives from each of these employment centers, and each has expressed a desire and a willingness to partner with AVTA to provide safe, clean, and cost effective commuter and transit services to their employees.

The three-month period prior to full implementation will allow staff to finalize routes and fare structures, develop service schedules and brochures, and conduct community and employer outreach and travel training. AVTA is also working to develop a similar program with the Air Force Plant 42 Production and Test Facility in Palmdale.

San Diegans Cash in on Free Ride Day as Transit Ridership Spikes

Tens of thousands of new commuters realized the benefits of taking transit during the region's first ever Free Ride Day, earlier this month, as the Metropolitan Transit System (MTS) experienced a ridership spike of nearly 47,000 trips.

"Free Ride Day was a great success and showed that San Diegans want public transit," said MTS Board Chair **Georgette Gómez**. "As we move forward, we need to invest in the things that will make transit an everyday choice."

MTS and the North County Transit District jointly held Free Ride Day and provided free trips on buses, the Trolley, COASTER and SPRINTER.

Cities, universities, the U.S. Navy, business groups, and many other stakeholders came together in support of Free Ride Day as the region strives to meet our climate action goals. Free Ride Day was held in conjunction with the SANDAG iCommute program to promote National Rideshare Week and to educate people about transportation choices available in the San Diego region.

FTA Presents MST With Outstanding Public Transportation Service Award

This month, **Carl Sedoryk**, General Manager/CEO of Monterey-Salinas Transit (MST) received recognition for MST's service to Monterey County's rural communities.

At its 23rd National Conference on Rural Public and Intercity Bus Transportation held in Breckenridge, Colorado, the Federal Transit Administration (FTA) presented Sedoryk an Outstanding Public Service Award in recognition of MST's superior contribution to "providing access to education and healthcare, improving efficiency through innovative practices and supporting coordinated planning efforts in rural communities." **K. Jane Williams**, Acting FTA Administrator presented the award.

Upon receiving the award, Sedoryk said, "I am honored to receive this award on behalf of the hard-working employees of MST and the communities we serve. It shows that our new and growing services to the rural communities of southern Monterey County, and special Mobility services for seniors, veterans, and persons with disabilities, are a model for similar communities across the nation."

Rural communities are important to Monterey County. According to the Farm Bureau, nearly one in four households in the area relies on income related to agriculture which supports 76,054 jobs. And, Monterey County is important to the country. Crops grown in the Salinas Valley, known as the Salad Bowl of the World, supply a large percentage of the nation's total produce.

Eno Center for Transportation

Op-Ed: Addressing the Current and Future Challenges of Public Transit

By: Paul Lewis

October 25, 2018

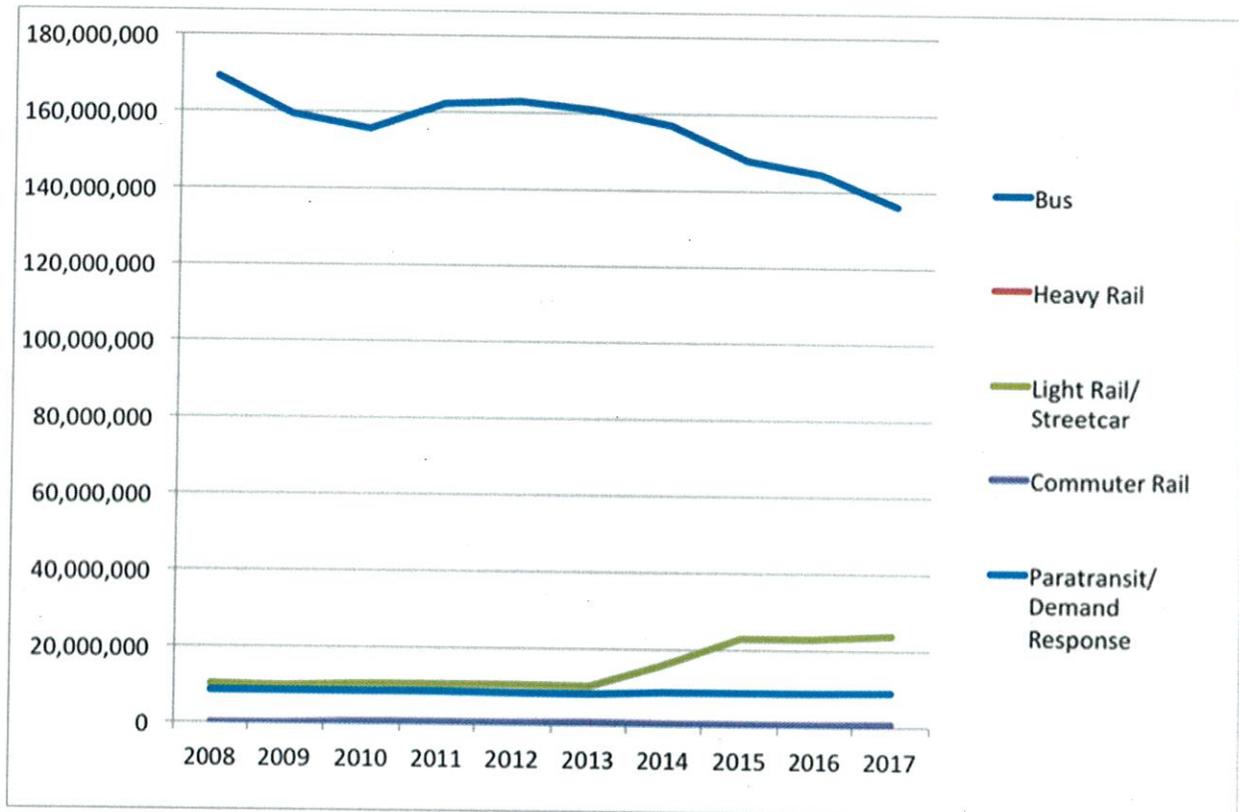
Last week I was invited to speak at and participate in the Minnesota-Wisconsin Public Transportation Conference and Expo in La Crosse, WI. Transit agencies in attendance ranged from Metro Transit in the Twin Cities region to dozens of small, rural providers from both states. Each size and shape of agency has its own challenges and problems, but a few underlying themes kept emerging throughout the conference.

All face financial challenges, which routinely came up during sessions. Because most agencies only expect little, if any, new federal money, attendees turned the conversations toward innovative ways to seek funding from voters, local councils, and their state governments. They also want to innovate and provide attractive, modern service to compete in the full mobility market. Multiple conversations revolved around “on-demand” and “flexible” transit to meet changing rider expectations.

I opened my presentation with a quick overview of ridership statistics from the National Transit Database. After substantial ridership increase from the mid-1990s, the national public transit ridership trend switched course after hitting a peak in 2014. Data shows that total unlinked passenger trips declined 5.4 percent nationwide from 2014 to 2017. The drop was more dramatic for bus service, which lost more than 9 percent of its passenger trips over the same period.

Agencies in Minnesota and Wisconsin face the same trend: a decline of 7 percent for total trips, led by a 13.3 percent dip in bus riders from 2014 to 2017. New investments in light rail in the Twin Cities are boosting transit trips, as shown in Figure 1, but not making up for larger losses.

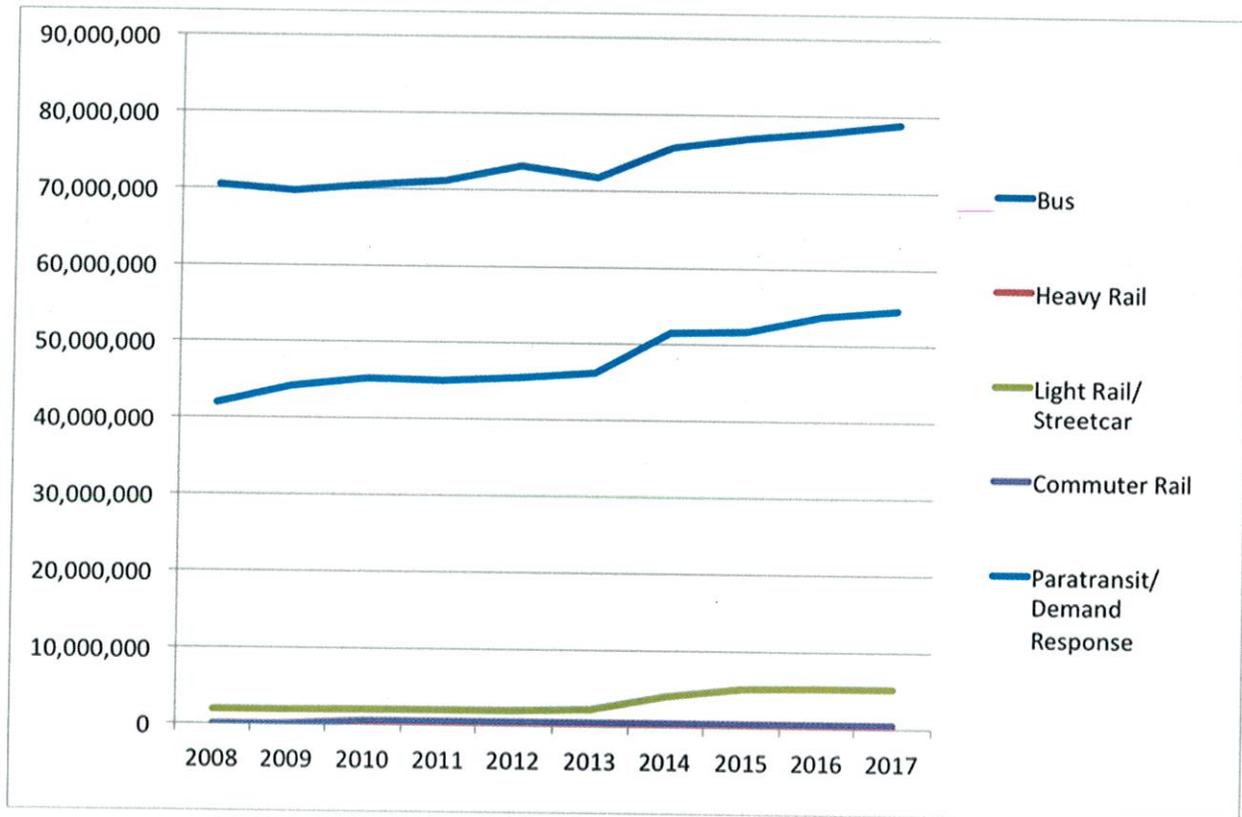
Figure 1: Unlinked Passenger Trips, Wisconsin and Minnesota



Source: *Eno Analysis of National Transit Database*

Inversely coupled with the declining ridership, transit vehicle revenue miles have risen. Despite this simultaneous increase in the total number of vehicle miles, agencies are losing riders. Agencies in Wisconsin and Minnesota added 4.1 percent more revenue miles of bus service in the same 2014 to 2017 period where they lost 13.3 percent of their riders, shown in Figure 2. Some regions, including Seattle, Houston, and Rochester, MN have bucked the nationwide trend. Nevertheless, the majority of agencies faces this dilemma and wants to know how to stop, and reverse, the ridership slide.

Figure 2: Vehicle Revenue Miles, Minnesota and Wisconsin



Source: Eno Analysis of National Transit Database

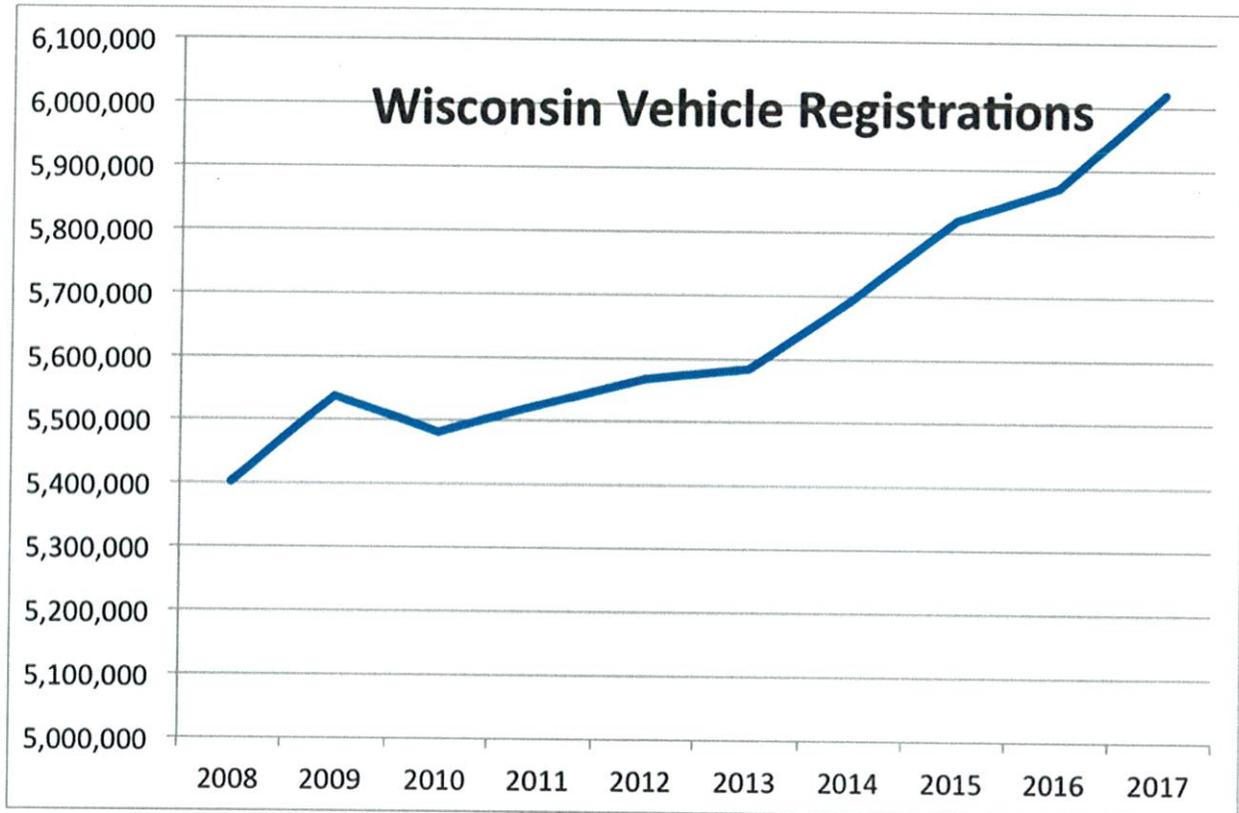
Several studies have attempted to uncover the biggest reasons why transit ridership is declining. A recent report cited competition from new mobility services such as Uber and Lyft as a culprit, particularly in the largest cities. The American Public Transportation Association lists several potential causes, including buses stuck in increasing congestion, reduced customer loyalty, and a decrease in perceived safety. But these factors don't always apply in the smaller and medium-sized city homes of the bulk of the transit systems in Wisconsin and Minnesota.

Perhaps a more compelling reason for ridership declines is that people are buying more cars. A recent study from the University of California Los Angeles found that bus ridership declines in Southern California are most strongly correlated with increased auto ownership, with the authors calling cars the "silver bullet."

A comparison of bus declines to vehicle registrations in Wisconsin, shown in Figure 3, confirms that suspicion halfway across the country. (Minnesota

has similar geography and economy, so vehicle registrations are similar). Between 2009 and 2013, Wisconsin added 46,384 vehicles to state roads. From 2013 to 2017, registrations increased by 433,726. Assuming each of those new cars makes only two trips during workdays, those commutes far exceed the total number of bus trips lost during the same time period. Transit agencies must adapt and respond to the upward trend of car ownership.

Figure 3: Vehicle Registrations in the State of Wisconsin



Source: Wisconsin Department of Motor Vehicles

Conference participants discussed how they might make public transit more competitive with the automobile. SouthWest Transit is offering “SW Prime,” a microtransit option for riders outside of Minneapolis. This service’s flexible bus routes can be requested at any time and take riders directly to their destinations, pooling with other riders traveling in the same direction. However, that service attracts only four riders per hour per vehicle, and the highest-performing microtransit services have a ridership maximum of about five riders per vehicle-hour. While this can be important for low-density areas, it is an expensive way to significantly boost ridership.

Conferees also discussed autonomous vehicle shuttles, but none of the technologies available to date can provide reliable service without the use of an on-board attendant, limiting its cost-effectiveness.

To address ridership declines, agencies need to focus on improving current systems beyond adding more vehicle-miles. With federal cash sparse for new streetcar and light rail lines, agencies will need to invest in rethinking the bus network entirely. Proven tactics, such as bus network redesigns, priority lanes, and signal coordination can help make the bus more reliable, convenient, and quicker than a personal car.

Agencies should also expand their partnerships. Tech firms can add value by optimizing routes, streamlining payments, and coordinating an agency's network with multimodal options. By reaching out to employers to coordinate transit passes and plans, agencies can boost ridership and reduce the need for businesses to supply expensive parking. But partnerships within the public sector also yield innovation. Civic institutions and interagency exchange can enable staff to work jointly on similar problems and share insights. Conferences, like the one in La Crosse, are great way to meet counterparts, and future collaborators, at peer agencies facing the same challenges.

Transit agencies also need to think creatively beyond traditional transit. The newest tech trend of dockless electric scooters might be a way to attract riders to and from the system. Even state and local highway agencies could be welcome collaborators in addressing the growing demand for automobiles on roadway, mitigating congestion, and leveraging transit's efficiencies to improve access and decrease trip times for the overall network. Bus lanes, parking regulations, and roadway pricing are multimodal solutions that require non-traditional, cross-agency partnerships.

Public transportation will remain an essential part of our economies and transportation system, but it must leverage its strengths and evolve to meet today's challenges. Agencies at the Minnesota-Wisconsin conference showed an appetite for fresh thinking, and should be encouraged to test and share new approaches with others around the country.

SB1

&

PROP 6

The Mercury News

California Voters Reject Gas Tax Repeal

By: Erin Baldassari

November 6, 2018

California voters on Tuesday rejected Proposition 6, a measure to repeal a recent increase in the state's gas tax and one that, in many ways, determines the fate of California's roads, bridges and transit.

The measure, which lost by a nearly 11 percentage points, would have repealed a law passed last year, called SB1, that increased the tax on gasoline by 12 cents and the tax on diesel by 20 cents per gallon. The same law also increased registration fees by an average of \$50 per vehicle and imposed an additional \$100 fee for vehicles that don't use gasoline.

At stake was not just the estimated \$5.4 billion annually from those taxes and fees to pay for road, highway, bridge and transit repairs, but also how the state could raise money to pay for transportation improvements in the future. Supporters of the measure painted the repeal initiative as a David-versus-Goliath battle pitting the needs of working families against Sacramento special interests.

"It's about whether working families will be given some breathing room and whether we can address the high cost of living in California," said Carl DeMaio, a former San Diego city councilman who led the repeal effort. "That's real money."

Opponents of the repeal, however, characterized it as a cynical political ploy to get more Republicans to vote in midterm elections — GOP gubernatorial candidate John Cox mentioned the measure in nearly every stump speech — and one that would have dangerous consequences for Golden State motorists.

Prop 6 would have required two-thirds of voters to approve any increase in fuel taxes or vehicle fees in the future, making it all that much harder to pay for roads, rails, bridges and buses, said Carl Guardino, a member of the California Transportation Commission, who opposed the repeal. Before SB1 was approved, the state was facing a \$57 billion funding shortfall over the next 10 years to rehab the state's crumbling roads and bridges.

"California voters are smart, and they don't like to be deceived," Guardino said. "The more it became clear what was at risk — the safety of our highways and

bridges, the loss of funding for traffic relief and transit alternatives, the ongoing frustration of potholes and a lack of road and street maintenance — the more people saw through it.”

And, in the gridlocked Bay Area, voters were staunchly in favor of keeping the taxes and fees in place, with a supermajority of voters opposing to the measure. Across the entire Bay Area, 69.6 percent of voters rejected the measure, with opposition to the repeal highest in San Francisco County, where 82 percent of voters opposed Prop 6, and lowest in Solano County, where 56 percent of voters rejected the measure.

Bob Braun, 73, of Martinez, said the money is critical for ongoing maintenance and repairs.

“I think it’s crazy that people will pay money to fix their cars, but they won’t pay money to fix the streets,” he said. “There have been some improvements on the streets that we typically use, but in general, they need maintenance.”

The state’s transportation commission, which reviews and oversees transportation funding in the state, has already approved more than 9,200 projects across the state funded by SB1. Of those, 6,500 have already started construction, and roughly half of those were at risk of being delayed or defunded if Prop 6 passed, Guardino said.

Among the projects in the Bay Area at risk of losing funding were \$730 million to help extend BART to downtown San Jose, \$318.6 million for BART to buy new train cars so the agency can carry more passengers by running longer trains, \$233 million for toll lanes on Highway 101, \$164 million to help electrify Caltrain, \$150 million for more AC Transit buses, and \$67.5 million in pedestrian and bicycle improvements.

San Jose Mayor Sam Liccardo lauded the measure’s defeat, saying it will enable the Santa Clara Valley Transportation Authority to continue building its 6-mile BART extension underneath the city’s downtown.

“I’m grateful Californians recognize it is time to stop kicking the can down the road and start investing in infrastructure projects like BART,” he said.

The state could achieve all of its road, bridge and highway plans, including what SB1 funded, if it dedicated 100 percent of the gas tax to performing repairs, DeMaio said. His campaign proposed an alternate plan that allows legislators to choose between using an estimated \$2.3 billion surplus to retain Caltrans’ staff or

to use that money, without staff, on transit, bicycle and pedestrian improvements, research, workforce training or other efforts.

But, even before Tuesday's election, DeMaio and supporters of the Prop 6 campaign had already vowed to continue the fight, beginning with recalling Attorney General Xavier Becerra. Becerra approved ballot language DeMaio said intentionally misled voters by stating Prop 6 eliminates funding for transportation and road repairs, rather than eliminating taxes. Polling results showed voters would have supported a measure to repeal taxes and fees, he said.

"We are not going away, we must continue to fight to repeal the unfair gas tax," DeMaio said, adding his campaign would get to work recalling Becerra. "There needs to be a price paid by the individuals responsible for this."

THE SACRAMENTO BEE

California's Gas Tax Increase Is Here To Stay

By: Alexei Koseff

11.6.18

California voters on Tuesday rejected a measure to undo recent increases to state fuel taxes and vehicle registration fees, protecting billions of dollars in funding for road maintenance and other transportation projects.

Proposition 6 trailed 55 percent to 45 percent as California election officials reported early returns on Tuesday night. The measure's proponent, Carl DeMaio, accepted defeat around 10 p.m.

Backed by the California Republican Party, which hoped it would boost Republican prospects in a tough election cycle, Proposition 6 faced well-funded opponents.

A coalition of business groups and construction industry unions raised more than \$40 million to defeat the measure and flooded television airwaves in the final month of the election with advertisements, including one starring Brown that warned of dire consequences if it passed. Proponents raised just a tenth of that amount.

Proposition 6 would have required that any new transportation fuel taxes or road usage fees in California be approved by a majority vote of the public. Because it was retroactive to the beginning of 2017, it would have repealed a funding proposal passed last year by the Legislature to pay for road maintenance and public transit projects.

Supported by Brown and mainly Democratic lawmakers, the plan raised the excise tax on gasoline by 12 cents per gallon and the excise tax on diesel by 20 cents per gallon, and tripled the sales tax on diesel.

It also created a new "transportation improvement fee" for vehicle registration, ranging from \$25 to \$175 depending on its value, and a \$100 "road improvement fee" for electric cars. All of those charges rise with inflation in the years ahead.

The new taxes and fees are expected to generate an average of more than \$5 billion annually over the next decade. Most of that is slated for road rehabilitation

and maintenance — half for state highways, half for city and county streets — with an ambitious goal of having at least 98 percent of highway pavement in good or fair condition by 2027. About a quarter of the money is designated for other purposes, such as upgrading bus and light-rail systems and reducing traffic on some of the most heavily-congested travel corridors.

Republicans objected to the funding scheme, arguing that there is already enough money available in the state budget for road repairs without charging consumers more at the pump.

An aggressive campaign for Proposition 6 played on doubts about whether the government had spent existing gas taxes properly. Television commercials made an emotional appeal to voters that the fee increases were simply too much for Californians to bear.

But proponents said they were hamstrung by a ballot title that emphasized how the measure would eliminate billions of dollars in transportation funding. The campaign tried to “correct” that description with a mailer that resembled a message from state election officials. Last week, supporters threatened to recall Attorney General Xavier Becerra over the title.

DeMaio accused Democratic officials of “issuing a false and misleading title” to deceive a majority of residents who support the idea of repealing gas tax increases.

“The politicians thought by stealing an election, we would just go away,” he said. “But there’s a day after the election. Gas is going to continue to get more expensive, and our movement will grow.”

METRO For Transit & Motorcoach Business

When Voting 'Yes' Says 'No' To Funding For Transportation

By: Janna Starcic

November 6, 2018 -

Proposition 6, as it is known, repeals more than \$5 billion of dedicated funding for transportation projects across California, annually, and stops funding for 6,500 transportation improvement projects currently underway. Photo: METRO Magazine

Proposition 6, as it is known, repeals more than \$5 billion of dedicated funding for transportation projects across California, annually, and stops funding for 6,500 transportation improvement projects currently underway. Photo: METRO Magazine

I'm crossing my fingers that by the time you read this, the proposition repealing California's gas tax and vehicle fees (SB 1), which was overwhelmingly passed by the California legislature last year, will have failed. Proposition 6, as it is known, repeals more than \$5 billion of dedicated funding for transportation projects across the state, annually, and stops funding for 6,500 transportation improvement projects currently underway. This includes 453 improvement projects for public transportation operations and services; 337 projects relieving traffic congestion; 554 repairs or replacement of bridges and overpasses; and more than 3,700 projects fixing potholes and repaving crumbling roads, according to the American Society of Civil Engineers (ASCE).

What makes this even worse is the fact that the proposition was only put on the ballot to lure conservative voters to the polls to hopefully shore up support for Republican candidates in this contentious mid-term election. "House Speaker Paul D. Ryan (R-Wis.) and the party's candidate for California governor, John Cox, helped put the initiative on the Nov. 6 ballot in hopes it would help GOP candidates by creating a surge of conservative voters," according to the Los Angeles Times.

Speaking of potholes...

When I was growing up, it seemed like our street was never in disrepair. I remember whenever it was repaved how all the neighborhood kids would break out their skates and bikes to try out the super-smooth asphalt. Now when I drive around my neighborhood, I try to dodge the uneven bumps where potholes and cracks have been filled in over and over again. Nearly 90% of California's counties have roads that are in "poor" or "at-risk" condition, according to the ASCE. And, more than 1,600 bridges and overpasses are structurally deficient and unsafe. While it may sound great to pay less for gas, there won't be any point if you don't have any safe roads or bridges to drive on.

While it may sound great to pay less for gas, there won't be any point if you don't have any safe roads or bridges to drive on.

Eliminating service, delaying projects

Prior to SB 1 approval in 2017, Southern California-based Orange County Transportation Authority (OCTA) projected a \$20 million funding shortfall because of lower bus ridership and weaker growth in

sales tax revenues. But, thanks to SB 1 transit funding, estimated to be about \$19 million, the agency was able to offset the shortfall and prevent bus service reductions.

“If Prop. 6 were to pass, we would likely have to reduce bus service by about 11 percent,” says OCTA spokesman Joel Zlotnick. “We are currently looking at ways to do this that would have the least impact on riders. This potentially includes eliminating bus routes with low productivity and reducing frequency on some routes.”

Additionally, a repeal of SB 1 would leave a funding gap and could cause delays for some existing capital project schedules. In all, Orange County is set to receive more than \$420 million, which includes the money for transit as well as capital project funding, which includes the money for transit as well as capital project funding. One concern is that a loss of SB 1 funding could adversely affect the stabilization of California’s State Transportation Improvement Program, Zlotnick explains, which might mean delays in funding for capital projects.

If Prop. 6 wins on Nov. 6, public transit agencies across the state will be faced with similiarly difficult scenarios. Let’s hope that’s not the case.



Santa Cruz County Regional Transportation Commission
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Luis Pavel Mendez, Deputy Director*

Santa Cruz County Regional Transportation Commission (RTC) November 1, 2018 Meeting Highlights

Executive Director Employment Agreement

The RTC approved the employment agreement for Guy Preston as the incoming Executive Director. Mr. Preston will start on December 3, 2018.

City of Watsonville Report

The RTC received an update from Maria Esther Rodriguez, City of Watsonville Public Works & Utilities Assistant Director, on projects that have been funded by the Commission, Measure D, and the Senate Bill (SB) 1 gas-tax. Ms. Rodriguez and Commissioners noted that funding for essential SB1-funded road repairs in Santa Cruz County would be lost if Proposition 6 passes.

Amendments to the Fiscal Year (FY) 2018-19 Budget and Work Program

The RTC adopted a resolution amending the Fiscal Year (FY) 2018-19 Budget and Work Program. The fall budget incorporates prior year fund balances, new projects, and other updates.

Upcoming RTC and Committee Meetings:

Please check the RTC website [www.sccrtc.org] or call 831-460-3200 to confirm. Agendas are posted to the website at least 3 days before the meeting.

Budget & Administration/Personnel Committee

Thursday, November 8, 2018, 3:00 p.m.
Redwood Room, Santa Cruz County Building,
701 Ocean Street, Santa Cruz, CA

Interagency Technical Advisory Committee

Thursday, November 15, 2018, 1:30 p.m.
RTC Offices, 1523 Pacific Ave, Santa Cruz, CA

Special RTC Meeting

Thursday, November 15, 2018, 6:00 p.m.
City of Watsonville Council Chambers,
275 Main Street, #400, Watsonville, CA

Public input on transportation issues is welcomed and encouraged. For more information, visit the SCCRTC website at www.sccrtc.org or call 460-3200. Some Regional Transportation Commission meetings are televised countywide by Community TV of Santa Cruz. Consult www.communitytv.org or call 831-425-8848 for schedule and station information.

SB1 Projects in Santa Cruz County: At Risk or Will Lose Funds if Prop 6 passes



Formula Funds that would be lost

Transit - Formula Funds for Transit Projects/Services	AT RISK Annual \$	Description
State Transit Assistance (STA) - SB1 supplemental	\$1,920,000	
Local Partnership Program (LPP)	\$310,000	
State of Good Repair (SOGR)	\$670,000	METRO is using these funds to replace buses in order to maintain bus service
	\$2,900,000	

Road Maintenance and Rehabilitation Account (RMRA) - Local Streets and Roads (Annual)

Capitola	\$180,000	
Santa Cruz	\$1,150,000	
Scotts Valley	\$220,000	Projects selected by city councils and Board of Supervisors during public meeting (list of approved projects FY17/18 and FY18/19 available from local jurisdictions)
Watsonville	\$940,000	
County of SC	\$4,690,000	
	\$7,200,000	

Local Partnership Program (LPP) - Measure D match (annual)

	\$310,000	FY17/18-18/19 funds use to repair County roads - Branciforte and Granite Creek
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Total ANNUAL Formula Funds (based on FY18/19 estimates)

	\$10,400,000	
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Projects Approved for SB1 Competitive Grants

Description	SB1 \$ at RISK	Description
Lincoln Street Safety Improvements, near Watsonville High	\$500,000	Active Transportation Program (ATP)
San Lorenzo Riverwalk Lighting, City of Santa Cruz	\$952,000	Active Transportation Program
Scotts Valley: Glenwood Active Transportation	\$1,000,000	LPP-Competitive Program
Felton Nature Discovery Park Trail: Construction and Landscaping	\$87,000	ATP/CCC: County of Santa Cruz Parks Dept project near new Felton Library; Conservation Corp portion of \$600k project
Heart of Soquel Trail Extension and Improvements	\$174,000	ATP/CCC: County of Santa Cruz Parks Dept project; Conservation Corp portion of \$500k project

SHOPP & STIP Projects (programmed FY18/19-22/23 - funds at risk)

Road Maintenance and Rehabilitation Account (RMRA) - State Highway Operation and Protection Program (SHOPP)	\$14,000,000	Avg. annual new funds available for safety and maintenance projects on local highways
Santa Cruz 1 Davenport Culvert Replacement Drainage Project	\$8,300,000	Replace and upgrade culverts on Hwy 1 near Davenport
Santa Cruz 17 CAPM Pavement Project	\$19,000,000	Repave 26 miles of State Route 17 (Santa's Village Road to Sta Clara County line)

Santa Cruz 9 San Lorenzo River & Kings Creek Bridges Project	\$23,200,000	Replace the Hwy 9/San Lorenzo River Bridge and the Kings Creek Bridge north of Boulder Creek
Traffic Management System Detection Repair Mobility Project	\$5,500,000	Traffic management system - replace traffic monitoring field elements on Highway 1 and Highway 17
State Transportation Improvement Program (STIP) - projects not yet allocated - funds will no longer be available for most of these projects if Prop 6 passes		
MBSST- Segment 18, Watsonville	\$950,000	Rail Trail in Watsonville
Water Street Pavement Rehabilitation	\$398,000	City of Santa Cruz
State Routes 1/9 Intersection Improvements	\$2,853,000	Turn Lanes, operational improvements, bicycle lanes
Hwy 1 41st Ave-Soquel Ave Auxiliary Lanes and Chanticleer Bike/Ped Bridge	\$6,000,000	New auxiliary lanes and new bike/ped access over highway
Cruz511 Traveler Information and Rideshare Program	\$150,000	Program provides carpool, transit, telecommute and traveler information
RT 1 Mar Vista Bike/Ped Overcrossing	\$6,779,000	Bike/ped overcrossing
River Street Pavement Rehabilitation	\$775,000	City of Santa Cruz
Highway 17 to Soquel Corridor Roadway Preservation	\$800,000	County of Santa Cruz
Zayante Road Corridor Roadway Preservation	\$950,000	County of Santa Cruz
Scotts Valley Area Routes Roadway Preservation	\$832,000	County of Santa Cruz
Freedom Blvd Reconstruction (Alta Vista Ave to Davis Rd)	\$1,550,000	City of Watsonville
SR1-State Park to Bay/Porter Auxiliary Lanes	\$1,830,000	New auxiliary lanes (environmental review)
Total STIP Projects at Risk (FY18/19-22/23)		
	\$24,000,000	

SB 1 Planning Grants

AMBAG Sustainable Communities Planning	\$315,000	Sustainable Communities Formula Grant to AMBAG for multimodal transportation and land use planning associated with development and implementation of the tri-county Sustainable Communities Strategy (SCS)
City of Watsonville Complete Streets to Schools Plan	\$321,000	SB 1 Sustainable Communities Grant. Identify barriers and prioritize projects to increase multimodal transportation at 15 City schools to help increase student biking, walking and transit use, and make it safer.
Santa Cruz County Complete Streets to Schools Plan	\$367,000	SB 1 Sustainable Communities Grant. Plan for multimodal transportation in Scotts Valley and urban areas in unincorporated County of Santa Cruz near 19 schools.
City of Santa Cruz - West Cliff Drive Adaptation and Management Plan	\$343,000	SB 1 Adaptation Planning Grant. Assess options to protect West Cliff Dr from strong waves, including assessment of the roadway and path, the efficacy of riprap, and stones buttressing the cliffs.

5-year Total At Risk (low estimate) *	\$126,000,000
Annual avg	\$25,000,000

*Unescalated amount. If additional competitive grants received, 5-year unescalated total would be up closer to \$135-165 million

Some of the Other Major Projects - Anticipated to receive SB1 Funds over the next 5-10 Years

Highway 1 Auxiliary Lanes	TBD (\$5-35M)	Measure D will be used to leverage state funds
Monterey Bay Sanctuary Scenic Trail Network (MBSST)	TBD (\$25-75M)	Live Oak-Seabright is candidate for Cycle 4 ATP; Measure D will be used to leverage state funds for this and other sections of trail
Transit Service Expansion	TBD	Countywide
Highway 9/San Lorenzo Valley (SLV) Corridor Improvements: Various bike, pedestrian, transit, intersection, and safety projects.	TBD	Includes priorities identified by the community through the Highway 9/SLV Corridor Plan
Highway 1/Harkins Slough Road Bicycle/Pedestrian Bridge	\$14 million	Harkins Slough Road from the intersection with Green Valley Road and Silver Leaf Drive to Pajaro Valley High School
MBSST Segment 8 & 9, Live Oak-Seabright	\$23 million	Rail Trail multiuse path between the Pacific Avenue in the City of Santa Cruz and 17th Avenue in Santa Cruz County.
Green Valley Road Pedestrian Improvements	\$2.6 million	Construct 2362 lf of sidewalk along the west side of Green Valley Road from Holohan Rd to Amesti Rd and from Cowles Road to Pinto Lake Road.
Safe Routes to Schools Projects	\$2-3 million	School and community-based programs to improve safety and increase walking and biking.
Highway 17 Express Fare Solution and Capacity Increase	\$6.6 million	Improved transit services through an integrated mobile ticketing fare collection system, improved boardings and improved commuter style coaches to expand service and provide connectivity between Santa Cruz and the San Jose Diridon Train station with Amtrak Thruway bus, Capital Corridor and Caltrain
SR 17 Access Management Improvements	TBD	Implementation of the SR17 Access Management Plan - may include new interchanges over Hwy 17 between Vine Hill Road and Old Santa Cruz Hwy
SR 1 Operational Improvements for Transit (Bus on Shoulders)	\$8 million	Upgrade shoulder to allow for use by METRO buses between interchanges.
SR 1 San Lorenzo River Bridge Widening	\$20 million	Replace the Highway 1 bridge over San Lorenzo River improve vehicle flow, safety, seismic stability, and fish passage.
Hwy 17/ Vine Hill School Rd Bike/ped Overcrossing, Scotts Valley	TBD	Part of the Hwy 17 Access Management Plan
Watsonville Downtown Revitalization and Major Arterial Upgrades	\$8 million	Implementation of projects to improve walking, biking, and circulation downtown and on Airport Blvd, Freedom Blvd, Green Valley Road, etc.