



**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (METRO)
BOARD OF DIRECTORS AGENDA
REGULAR MEETING
AUGUST 23, 2019 – 9:00 AM
METRO ADMIN OFFICES
110 VERNON STREET, SANTA CRUZ, CA**

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

BOARD ROSTER

Director Ed Bottorff	City of Capitola
Director Trina Coffman-Gomez	City of Watsonville
Director Aurelio Gonzalez	City of Watsonville
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 Donna Meyers	City of Santa Cruz
Director Larry Pageler	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 Stephen Preston	UC Santa Cruz
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. Mindy Esqueda to introduce her 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.

5.1 August 8, 2019 Letter from the Santa Cruz County Commission on Disabilities

5.3 August 12, 2019 email from Rick Longinotti, Campaign for Sustainable Transportation

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

Alex Clifford, CEO/General Manager

9-02 ACCEPT AND FILE PRELIMINARY APPROVED CHECK JOURNAL DETAIL FOR THE MONTHS OF JUNE AND JULY 2019

Angela Aitken, CFO

9-03 ACCEPT AND FILE THE MINUTES OF THE JUNE 28, 2019 REGULAR METRO BOARD OF DIRECTORS MEETING AND THE AUGUST 9, 2019 SPECIAL METRO BOARD OF DIRECTORS MEETING

Alex Clifford, CEO/General Manager

9-04 ACCEPT AND FILE THE METRO PARACRUZ OPERATIONS STATUS REPORT FOR APRIL, MAY AND JUNE 2019

Daniel L. Zaragoza, Operations Manager, Paratransit Division

9-05 ACCEPT AND FILE METRO SYSTEM RIDERSHIP REPORTS FOR THE FOURTH QUARTER OF FY19

Barrow Emerson, Planning and Development Director

9-06 ACCEPT AND FILE QUARTERLY STATUS REPORT OF GRANT APPLICATIONS AND ACTIVE GRANTS FOR THE FOURTH QUARTER OF FY19

Wondimu Mengistu, Grants/Legislative Analyst

9-07 ACCEPT AND FILE THE YEAR TO DATE MONTHLY FINANCIAL REPORT AS OF MAY 31, 2019

Angela Aitken, CFO

9-08 APPROVE: CONSIDER A RESOLUTION DESIGNATING THE CEO AS THE AUTHORIZED AGENT TO SUBMIT A PROJECT LIST AND EXECUTE AGREEMENTS TO RECEIVE CALIFORNIA STATE OF GOOD REPAIR FUNDS

Wondimu Mengistu, Grants/Legislative Analyst

9-09 APPROVE: CONSIDER A RESOLUTION AUTHORIZING THE CEO TO SUBMIT APPLICATIONS AND EXECUTE AGREEMENTS FOR GRANTS FROM THE FEDERAL TRANSIT ADMINISTRATION AND FROM THE CALIFORNIA DEPARTMENT OF TRANSPORTATION

Wondimu Mengistu, Grants/Legislative Analyst

9-10 APPROVE: CONSIDERATION OF DECLARING VEHICLES AND/OR EQUIPMENT AS EXCESS FOR PURPOSES OF DISPOSAL OR AUCTION

Angela Aitken, CFO

- 9-11 CONSIDERATION OF APPROVAL OF AUDIT ENGAGEMENT LETTER WITH BROWN ARMSTRONG ACCOUNTANCY CORPORATION FOR FINANCIAL AUDIT AND TAX SERVICES FOR THE FISCAL YEAR ENDED JUNE 30, 2019**
Angela Aitken, CFO
- 9-12 APPROVE: RENEWAL OF PROPERTY INSURANCE COVERAGE FOR FY20 WITH ZURICH AMERICAN INSURANCE COMPANY**
Angela Aitken, CFO
- 9-13 APPROVE: CONSIDERATION OF RATIFICATION OF CONTRACT WITH ALLIANT INSURANCE SERVICES, INC. FOR EMPLOYEE VISION CARE INSURANCE NOT TO EXCEED \$701,500**
Dawn Crummié, HR Director
- 9-14 CONSIDERATION OF AWARD OF CONTRACT TO CENTRAL ELECTRIC COMPANY FOR PURCHASE AND INSTALLATION OF AN EMERGENCY POWER GENERATOR NOT TO EXCEED \$307,732**
Freddy Rocha, Facilities Manager
- 9-15 APPROVAL OF THE FINAL SEIU POSITION DESCRIPTIONS**
Dawn Crummié, HR Director
- 9-16 CONSIDERATION OF AUTHORIZATION TO USE THE STATE OF CALIFORNIA DEPARTMENT OF GENERAL SERVICES CONTRACT FOR THE PURCHASE OF SIX STERTIL-KONI WIRELESS MOBILE COLUMN LIFTS AND ONE FACILITIES SUPPORT VEHICLE**
Eddie Benson, Maintenance Manager
- 9-17 CONSIDERATION OF AWARD OF CONTRACT FOR ONE CNG BUS TO GILLIG, LLC IN AN AMOUNT NOT TO EXCEED \$664,797**
Eddie Benson, Maintenance Manager
- 9-18 CONSIDERATION OF RATIFICATION OF USE OF STATE OF CALIFORNIA DEPARTMENT OF GENERAL SERVICES CONTRACT FOR THE PURCHASE OF ONE LOW ROOF CARGO VAN**
Eddie Benson, Maintenance Manager

REGULAR AGENDA

- 10 PRESENTATION OF EMPLOYEE LONGEVITY AWARDS:**
10 YEARS: LISA MITCHELL, CLARENCE ARAGON, JULIO GARCIA VELASCO
20 YEARS: SALVADOR CALDERON, EDUARDO MONTESINO, RICHARD OROZCO, JOSE HERRERA, CHRIS KANE
30 YEARS: SERGIO LONA-GONZALEZ AND A.J. DAUGHERTY
Ed Bottorff, Board Chair
- 11 CEO ORAL REPORT**
Alex Clifford, CEO/General Manager

- 12 **CONSIDERATION OF THE APPOINTMENT OF JAMES VON HENDY TO THE METRO ADVISORY COMMITTEE (MAC) FOR A TERM OF OFFICE ENDING DECEMBER 31, 2021 AND EXTEND THE NOMINATION PERIOD TO SOLICIT AND ACCEPT BOARD NOMINEES AND CITIZEN APPLICATIONS FOR TWO SEATS EXPIRING DECEMBER 31, 2019**
Alex Clifford, CEO/General Manager
- 13 **CONSIDERATION OF RATIFICATION OF CONTRACT WITH CENTRAL ELECTRIC COMPANY FOR CONSTRUCTION TO INSTALL ELECTRIC VEHICLE CHARGING INFRASTRUCTURE NOT TO EXCEED \$646,496**
Erron Alvey, Purchasing & Special Projects Director
- 14 **AUTHORIZE A PUBLIC HEARING ON A FIXED ROUTE FREE FARE PROGRAM FOR LEGALLY BLIND CUSTOMERS**
Jayme Ackemann, Marketing, Communications and Customer Service Director
- 15 **RECEIVE AN UPDATE ON THE SCCRTC RAIL CORRIDOR ALTERNATIVE ANALYSIS STUDY SCOPE OF WORK**
Barrow Emerson, Planning and Development Director
- 16 **ORAL PACIFIC STATION UPDATE**
Barrow Emerson, Planning and Development Director
- 17 **APPROVE: RESOLUTION OF THE BOARD OF DIRECTORS OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT DECLARING THE COMPENSATION AND BENEFITS OF METRO EMPLOYEES UNCERTAIN AS OF JULY 1, 2019**
Julie Sherman, General Counsel
- 18 **REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION**
Julie Sherman, General Counsel
- 19 **ANNOUNCEMENT OF NEXT MEETING: FRIDAY, SEPTEMBER 27, 2019 AT 9:00 AM, AT THE SANTA CRUZ CITY COUNCIL CHAMBERS, 809 CENTER STREET, SANTA CRUZ, CA**
Ed Bottorff, Board Chair
- 20 **RECESS TO CLOSED SESSION**

SECTION II: CLOSED SESSION

- 21 **CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION (Government Code Section 54956.9 (d)(1))**
Case: WCAB No. ADJ10647200 and ADJ10646540
Claimant: Tarquino Chacon Chavarria
Agency: Santa Cruz Metropolitan Transit District
Marie Sang, Attorney
- 22 **CONFERENCE WITH LEGAL COUNSEL – ANTICIPATED LITIGATION**
Significant exposure to litigation pursuant to Government Code Section 54956.9 (d)(2) – One potential case

SECTION III: RECONVENE TO OPEN SESSION

23 REPORT OF CLOSED SESSION ITEMS

Julie Sherman, General Counsel

24 ADJOURNMENT

Ed Bottorff, 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.

Communications to the Board of Directors



Santa Cruz County Commission on Disabilities

701 Ocean Street, Room 510, Santa Cruz, CA 95060
P: (831) 454-2772 F: (831) 454-2411 TTY/TDD 711
commissions@santacruzcounty.us
www.sccod.net

August 8, 2019

Board of Supervisors
County of Santa Cruz
701 Ocean Street, Room 500
Santa Cruz, CA 95060



RE: Recent Decision Regarding Santa Cruz Metro Transit District (SCMTD) Board of Directors Membership Criteria

Dear Chair Coonerty and Members of the Board,

The purpose of this letter is to express our concern regarding your recent decision to revise SCMTD Board membership criteria, and the potential impact this decision may have on Santa Cruz County residents with disabilities who use the Metro system as their primary means of transportation.

Since 1995, County policy has required that the SCMTD Board of Directors have at least one Board member who lives with a disability and uses public transportation as their primary means of transportation. This requirement ensured that at least one decision-making voice on the Board would be someone who experiences the impact of those decisions daily.

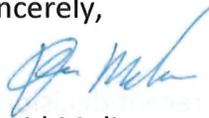
On February 26, 2019, your Board expanded the criteria for this seat to include the following option: *"...and/or a person who has extensive experience and knowledge in planning, building and operating accessible transportation infrastructure and services for disabled riders."* The implication is that someone who designs and plans services for people with disabilities has the same or equally valuable knowledge and perspective as a person living with a disability. We respectfully disagree. While we see the value of giving a person with this type of planning and design experience a voice on the Board, we do not believe that they can replace the perspective and experience of someone living with a disability and primarily using public transportation.

Given the number of vacancies in our own Commission, we understand the difficulty in filling vacancies with criteria related to disability. In order to ensure that there remains at least one person on the Board with a disability and who primarily uses public transportation, we would like to offer our assistance in filling the next vacated seat on the SCMTD Board of Directors. Even if the seat vacated does not require it, we believe it would be beneficial to prioritize that criteria when considering candidates for the appointment, and we will lend our efforts to reach out to our community to find suitable applicants.

Communications to the Board of Directors

We would also like to offer our perspective and insight on any future matters that come before your Board with potential implications for persons with disabilities. Your Board has always been tremendously supportive of our efforts to expand awareness and enhance opportunity for our community. Going forward, we hope to reciprocate that support by becoming a more active resource in your consideration of matters concerning people with disabilities. We welcome the opportunity to comment on such matters so that our perspective can be included in your consideration. It is our hope that we can establish more vital, open communication between our Commission and your Board, so that we may both better serve the interests of people with disabilities in Santa Cruz County.

Sincerely,



David Molina

Commission Vice Chair

On behalf of the Santa Cruz County Commission on Disabilities

cc: Santa Cruz Metro Transit District Board of Directors

Communications to the Board of Directors

From: Rick Longinotti <longinotti@baymoon.com>

Sent: Monday, August 12, 2019 3:50 PM

To: Ed Bottorff <ebottorff167@yahoo.com>; Michael Rotkin <openup@ucsc.edu>;

dlindslind@earthlink.net; Donna Meyers <dmeyers@cityofsantacruz.com>;

cmathews@cityofsantacruz.com; trina.coffman@cityofwatsonville.org;

aurelio.gonzalez@cityofwatsonville.org; bruce.mcpherson@santacruzcounty.us; darothwe@cabrillo.edu

Cc: Alex Clifford <AClifford@scmtd.com>

Subject: contract settlement

Dear METRO Board Members,

Our organization has heard from METRO riders about the inconvenience of cancelled routes. This concerns us, as our organization has put considerable effort into advocating that public transit become a higher priority in this community. We're concerned that METRO's reputation may be tarnished due to the service disruption. This is the last thing that METRO needs.

We aren't fully informed about the issues standing in the way of a labor agreement with the bus drivers. However, we do appreciate the drivers for deferring increased compensation during the recent past when METRO was facing a serious structural deficit. Now with a better financial picture, we hope METRO would put a high priority on compensating drivers. We realize that the METRO is still unable to purchase needed vehicles, expand frequency and duration of routes, which are also important. We feel that it's our job as community members to advocate for better funding for METRO so that it can get to the next level of community support.

We suggest that high morale among drivers is a key piece of the quest for improved transit service. The fact that drivers rejected a tentative contract does not indicate high morale. We suggest that METRO settle this contract dispute on terms that are acceptable to the drivers.

Thank you,



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DATE: August 23, 2019
TO: Board of Directors
FROM: Alex Clifford, CEO/General Manager
SUBJECT: RECOMMENDED ACTION ON TORT CLAIMS

I. RECOMMENDED ACTION

That the Board of Directors Approve Staff Recommendations for Claims for the Month of August 2019

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 one claim for the month of August 2019 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
Jager, Stephanie	19-0008	Claimant alleges that an improperly secured wheel chair fell onto her leg causing an injury. Amount of claim: \$4,980.00.	Reject

Prepared by: Tom Szeszowicki, Safety Specialist

VII. APPROVAL:

Rufus Francis
Safety, Security and Risk Director



Alex Clifford, CEO/General Manager



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DATE: August 23, 2019
TO: Board of Directors
FROM: Angela Aitken, Chief Financial Officer
**SUBJECT: ACCEPT AND FILE PRELIMINARY APPROVED CHECK JOURNAL
DETAIL FOR THE MONTHS OF JUNE AND JULY 2019**

I. RECOMMENDED ACTION

That the Board of Directors accept and file the preliminary approved Check Journal Detail for the months of June and July 2019

II. SUMMARY

- This staff report provides the Board with a preliminary approved Check Journal Detail for the months of June and July 2019.
- 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 months of June and July 2019 that have been processed, checks issued and signed by the Chief Financial Officer.

IV. FINANCIAL CONSIDERATIONS/IMPACT

None. The check journals are a presentation of invoices paid in June and July 2019 for purposes of Board review, agency disclosure, accountability and transparency.

V. ALTERNATIVES CONSIDERED

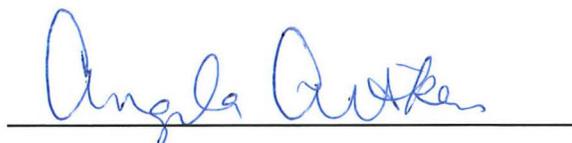
N/A

VI. ATTACHMENTS

Attachment A: Check Journal Detail for the Months of June and July 2019
Prepared by: Holly Alcorn, Accounting Specialist

VII. APPROVALS:

Angela Aitken, Chief Financial Officer



Alex Clifford, CEO/General Manager



Attachment A

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

DATE: 06/01/19 THRU 06/30/19

CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
65508	06/03/19	1,749.60	ACCOUNTEMPS A ROBERT HALF CO		93865	W/E 05/17/19 TEMP	1,749.60	
65509	06/03/19	4,519.53	AIRTEC SERVICE INC.		93874	MAINT 1200 RIVER OPS	3,073.00	
					93875	MAINT RESEARCH PARAC	262.00	
					93876	MAINT KINGS TRANSIT	257.00	
65510	06/03/19	244.50	AMERICAN PUBLIC TRANSPORTATION		93877	MAINT VERNON ADMIN	927.53	
65511	06/03/19	445.40	AT&T		93879	PASSENGER TRANSP AD	244.50	
					93926	4/19-5/18 DAVENPORT	164.69	
					93927	4/19-5/18 OCEAN	280.71	
65512	06/03/19	1,922.59	BRENCO OPERATING-TEXAS, LP		93891	INVENTORY ORDER	1,922.59	
65513	06/03/19	5,625.00	CABRILLO COLLEGE		93932	#7152-402 TRAINING	5,625.00	
65514	06/03/19	3,236.00	CAPITOL CLUTCH & BRAKE, INC.		93898	INV, BRAKES, DRUMS	3,236.00	
65515	06/03/19	1,075.65	CASTILLO, JUAN		93863	TRAVEL EXPENSES	1,075.65	
65516	06/03/19	80.00	CITY OF WATSONVILLE CITY CLERK		93864	A/V TECH SERVICE	80.00	
65517	06/03/19	684.00	CLAREMONT EAP		93880	JUNE19 EAP COVERAGE	684.00	
65518	06/03/19	9,696.60	CLASSIC GRAPHICS		93869	RPR BUS 9826 FLOOR	3,218.91	
					93929	REPAINT BUS 2806	6,477.69	
65519	06/03/19	385.00	COMMUNITY TELEVISION OF		93934	4/26/19 MEETING	385.00	
65520	06/03/19	7,833.38	CUMMINS PACIFIC LLP		93870	INVENTORY ORDER	4,727.71	
					93871	PARTS MANUAL ARTICS	130.71	
					93872	INVENTORY ORDER	1,270.80	
					93899	WATER PUMP CAMPAIGN	809.66	
					93900	WATER PUMP CAMPAIGN	894.50	
65521	06/03/19	788.50	DOCTORS ON DUTY MEDICAL CLINIC		93878	STATEMENT 05/08/19	788.50	
65522	06/03/19	2,090.65	EAST BAY TIRE CO.		93894	REVENUE TIRES	42.05	
					93895	TIRES	188.62	
					93896	REVENUE TIRES	1,616.27	
65523	06/03/19	13,193.88	EXPRESS SERVICES INC.		93897	REVENUE TIRES	243.71	
					93905	W/E 05/12/19 TEMP	3,000.00	
					93906	W/E 05/19/19 TEMP	3,000.00	
					93909	W/E 05/05/19 TEMP	961.92	
					93910	W/E 04/28/19 TEMP	901.80	
					93911	W/E 05/19/19 TEMP	1,135.60	
					93912	W/E 05/12/19 TEMP	908.48	
					93913	W/E 05/05/19 TEMP	1,135.60	
					93914	W/E 04/28/19 TEMP	908.48	
					93917	W/E 05/19/19 TEMP	1,242.00	
65524	06/03/19	57.26	FRONTIER COMMUNICATIONS - 3025		93928	209-091-6033-1126145	57.26	
65525	06/03/19	557.57	GRAINGER		93902	INV FLUORESCENT LAMP	465.58	
					93933	COUPLING, RESPIRATOR	91.99	
65526	06/03/19	4,535.36	JASPER WELLES LLC		93904	INVENTORY ORDER	4,535.36	
65527	06/03/19	31.21	KELLEY'S SERVICE INC.		93873	PRP VEH# PC1107	31.21	
65528	06/03/19	157.62	MAILFINANCE INC		93915	5/28-6/27 LEASE	157.62	
65529	06/03/19	22,563.27	MANSFIELD OIL CO OF GAINSVILLE		93866	05/10/19 DIESEL FUEL	22,563.27	
65530	06/03/19	106.50	MISSION UNIFORM		93882	LAUNDRY SERVICE	34.50	
					93924	LAUNDRY SERVICE	36.00	
					93925	LAUNDRY SERVICE	36.00	

Attachment A

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

DATE: 06/01/19 THRU 06/30/19

CHECK NUMBER	CHECK DATE	CHECK VENDOR	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
65531	06/03/19	003326	67.73	NIDAL HALABI & NADA ALGHARIB		93907	NAME PLATES	21.85	
65532	06/03/19	023	656.75	PACIFIC TRUCK PARTS, INC.		93922	NAME PLATES/HOLDER	45.88	
65533	06/03/19	043	387.03	PALACE ART & OFFICE SUPPLY		93892	INVENTORY ORDER	656.75	
65534	06/03/19	107A	121.76	PROBULLD COMPANY LLC		93881	OFFICE SUPPLIES	87.45	
65535	06/03/19	003024	188.09	RICOH USA, INC CA		93923	OFFICE SUPPLIES	29.22	
65536	06/03/19	003154	1,950.12	ROMAINE ELECTRIC CORP		93883	WO# 162740 @ SMC	10.88	
65537	06/03/19	079	2,338.15	SANTA CRUZ MUNICIPAL UTILITIES		93884	WO# 162696 BUS STOP	15.22	
65538	06/03/19	003441	2,856.25	STRATEGIC ECONOMICS, INC.		93885	WO# 162273 BS1084	87.23	
65539	06/03/19	003285	995.27	THE AFTERMARKET PARTS CO LLC		93886	WO# 162273 BS1084	8.43	
65540	06/03/19	057	24,213.79	U.S. BANK		93916	2/1-4/30 IMAGES	188.09	
65541	06/03/19	007	70.46	UNITED PARCEL SERVICE		93889	INVENTORY ORDER	1,300.08	
65542	06/03/19	001165	317.16	VU, THANH DR. MD	7	9390	INVENTORY ORDER	650.04	
65543	06/03/19	002291	444.61	WINCHESTER AUTO		93930	3/13-4/12 RESEARCH	1,725.41	
65544	06/03/19	147	455.12	ZEE MEDICAL SERVICE CO.		93931	FINAL 4/13-5/12 PC	612.74	
65545	06/04/19	E1034	1,300.00	CAMPOS, ARACELI		93862	PACIFIC DEVELOPMENT	2,856.25	
65546	06/04/19	E1033	900.00	JEFFRIES, JOAN		93867	INVENTORY ORDER	492.74	
65547	06/10/19	003151	519.25	ABC BUS INC		93868	INVENTORY ORDER	53.23	
65548	06/10/19	003283	2,082.71	ACCOUNTEMPS A ROBERT HALF CO		93887	INVENTORY ORDER	409.56	
65549	06/10/19	002861	32.47	AMERICAN MESSAGING SVCS, LLC		93888	RPR VEH# 1001	39.74	
65550	06/10/19	497A	39,250.00	AMERICAN PUBLIC TRANSPORTATION		93861	****-****-****-5056	24,213.79	
65551	06/10/19	001D	4,034.50	AT&T		93918	FREIGHT	70.46	
65552	06/10/19	003105	997.62	AT&T MOBILITY		93919	DMV RENEWAL	75.00	
65553	06/10/19	003199	206.01	B & H FOTO & ELECTRONICS CORP		93920	DMV RENEWAL	92.16	
65554	06/10/19	E1032	1,003.88	BALLESTROS, IVAN		93921	DMV RENEWAL	75.00	
65555	06/10/19	E996	348.80	BENSON, EDDIE		93901	INVENTORY ORDER	444.61	
65556	06/10/19	002035	5,487.50	BOWMAN & WILLIAMS INC		93908	FIRST AID SUPPLIES	455.12	
65557	06/10/19	588	14,135.45	CALTIP		93960	TRAVEL ADVANCE	900.00	
65558	06/10/19	001159	2,611.89	CATTO'S GRAPHICS, INC.		94016	INVENTORY ORDER	151.62	
						94017	WATER PUMP CAMPAIGN	367.63	
						93990	W/E 05/24/19 TEMP	1,683.99	
						93991	W/E 05/24/19 TEMP	398.72	
						94073	ON CALL PAGERS	32.47	
						94037	7/1-6/30/20 APTA DUE	39,250.00	
						93937	4/19-5/18 SCMTD MAIN	3,889.32	
						93983	4/19-5/18 OPS ELEV	145.18	
						93962	4/24-5/23 WIRELESS	997.62	
						93953	HEADSET CALL CENTER	206.01	
						93995	TRAVEL EXPENSES	1,003.88	
						94029	TRAVEL EXPENSE	348.80	
						93946	4/1-4/30 SERVICES	4,875.00	
						93994	APR19 FIRE EGRESS	612.50	
						94080	MAY19 CODE=5100	14,135.45	
						93964	SUMMER BS STICKERS	2,611.89	

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65559	06/10/19	170.43 667		CITY OF SCOTT'S VALLEY		93968	3/16-5/15 246 KINGS	170.43	
65560	06/10/19	33,003.39 001124		CLEAN ENERGY		93988	MAY19 INSPECTION	14,842.00	
						94042	05/06/19 LNG CHARGES	6,831.33	
						94043	05/08/19 LNG CHARGES	6,105.26	
						94044	05/10/19 LNG CHARGES	5,224.80	
65561	06/10/19	626.22 075		COAST PAPER & SUPPLY INC.		93945	OFFICE SUPPLIES	626.22	
65562	06/10/19	3,650.00 003353		COMMUNITY TRANSPORTATION ASSOC		94036	FY20 MEMBERSHIP	3,650.00	
65563	06/10/19	4,339.18 508		COMPLETE COACH WORKS INC		94051	BUS 2210 WO# 160763	4,339.18	
65564	06/10/19	19,270.69 003116		CUMMINS PACIFIC LLP		94011	BUS 2809 P1STON UPGR	15,364.21	
						94012	RPR VEH# 2809	710.58	
						94013	COMPRESSOR CAMPAIGN	1,876.17	
						94070	VEH 2810 COMPRS CAMP	1,319.73	
65565	06/10/19	600.00 E1009		CUMMINS, EDWARD		94030	TRAVEL ADVANCE	600.00	
65566	06/10/19	33,254.84 954		DOWNTOWN FORD SALES		94078	CARGO VAN VEH# 1951	33,254.84	VOIDED
65566	06/10/19	-33,254.84 954		DOWNTOWN FORD SALES		94078	CARGO VAN VEH# 1951	-33,254.84	**VOID
65567	06/10/19	4,325.04 003274		EAST BAY TIRE CO.		94058	REVENUE TIRES	1,080.88	
						94059	REVENUE TIRES	1,048.10	
						94060	REVENUE TIRES	188.62	
						94061	VEH 603 NON REV TIRE	254.17	
						94062	REV TIRES	1,048.10	
65568	06/10/19	8,031.88 432		EXPRESS SERVICES INC.		94063	REVENUE DISMOUNT	166.41	
						94064	REVENUE TIRES	538.76	
						93938	W/E 5/26/19 TEMP	901.80	
						93939	W/E 05/26/19 TEMP	908.48	
						93940	W/E 05/19/19 TEMP	901.80	
						93941	W/E 05/12/19 TEMP	176.00	
						93950	W/E 05/26/19 TEMP	3,000.00	
						93951	W/E 05/26/19 TEMP	1,242.00	
						94002	W/E 05/26/19 TEMP	548.00	
65569	06/10/19	548.00 039		FEDEX OFFICE		93963	TRANSIT POSTERS MISC	548.00	
65570	06/10/19	11,657.14 002952		FLYERS ENERGY LLC		94050	5/1-5/15 PC FUEL	11,657.14	
65571	06/10/19	298.00 001302		GARDA CL WEST, INC.		93965	JUNE 19 SERVICES	298.00	
65572	06/10/19	30.00 001189		GARY KENVILLE LOCKSMITH	7	93943	KEYS 8 LOCATIONS	30.00	
65573	06/10/19	343.95 647		GENFARE A DIV OF SPX CORP		94041	INVENTORY ORDER	343.95	
65574	06/10/19	1,754.85 117		GILLIG LLC		94020	INVENTORY ORDER	1,053.45	
						94021	INVENTORY ORDER	701.40	
65575	06/10/19	1,316.78 282		GRAINGER		93977	EXTENTION CORDS	28.24	
						93978	CLAW HAMMER, WRENCH	164.18	
						93982	NAIL PULLERS	101.47	
						93984	LOCKING PLIER SETS	242.27	
						94015	OIL RAG CANS SHOP	596.17	
						94055	INVENTORY ORDER	184.45	
65576	06/10/19	14,737.24 001745		HARTFORD LIFE AND ACCIDENT INS		94033	JUNE19 LIFE AD&D	4,226.69	
						94034	JUNE19 LTD INS	10,510.55	
65577	06/10/19	2,443.20 166		HOSE SHOP, THE INC		94046	NON INV HYDRAULIC	231.80	
						94047	AIR HOSES	408.91	

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65578	06/10/19	1,621.97	003327	IO, RODNEY H		94048	VEH# 2236 HOSE ASSY	576.57	
65579	06/10/19	195.36	003223	JASPER WELLS LLC		94049	INVENTORY ORDER	1,225.92	
65580	06/10/19	34.28	E921	KEGLEY, RICKIE-ANN		94069	RPR VEH# 1401	1,621.97	
65581	06/10/19	1,297.49	1117	KELLEY'S SERVICE INC.		94071	INVENTORY ORDER	4,535.36	
65582	06/10/19	23,627.38	003366	KEY GOVERNMENT FINANCE INC		94081	CORE CREDIT	-4,340.00	
65583	06/10/19	274.83	001233	KIMBALL MIDWEST		94028	TRAVEL EXPENSE	34.28	
65584	06/10/19	1,996.48	852	LAW OFFICES OF MARIE F. SANG	7	94022	INV GLOVES	636.36	
65585	06/10/19	700.00	E182	LOGIUDICE, JASON		94023	INV GLOVES	424.24	
65586	06/10/19	62.00	T307	MARQUEZ, MATTHEW		94053	INVENTORY ORDER	236.89	
65587	06/10/19	190.00	003249	MAXIMUM OIL SERVICE LLC		94077	JUN19 PAYMENT	23,627.38	
65588	06/10/19	2,600.00	E1026	MAYWEATHER, ANSON		94052	NON INV SUPPLIES	274.83	
65589	06/10/19	601.31	041	MISSION UNIFORM		94038	1/30-5/23 WC LEGAL	823.48	
65590	06/10/19	200.00	003061	NEOFUNDS BY NEOPOST DBA		94039	3/18-5/23 WC LEGAL	1,173.00	
65591	06/10/19	689.52	023	PACIFIC TRUCK PARTS, INC.		94031	TRAVEL EXPENSE	700.00	
65592	06/10/19	3,593.12	043	PALACE ART & OFFICE SUPPLY		93936	5/20-5/29 PARKING	62.00	
65593	06/10/19	135.50	481	PIED PIPER EXTERMINATORS, INC.		93942	5/28/19 WASTE OIL PU	190.00	
65594	06/10/19	223.32	050	PITNEY BOWES INC. RENTAL PMT		94079	TUITION REIMBURSEMENT	2,600.00	
65595	06/10/19	35,454.40	002939	PREFERRED BENEFIT		93986	LAUNDRY SERVICE	34.50	
65596	06/10/19	116.52	107A	PROBUILD COMPANY LLC		94065	LAUNDRY SERVICE	50.00	
65597	06/10/19	357.70	003020	QUEST DIAGNOSTIC INC.		94066	LAUNDRY SERVICE	194.89	
						94067	LAUNDRY SERVICE	50.00	
						94068	UNIFORM SERVICE	192.89	
						94074	UNIFORM/LAUNDRY SERV	79.03	
						94076	POSTAGE	200.00	
						94019	INVENTORY ORDER	717.12	
						94082	CORE CREDIT	-13.80	
						94083	CORE CREDIT	-13.80	
						93942	OFFICE SUPPLIES	166.77	
						93956	OFFICE SUPPLIES	295.99	
						93957	OFFICE SUPPLIES	424.73	
						93958	OFFICE SUPPLIES	154.40	
						93959	OFFICE SUPPLIES	2,003.40	
						93989	OFFICE SUPPLIES	63.80	
						94024	OFFICE SUPPLIES	167.45	
						94025	OFFICE SUPPLIES	17.63	
						94026	OFFICE SUPPLIES	36.82	
						94072	OFFICE SUPPLIES	64.11	
						94075	OFFICE SUPPLIES	198.02	
						93979	MAY19 920 PACIFIC	40.00	
						93980	MAY19 920 PACIFIC	55.50	
						93981	MAY19 920 PACIFIC	40.00	
						93955	POSTAGE METER RENTAL	223.32	
						94032	JUNE19 DENTAL INS	35,454.40	
						93985	WO# 162743 MMF	76.46	
						93987	WO# 162743 MMF	40.06	
						94035	APR19 LAB SERVICES	357.70	

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65598	06/10/19	267.66 215	RICOH USA, INC. TX	93954	6/3-7/2 LEASE	267.66			
65599	06/10/19	355.06 003154	ROMAINE ELECTRIC CORP	94054	CAMPAIGN VEH# 2810	355.06			
65600	06/10/19	49.41 135	SANTA CRUZ AUTO PARTS, INC.	94056	INVENTORY ORDER	4.37			
65601	06/10/19	42,741.47 002917	SANTA CRUZ METRO TRANSIT W/C	94057	INVENTORY ORDER	45.04			
65602	06/10/19	11,428.10 079	SANTA CRUZ MUNICIPAL UTILITIES	94040	WC REPLENISHMENT	42,741.47			
				93969	4/6-5/7 138 GOLF	1,387.30			
				93970	4/6-5/7 138 GOLF	48.03			
				93971	4/6-5/7 920 PACIFIC	4,633.81			
				93972	4/6-5/7 CEDAR WALNUT	1,050.60			
				93973	4/6-5/7 920 PACIFIC	55.30			
				93974	4/6-5/7 110 VERNON	516.49			
				93975	4/6-5/7 1200 RIVER	306.17			
				93976	4/6-5/7 1200 RIVER B	3,430.40			
				93966	W/E 05/26/19 TEMP	1,205.55			
				93967	W/E 05/26/19 TEMP	836.00			
65603	06/10/19	2,041.55 003292	SLINGSHOT CONNECTIONS LLP	94014	INVENTORY ORDER	1,339.88			
65604	06/10/19	1,339.88 001976	SPORTWORKS NORTHWEST, INC.	93992	EV CHARGING PROJECT	1,788.75			
65605	06/10/19	1,788.75 003447	SUBDYNAMIC LOCATING SERVICES	93947	EMPLOYEE ANNIVERSARY	184.00			
65606	06/10/19	552.14 001040	TERRYBERRY CO., LLC	93948	EMPLOYEE ANNIVERSARY	177.74			
				93949	EMPLOYEE ANNIVERSARY	190.40			
65607	06/10/19	586.64 003231	THE HON COMPANY LLC	94027	OFFICE FURNITURE	586.64			
65608	06/10/19	18,457.79 003010	TOYOTA MATERIAL HANDLING	93993	SCISSOR LIFT	18,457.79			
65609	06/10/19	1,307.69 002207	TY CUSTOM DESIGN	94001	SUPERVISOR BADGES	1,307.69			
65610	06/10/19	34.41 007	UNITED PARCEL SERVICE	94018	FREIGHT	34.41			
65611	06/10/19	154.91 003093	UPS FREIGHT	94045	FREIGHT	154.91			
65612	06/10/19	3,512.91 002829	VALLEY POWER SYSTEMS, INC.	94003	CORE CREDIT	-170.70			
				94004	CORE CREDIT	-87.40			
				94005	INVENTORY ORDER	1,161.94			
				94006	INVENTORY ORDER	963.01			
				94007	INVENTORY ORDER	124.70			
				94008	RPR VEH# 2227	102.63			
				94009	RPR VEH# 2227	920.55			
				94010	INVENTORY ORDER	498.18			
65613	06/10/19	392.16 001165	VU, THANH DR. MD	93996	DMV RENEWAL	75.00			
				93997	DMV RENEWAL	92.16			
				93998	DMV RENEWAL	75.00			
				93999	DMV RENEWAL	75.00			
				94000	DMV RENEWAL	75.00			
65614	06/10/19	44.00 003290	WORKFORCEQA LLC	93952	4/30/19 MRO SERVICES	44.00			
65615	06/11/19	30,254.84 954	DOWNTOWN FORD SALES	94132	CARGO VAN VEH# 1951	30,254.84			
65616	06/11/19	600.00 E929	GUILD, WESLEY	94133	TRAVEL ADVANCE	600.00			
65617	06/17/19	45.80 002941	AA SAFE & SECURITY CO	94162	SCISSOR LIFT KEY	6.54			
				94163	SCISSOR LIFT KEY	39.26			
65618	06/17/19	3,655.65 003151	ABC BUS INC	94117	INVENTORY ORDER	2,110.84			
				94186	TENSTON PULLEY CAMP	868.41			
				94187	INVENTORY ORDER	119.22			

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65619	06/17/19	2,914.07	003283	ACCOUNTEMPS A ROBERT HALF CO		94188	INVENTORY ORDER	557.18	
65620	06/17/19					94156	W/E 05/31/19 TEMP	1,399.68	
65621	06/17/19					94157	W/E 05/31/19 TEMP	1,514.39	
65622	06/17/19	709.32	E930	ALMANZA, CANDIS		94213	TRAVEL EXPENSES	709.32	
65623	06/17/19	573.38	001D	AT&T		94239	5/1-5/31 PT TO PT2	573.38	
65624	06/17/19	360.00	003271	AUTO CARE TOWING		94290	BUS# 1201 TOWING	360.00	
		22.11	002689	B & B SMALL ENGINE CORP		94182	GAL MIX OIL	22.11	
		26,452.50	002035	BOWMAN & WILLIAMS INC		94221	MAR19 GENERATOR	2,778.00	
						94222	APR19 GENERATOR	1,900.00	
						94223	APR19 EV CHG	10,096.50	
						94224	MAY19 EV CHG	11,678.00	
65625	06/17/19	5,582.68	001089	CASEY PRINTING, INC		94215	SUMMER SERVICES 2019	5,582.68	
65626	06/17/19	368.72	001159	CATTO'S GRAPHICS, INC.		94217	BUS STOP STICKERS	368.72	
65627	06/17/19	132.67	003373	CITY OF SANTA CRUZ FINANCE RRF		94251	MAY19 LANDFILL	132.67	
65628	06/17/19	1,702.71	130	CITY OF WATSONVILLE UTILITIES		94087	5/23/19 WASTE WTC	936.30	
						94088	4/15-5/21 RODRIGUEZ	578.91	
						94089	4/15-5/20 RODRIGUEZ	81.69	
						94090	4/15-5/21 RODRIGUEZ	105.81	
65629	06/17/19	10,563.45	909	CLASSIC GRAPHICS		94291	RPR BUS# 2220	10,563.45	
65630	06/17/19	48,985.97	001124	CLEAN ENERGY		94161	VALVE REPAIR KIT	1,921.01	
						94260	5/2/19 LNG CHARGES	6,187.51	
						94261	5/14/19 LNG CHARGES	6,869.09	
						94262	5/16/19 LNG CHARGES	5,797.83	
						94263	5/20/19 LNG CHARGES	6,861.68	
						94264	5/22/19 LNG CHARGES	6,157.16	
						94265	5/24/19 LNG CHARGES	4,502.09	
						94266	5/28/19 LNG CHARGES	5,595.59	
						94267	5/30/19 LNG CHARGES	5,094.01	
65631	06/17/19	1,401.29	075	COAST PAPER & SUPPLY INC.		94168	GARBAGE CONTAINER	42.35	
						94176	INVENTORY ORDER	1,072.73	
						94177	INVENTORY ORDER	286.21	
65632	06/17/19	572.36	002814	CREATIVE BUS SALES, INC.		94118	RPR VEH# 1701-1707	489.59	
						94270	RPR VEH# PC1711	82.77	
65633	06/17/19	2,861.27	003116	CUMMINS PACIFIC LLP		94274	INVENTORY ORDER	1,270.80	
						94275	INVENTORY ORDER	1,451.56	
						94276	INVENTORY ORDER	113.56	
						94277	LOW INVENTORY	25.35	
65634	06/17/19	2,316.00	003210	DEPARTMENT OF FORESTRY & FIRE		94210	PMT 2 LEASE L-2629	2,316.00	
65635	06/17/19	2,316.00	753A	DEPARTMENT OF GENERAL SERVICES		94211	PMT 2 LEASE L-2629	2,316.00	
65636	06/17/19	354.11	900	DEPARTMENT OF TOXIC SUBSTANCE		94244	1/19-3/19 SERVICES	354.11	
65637	06/17/19	443.48	003274	EAST BAY TIRE CO.		94197	REVENUE DISMOUNT	41.60	
						94198	REVENUE DISMOUNT	257.88	
						94208	REVENUE TIRES	144.00	
65638	06/17/19	5,579.11	432	EXPRESS SERVICES INC.		94154	W/E 06/02/19 TEMP	962.55	
						94169	W/E 06/02/19 TEMP	1,135.60	
						94170	W/E 06/02/19 TEMP	480.96	

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65639	06/17/19	4.49	FASTENAL COMPANY INC		94214	W/E 06/02/19 TEMP	3,000.00	
					94158	CREDIT BULBS DAMAGE	-114.07	
					94159	BULBS	112.08	
65640	06/17/19	252.77	FERGUSON ENTERPRISES INC. #795		94160	VEH 4206 HUCK RIVET	6.48	
65641	06/17/19	2,822.59	FLYERS ENERGY LLC		94092	WO# 158490 SMC	252.77	
65642	06/17/19	9,093.26	GARDA CL WEST, INC.		94191	5/16-5/31 FUEL	2,822.59	
65643	06/17/19	1,760.92	GILLIG LLC		94209	JUNE19 VAULT SERVICE	9,093.26	
					94122	INV FIRST AID BOXES	503.16	
					94123	INV FIRST AID BOXES	503.16	
					94195	INVENTORY ORDER	53.20	
					94288	INVENTORY ORDER	701.40	
65644	06/17/19	10,454.23	GRAINGER		94095	TOOL INV FACILITIES	9,001.39	
					94096	TOOL INV FACILITIES	228.83	
					94097	TOOL INV FACILITIES	45.75	
					94099	TOOL INV FACILITIES	104.85	
					94179	TOOL INV FACILITIES	503.77	
					94180	GRID WIRE, ROLLER	88.91	
					94181	GASKET, GRAFFITI RMV	93.60	
					94196	INVENTORY ORDER	54.53	
					94278	VEH# 1950 LED STROBE	154.93	
65645	06/17/19	1,184.34	GREENWASTE RECOVERY, INC.		94279	INV & NON INV ORDER	177.65	
					94229	5/1-5/31 2400 FREEDM	58.36	
					94230	5/1-5/31 246 KINGS	278.49	
					94231	5/1-5/31 GREEN VALLE	58.36	
					94232	5/1-5/31 AIRPORT FRE	58.36	
					94233	5/1-5/31 HIGHWAY BOUL	175.08	
					94234	5/1-5/31 MT HERMON	21.72	
					94235	5/1-5/31 RESEARCH	358.89	
					94236	5/1-5/31 BIG BASIN	58.36	
					94237	5/1-5/31 LOMOND &HWY	58.36	
					94238	5/1-5/31 FREEDOM BOW	58.36	
65646	06/17/19	1,220.65	HOSE SHOP, THE INC		94253	NON INV SHOP SUPPLY	37.13	
					94254	INV TRUCK VALVE	23.13	
					94255	INVENTORY ORDER	46.71	
					94256	NON INV SHOP SUPPLY	171.50	
					94257	NON INV SHOP SUPPLY	76.50	
					94258	INVENTORY ORDER	384.98	
65647	06/17/19	4,535.36	JASPER WELLER LLC		94259	INVENTORY ORDER	480.70	
					94094	TRANSMISSION ITEMS	1,638.40	
					94268	INVENTORY ORDER	4,535.36	
					94269	CREDIT DAMAGED PARTS	-1,638.40	
65648	06/17/19	194.32	JEFFRIES, JOAN		94218	TRAVEL EXPENSE	194.32	
65649	06/17/19	975.00	KAUFMAN DOLOWICH VOLUCK		94225	MAY19 CL# QE-0073	975.00	
65650	06/17/19	481.34	KELLEY'S SERVICE INC.		94192	INVENTORY ORDER	67.23	
					94193	INVENTORY ORDER	66.57	
					94194	INVENTORY ORDER	254.81	

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CHECK NUMBER	CHECK DATE	CHECK VENDOR	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT
65651	06/17/19	421.24 036		KELLY-MOORE PAINT CO., INC.		94280	INV GLOVES	88.38
						94281	VEH# 1950 PARTS	4.35
						94184	PAINT, PAINT FEES	210.62
						94241	PAINT & PAINT FEE	210.62
65652	06/17/19	1,618.82 001052		MID VALLEY SUPPLY INC.		94098	INVENTORY ORDER	1,618.82
65653	06/17/19	320.42 041		MISSION UNIFORM		94185	LAUNDRY SERVICE	34.50
						94206	LAUNDRY SERVICE	50.00
						94207	UNIFORM SERVICE	235.92
65654	06/17/19	109.98 002721		NEXTEL COMMUNICATIONS/SPRINT		94155	4/26-5/25 TMV WIRE	109.98
65655	06/17/19	43.70 003326		NIDAL HALABI & NADA ALGHARIB		94178	NAME PLATE	21.85
						94212	METAL BADGE	21.85
65656	06/17/19	400.48 E671		NOLEN, GREG		94219	TRAVEL EXPENSE	400.48
65657	06/17/19	68,226.40 002940		OJO TECHNOLOGY, INC.		94166	SEC CAM OPS	68,226.40
65658	06/17/19	9,857.55 009		PACIFIC GAS & ELECTRIC		94084	4/26-5/24 1122 RIVER	86.47
						94226	4/25-5/23 1122 RIVER	1,942.55
						94227	4/30-5/29 920 PACIFI	2,687.51
						94228	4/25-5/23 138 GOLF	5,141.02
65659	06/17/19	1,427.52 023		PACIFIC TRUCK PARTS, INC.		94125	INVENTORY ORDER	136.08
						94126	COMPRESSOR CAMPAIGN	3,913.44
						94130	CORE CREDIT	-1,311.00
						94131	CORE CREDIT	-1,311.00
65660	06/17/19	360.64 043		PALACE ART & OFFICE SUPPLY		94127	OFFICE SUPPLIES	31.55
						94292	OFFICE SUPPLIES	178.60
						94293	OFFICE SUPPLIES CREDI	-83.18
						94294	OFFICE SUPPLIES	150.49
						94295	OFFICE SUPPLIES	83.18
65661	06/17/19	425.50 481		PIED PIPER EXTERMINATORS, INC.		94171	JUN19 PEST CONTROL	62.50
						94172	JUN19 PEST CONTROL	190.50
						94173	JUN19 PEST CONTROL	67.50
						94174	JUN19 PEST CONTROL	105.00
65662	06/17/19	103.11 107A		PROBULLD COMPANY LLC		94091	WO# 162743 SMC	20.03
						94164	STENCIL KIT	9.82
						94183	SOLAR FLEX PREM BRSH	73.26
65663	06/17/19	117.99 882		RANDY WEST		94183	BUSINESS CARDS	117.99
65664	06/17/19	5,000.00 003437		RCM ELECTRIC COMPANY, INC.	7	94297	ELEC PANEL @ VERNON	5,000.00
65665	06/17/19	639.17 001153		REPUBLIC ELEVATOR COMPANY INC		94240	JUN19 ELEVATOR MAINT	639.17
65666	06/17/19	807.84 E524		ROCHA, FEDERICO G.		94167	TRAVEL EXPENSE	807.84
65667	06/17/19	895.85 003154		ROMAINE ELECTRIC CORP		94220	INVENTORY ORDER	895.85
65668	06/17/19	156.17 001286		SAFE-CARD ID SERVICES, INC		94296	ID CARDS RETRAN FILM	156.17
65669	06/17/19	3,207.35 001379		SAFETY-KLEEN INC		94242	SUPPLY PARTS WASHER	3,207.35
65670	06/17/19	450.56 135		SANTA CRUZ AUTO PARTS, INC.		94199	INVENTORY ORDER	19.92
						94200	RPR VEH# PC 1123	42.72
						94201	INV/NON INVENTORY	125.05
						94202	INVENTORY ORDER	25.48
						94203	INVENTORY ORDER	11.25
						94204	INVENTORY ORDER	156.30

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CHECK NUMBER	CHECK DATE	CHECK VENDOR	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
65671	06/17/19	718.43 079		SANTA CRUZ MUNICIPAL UTILITIES			GREASE SWEEP	91.69	
							CORE CREDIT	-21.85	
							4/16-5/15 1200 RIVER	107.04	
							4/16-5/15 110 VERNON	404.72	
							5/16-5/31 110 VERNON	85.96	
							5/16-5/31 1200 RIVER	120.71	
65672	06/17/19	240.00 001292		SANTA CRUZ RECORDS MNGMT INC			CART SHRED PICK UP	240.00	
65673	06/17/19	64.85 002459		SCOTT'S VALLEY WATER DISTRICT			5/1-5/31 246 KINGS	64.85	
65674	06/17/19	1,800.00 001277		SJB GLOBALNET, INC.			JUN19 SUPPORT	1,800.00	
65675	06/17/19	1,614.81 003292		SLINGSHOT CONNECTIONS LLP			W/E 6/2/19 TEMP	1,044.81	
							W/E 06/02/19 TEMP	570.00	
65676	06/17/19	463.33 115		SNAP-ON INDUSTRIAL			SHOP TOOL	463.33	
65677	06/17/19	4,980.00 003441		STRATEGIC ECONOMICS, INC.			PACIFIC REDEVELOPMNT	4,980.00	
65678	06/17/19	32,772.50 003425		SYNCHROMATICS CORPORATION			CAD/AVL	32,772.50	
65679	06/17/19	906.91 366		TENNANT COMPANY			TENNANT BATT REPLACE	906.91	
65680	06/17/19	11,379.33 003285		THE AFTERMARKET PARTS CO LLC			INVENTORY ORDER	1,678.45	
							RPR VEH# 1209 TILT	21.06	
							RPR VEH# 1209 TILT	18.17	
							INVENTORY ORDER	17.96	
							INVENTORY ORDER	404.88	
							CREDIT MISSING ITEM	-17.96	
							INVENTORY ORDER	293.68	
							INVENTORY ORDER	1,823.83	
							INVENTORY ORDER	880.85	
							INVENTORY ORDER	690.07	
							INVENTORY ORDER	162.22	
							INVENTORY ORDER	19.16	
							INVENTORY ORDER	404.94	
							INVENTORY ORDER	245.48	
							INVENTORY ORDER	2,523.34	
							CREDIT ITEM BROKEN	-202.48	
							INVENTORY ORDER	202.48	
							INVENTORY ORDER	607.42	
							INVENTORY ORDER	44.62	
							CORE CREDIT	-490.50	
							RPR VEH# 1211	18.17	
							INVENTORY ORDER	1,016.42	
							RPR VEH# 2808	1,017.07	
							INVENTORY ORDER	458.89	
							STROKE STRAPS WHLCHR	135.32	
							INVENTORY ORDER	208.12	
							FREIGHT	57.10	
							INVENTORY ORDER	748.93	
							INVENTORY ORDER	741.52	
							INVENTORY ORDER	585.61	
							CORE CREDIT	-409.69	
65681	06/17/19	458.89 001800		THERMO KING OF SALINAS, INC					
65682	06/17/19	135.32 003415		TRANSFOR CORPORATION					
65683	06/17/19	208.12 003268		TWO GO LLC DBA MONTEREY BAY					
65684	06/17/19	57.10 007		UNITED PARCEL SERVICE					
65685	06/17/19	1,666.37 002829		VALLEY POWER SYSTEMS, INC.					

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65686	06/17/19	242.86 434	VERIZON WIRELESS	0	94247	5/2-6/1 POINT2POINT	242.86	
65687	06/17/19	275.00 003316	WATER TECH SPECIALTIES INC		94093	MAY19 CHEM TESTING	275.00	
65688	06/17/19	2,250.59 003435	WILLIAMS SCOTSMAN, INC.		94129	20X8 FLEX SMC	2,250.59	
65689	06/17/19	194.71 147	ZEE MEDICAL SERVICE CO.		94175	FIRST AID SUPPLIES	55.84	
					94249	FIRST AID SUPPLIES	27.75	
					94250	FIRST AID FACILITIES	111.12	
65690	06/18/19	2,000.00 E992	RIOS, MICHAEL		94353	TRAVEL ADVANCE	2,000.00	
65691	06/24/19	536.82 003151	ABC BUS INC		94317	INVENTORY ORDER	93.70	
					94389	INVENTORY ORDER	443.12	
65692	06/24/19	3,807.49 003283	ACCOUNTEMPS A ROBERT HALF CO		94310	W/E 6/7/19 TEMP	1,749.60	
					94345	W/E 06/07/19 TEMP	2,057.89	
65693	06/24/19	152.25 E1035	ACKEMANN, JAYME		94349	PERSONAL EXPENSES	152.25	
65694	06/24/19	889.38 001D	AT&T		94342	05/10-6/09 INTERNET	889.38	
65695	06/24/19	5,074.25 001348	ATHENS INSURANCE SERVICE, INC.		94350	JUN19 TPA FEES	5,074.25	
65696	06/24/19	4,433.18 538	BARCO PRODUCTS COMPANY		94367	POST SLEEVE BOLLARDS	4,433.18	
65697	06/24/19	113.32 002363	BATTERIES PLUS #314		94304	BATTERY 6V LEAD	113.32	
65698	06/24/19	426.11 001159	CATTO'S GRAPHICS, INC.		94306	EMBROIDERY HATS	426.11	
65699	06/24/19	8,162.83 001124	CLEAN ENERGY		94387	6/3/19 LNG CHARGES	6,964.99	
					94399	BELT SYNC DRIVE	1,197.84	
65700	06/24/19	12,953.44 003034	COASTAL LANDSCAPING INC. DBA		94354	LANDSCAPING VERNON	684.89	
					94355	JUN19 LANDSCAPING	2,890.00	
					94356	LANDSCAPING SVT	9,378.55	
65701	06/24/19	750.00 003204	CREEKSIDE COURT REPORTING LLC		94352	5/28COURT REPORTING	750.00	
65702	06/24/19	32,483.87 003116	CUMMINS PACIFIC LLP		94326	RPR BUS# 1306 PISTON	16,829.74	
					94327	RPR VEH# 1305	16,092.01	
					94328	CORE CREDIT	-546.25	
					94394	CORE CREDIT	-273.13	
65703	06/24/19	1,721.12 157	DELL MARKETING L.P.		94395	LOW INVENTORY	381.50	
					94311	LAPTOP FOR CFO	860.56	
					94312	LAPTOP FOR HR DIRECT	860.56	
65704	06/24/19	123.65 298	ERGOMETRICS& APPLIED PERSONNEL		94351	PC OP TEST VIDEO	123.65	
65705	06/24/19	382.50 002295	FIRST ALARM SECURITY & PATROL		94341	SERVICE CALL & LABOR	382.50	
65706	06/24/19	12,909.24 002952	FLYERS ENERGY LLC		94315	5/16-5/31 PC FUEL	10,735.86	
					94380	6/1-6/15 FUEL	2,173.38	
65707	06/24/19	835.25 647	GENFARE A DIV OF SPX CORP		94368	SOFTWARE UPDATE INST	300.00	
					94369	INVENTORY ORDER	535.25	
65708	06/24/19	986.23 282	GRAINGER		94318	CABINET FOR SHOP	669.94	
					94371	BATTERY CHARGER	114.71	
					94372	STRAPPING	117.33	
					94374	INVENTORY ORDER	32.23	
					94375	PARTS BOXES	24.05	
					94393	INVENTORY ORDER	27.97	
65709	06/24/19	148.77 166	HOSE SHOP, THE INC		94381	HOSE CUTTER BLADES	42.14	
					94382	BULK NON INVENTORY	106.63	
65710	06/24/19	9,225.39 002979	HUNT & SONS, INC.		94313	INVENTORY ORDER	7,450.12	
					94314	INVENTORY ORDER	1,775.27	

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65711	06/24/19	9,070.72 003223	JASPER WELLER LLC	94378	VEH# 2801 TRANSMISSI	4,535.36			
65712	06/24/19	797.95 003442	JOHNSON CONTROLS INC	94379	TRANSMISSION	4,535.36			
65713	06/24/19	519.82 1117	KELLEY'S SERVICE INC.	94364	7/1-9/30 WTC INSPECT	240.17			
65714	06/24/19	476.00 852	LAW OFFICES OF MARIE F. SANG	94365	7/1-9/30 SMC INSPECT	331.74			
65715	06/24/19	832.28 003227	LOBNER, DON	94366	7/1-9/30 SVT INSPECT	226.04			
65716	06/24/19	13,500.00 001303	MAINTSTAR	94332	INVENTORY ORDER	313.00			
65717	06/24/19	9,407.65 003293	MAKAI SOLUTIONS	94333	INVENTORY ORDER	75.78			
65718	06/24/19	21,907.93 003017	MANSFIELD OIL CO OF GAINSVILLE	94334	CLEANER TEST CAN	5.17			
65719	06/24/19	1,774.13 001052	MID VALLEY SUPPLY INC.	94391	INVENTORY ORDER	85.87			
65720	06/24/19	349.39 041	MISSION UNIFORM	94392	INVENTORY ORDER	40.00			
65721	06/24/19	65.55 003326	NIDAL HALABI & NADA ALGHARIB	94385	WC ATTORNEY FEES	476.00			
65722	06/24/19	9,620.92 009	PACIFIC GAS & ELECTRIC	94330	UPRIGHT JACK REPAIR	459.63			
65723	06/24/19	1,865.00 002947	PEDALERS EXPRESS	94331	LOWER JACK REPAIR	372.65			
65724	06/24/19	6.87 107A	PROBUILD COMPANY LLC	94388	6/3-6/7 TRAINING	13,500.00			
65725	06/24/19	675.00 003437	RCM ELECTRIC COMPANY, INC.	94309	SVC CALL INSPECTION	9,407.65			
65726	06/24/19	124.30 061	REGISTER PAJARONIAN LLC	94370	05/28/19 DIESEL	21,907.93			
65727	06/24/19	1,280.00 003420	RICHARD HOWARD	94303	INVENTORY ORDER	1,774.13			
65728	06/24/19	110.43 003024	RICOH USA, INC CA	94308	LAUNDRY SERVICE	34.50			
65729	06/24/19	470.13 135	SANTA CRUZ AUTO PARTS, INC.	94337	LAUNDRY SERVICE	50.00			
65730	06/24/19	567.00 003385	SANTA CRUZ FIRE DEPARTMENT	94338	UNIFORM SERVICE	192.89			
65731	06/24/19	40.00 001292	SANTA CRUZ RECORDS MNGMT INC	94397	LAUNDRY SERVICE	36.00			
65732	06/24/19	206.40 003117	SANTA CRUZ SENTINEL	94398	LAUNDRY SERVICE	36.00			
65733	06/24/19	62.21 570	SCMTD PETTY CASH - CUST SVC	94383	NAME PLATE	65.55			
65734	06/24/19	2,500.00 002267	SHAW / YODER / ANTWHI, INC.	94302	4/25-5/23 110 VERNON	4,682.50			
65735	06/24/19	2,160.87 003292	SLINGSHOT CONNECTIONS LLP	94340	4/30-5/29 1200 RIVER	4,873.70			
65736	06/24/19	1,970.00 002067	SOIL CONTROL LAB	94363	5/6-6/4 246 KINGS #T	64.72			
				94307	MAY19 SERVICES	1,865.00			
				94305	ZINC PH MOD TRSS	6.87			
				94400	TRANSFORMER SRV CALL	675.00			
				94348	06/28/19 PUBLIC HEAR	124.30			
				94301	ADMIN CARPET CLEANIN	1,280.00			
				94299	6/1-6/30 IMAGES	110.43			
				94335	INVENTORY ORDER	51.54			
				94336	CLEANER TEST CAN	10.19			
				94376	INVENTORY ORDER	137.25			
				94377	RPR VEH# 1213,1124	307.53			
				94396	VEH# 1124 & INVENTOR	136.09			
				94402	RETURNED BATTERY	-172.47			
				94339	3/13-6/05 FALSE ALRM	567.00			
				94300	CART SHRED PICK UP	40.00			
				94347	06/12/19 PUBLICATION	206.40			
				94401	REPLENISH - CUST SVC	62.21			
				94346	JUN19 LEGISLATIVE	2,500.00			
				94384	W/E 6/9/19 TEMP	1,419.87			
				94386	W/E 6/9/19 TEMP	741.00			
				94343	1200 RIVER SOIL LABS	985.00			

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65737	06/24/19	244.92 001976	244.92	SPORTWORKS NORTHWEST, INC.		94344	135 GOLF SOIL LABS	985.00	
65738	06/24/19	2,609.76 003285	2,609.76	THE AFTERMARKET PARTS CO LLC		94329	INVENTORY ORDER	244.92	
						94320	RPR VEH# 2316	999.95	
						94321	INVENTORY ORDER	410.54	
						94322	INVENTORY ORDER	821.05	
						94323	INVENTORY ORDER	290.02	
						94324	RPR VEH 2802	2.07	
						94325	RPR VEH# 2802	20.95	
						94390	INVENTORY ORDER	65.18	
65739	06/24/19	40.67 007	40.67	UNITED PARCEL SERVICE		94319	FREIGHT	40.67	
65740	06/24/19	2,458.66 002829	2,458.66	VALLEY POWER SYSTEMS, INC.		94316	INVENTORY ORDER	525.72	
						94357	INVENTORY ORDER	150.14	
						94358	FREIGHT	15.30	
						94359	INVENTORY ORDER	99.11	
						94360	INVENTORY ORDER	1,007.58	
						94361	INVENTORY ORDER	620.03	
						94362	INVENTORY ORDER	40.78	
65741	06/24/19	2,380.00 001353	2,380.00	VISION COMMUNICATIONS		94373	4201,2,3,6 RADIOS	2,380.00	
65742	06/24/19	2,155.21 003273	2,155.21	MGP XI REIT LLC		94443	JULY19 RENT	2,155.21	
65743	06/24/19	15,604.25 001075	15,604.25	SOQUEL III ASSOCIATES	7	94444	JULY19 RENT	15,604.25	
65854	06/28/19	48.55 M041	48.55	GOUVEIA, ROBERT	0	94498	JUL19 RETIREE SUPP	48.55	
65855	06/28/19	48.55 M109	48.55	PEREZ, CHERYL	0	94499	JUL19 RETIREE SUPP	48.55	
65856	06/28/19	97.09 M085	97.09	ROSSI, DENISE	0	94500	JUL19 RETIREE SUPP	97.09	
65857	06/28/19	48.55 M088	48.55	YAGI, RANDY	0	94501	JUL19 RETIREE SUPP	48.55	
TOTAL		996,701.16	996,701.16	ACCOUNTS PAYABLE			TOTAL CHECKS	996,701.16	241

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CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
65799	07/01/19	1,798.22	ABC BUS INC		94458	INVENTORY ORDER	1,724.69	
					94459	INVENTORY ORDER	73.53	
65800	07/01/19	3,186.70	ACCOUNTTEMPS A ROBERT HALF CO		94467	W/E 6/14/19 TEMP	1,787.02	
					94468	W/E 06/14/19 TEMP	1,399.68	
65801	07/01/19	787.50	ACTION TOWING & ROAD SVC CORP		94463	VEH# 4202 TOWING	787.50	
65802	07/01/19	33.57	ALWAYS UNDER PRESSURE		94489	PRESSURE HOSE MMF	33.57	
65803	07/01/19	6,621.32	AT&T		94412	5/13-6/12 PT 2 PT	1,823.76	
					94478	05/19-6/18 MAIN ACCT	4,652.80	
					94479	5/19-6/18 OPS ELEVAT	144.76	
65804	07/01/19	226.92	BAY ALARM COMPANY		94470	7/1-10/1 QTRLY FIRE	226.92	
65805	07/01/19	1,215.00	BOWMAN & WILLIAMS INC		94406	MAY19 PACIFIC STATIO	1,215.00	
65806	07/01/19	22.81	BRASS KEY LOCKSMITH INC		94431	VEH# 1951 KEYS	22.81	
65807	07/01/19	4,337.16	CAPITOL CLUTCH & BRAKE, INC.		94471	INVENTORY	4,337.16	
65808	07/01/19	400.95	CATTO'S GRAPHICS, INC.		94491	PARKING RULE SIGNS	400.95	
65809	07/01/19	1,149.52	CITY OF SANTA CRUZ-FINANCE		94493	7/1/19 PARKING	639.52	
					94494	7/1/19 PARKING	510.00	
65810	07/01/19	54.35	CITY OF WATSONVILLE UTILITIES		94477	5/14-6/13 WTC	54.35	
65811	07/01/19	679.50	CLAREMONT EAP		94416	JULY19 EAP	679.50	
65812	07/01/19	269.50	COMMUNITY TELEVISION OF		94446	5/17 REG BOARD MEET	269.50	
65813	07/01/19	5,271.72	CUMMINS PACIFIC LLP		94420	CRITICALLY LOW INV	13.37	
					94421	RPR VEH# 1005	5,258.35	
65814	07/01/19	32.00	DEPARTMENT OF JUSTICE		94464	MAY 19 FINGERPRINTING	32.00	
65815	07/01/19	575.50	DOCTORS ON DUTY MEDICAL CLINIC		94475	MAY 19 DRUG TESTING	575.50	
65816	07/01/19	1,026.19	EAST BAY TIRE CO.		94460	TIRES	538.76	
					94462	TIRES	487.43	
65817	07/01/19	4,452.23	EXPRESS SERVICES INC.		94403	W/E 6/16/19 TEMP	3,543.75	
					94437	W/E 6/16/19 TEMP	908.48	
65818	07/01/19	89.09	FERGUSON ENTERPRISES INC. #795		94473	W/O 163763 MMF	89.09	
65819	07/01/19	1,723.83	FIS		94461	MAY 19 MERCHANT FEES	1,723.83	
65820	07/01/19	21.56	FLYERS ENERGY LLC		94429	PROPANE FORKLIFTS	21.56	
65821	07/01/19	57.26	FRONTIER COMMUNICATIONS - 3025		94480	209-025-0541-0613025	57.26	
65822	07/01/19	57.26	FRONTIER COMMUNICATIONS - 6145		94418	209-091-6033-1126145	57.26	
65823	07/01/19	160.02	GRAINGER		94410	GLASS SCRAPER MMF	119.94	
					94435	FLAT REFLECTOR MMF	23.26	
					94436	ELECTRIC BALLAST MMF	16.82	
65824	07/01/19	84,959.95	HANSON BRIDGETT LLP		94448	MAY19 RETAINER	24,000.00	
					94449	M# 032117.006001	1,189.00	
					94450	M# 032117.006006	840.00	
					94451	M#032117.006012	21,553.70	
					94452	M#032117.006013	33,061.30	
					94453	M#032117.006015	715.00	
					94454	M#032117.006016	1,840.95	
					94455	M#032117.006017	760.00	
					94456	M#032117.006018	480.00	
					94457	M#032117.008001	520.00	
65825	07/01/19	43.21	HOSE SHOP, THE INC		94441	HOSE,COUPLING,CRIMP	43.21	

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65826	07/01/19	1,107.58 003327	IO, RODNEY H		94434	RPR VEH# PC1705	553.79	
65827	07/01/19	6.50 1117	KELLEY'S SERVICE INC.		94472	RPR VEH# PC1708	553.79	
65828	07/01/19	157.62 003059	MAILFINANCE INC		94430	RPR VEH# 1005	6.50	
65829	07/01/19	18,442.46 003017	MANSFIELD OIL CO OF GAINSVILLE		94495	6/28-7/27 LEASE	157.62	
65830	07/01/19	281.50 003249	MAXIMUM OIL SERVICE LLC		94422	6/11/19 DIESEL FUEL	18,442.46	
65831	07/01/19	1,480.73 E1020	MENGISTU, WONDIMU		94439	6/19 WASTE OIL P/U	281.50	
65832	07/01/19	1,329.74 406	MESITI-MILLER ENGINEERING, INC 0		94404	TRAVEL EXPENSE	1,041.75	
65833	07/01/19	290.59 041	MISSION UNIFORM		94415	TRAVEL EXPENSE	438.98	
65834	07/01/19	1,400.00 E045	MONTESINO, EDUARDO		94414	STRUCTURAL EVAL ADMI	1,329.74	
65835	07/01/19	5,294.39 002951	MOORE & ASSOCIATES, INC.		94432	LAUNDRY SERVICE	50.00	
65836	07/01/19	4,789.85 004	NORTH BAY FORD LINC-MERCURY		94433	UNIFORM SERVICE	206.09	
65837	07/01/19	2,203.67 009	PACIFIC GAS & ELECTRIC		94440	LAUNDRY SERVICE	34.50	
65838	07/01/19	147.50 481	PIED PIPER EXTERMINATORS, INC.		94445	TRAVEL ADVANCE	1,400.00	
65839	07/01/19	2,662.25 187	POLAR RADIATOR SERVICE INC		94413	RIDERSHIP SURVEY	5,294.39	
65840	07/01/19	19.45 107A	PROBULLD COMPANY LLC		94424	RPR VEH# PC1107	4,437.50	
65841	07/01/19	96.14 882	RANDY WEST	7	94425	VEH# 1951 KEYS	563.73	
65842	07/01/19	36.68 003024	RICOH USA, INC CA		94426	CREDIT RETURN	-211.38	
65843	07/01/19	23.87 E973	RUBIO, ARASELI		94411	5/6-6/4 WTC,PNR,SVT	2,203.67	
65844	07/01/19	69.79 135	SANTA CRUZ AUTO PARTS, INC.		94407	JUN19 PEST SVC WTC	77.50	
65845	07/01/19	11,466.85 079	SANTA CRUZ MUNICIPAL UTILITIES		94474	JUN19 110 VERNON ST	70.00	
65846	07/01/19	374.46 788	SCMTD PETTY CASH - FINANCE		94465	RPR VEH#2303 RADIATO	2,662.25	
65847	07/01/19	2,752.36 003434	SERVPRO OF SANTA CRUZ/SANTA CL		94408	TILE GROUT MMF	10.61	
65848	07/01/19	1,065.24 003285	THE AFTERMARKET PARTS CO LLC		94409	DOOR STOP SMC	8.84	
65849	07/01/19	12,716.36 057	U.S. BANK		94492	BUSINESS CARDS	96.14	
65850	07/01/19	34.41 007	UNITED PARCEL SERVICE		94405	MAY19 IMAGES ONLY	36.68	
65851	07/01/19	318.00 002829	VALLEY POWER SYSTEMS, INC.		94447	TRAVEL EXPENSE	23.87	
65852	07/01/19	912.24 434	VERIZON WIRELESS		94470	INVENTORY ORDER	69.79	
65853	07/01/19	9,603.75 001043	VISION SERVICE PLAN	0	94442	NEW ACCT 920 PACIFIC	354.43	
					94481	5/8-6/7 110 VERNON	516.49	
					94482	5/8-6/7-1200 RIVER S	276.53	
					94483	5/8-6/7 138 GOLF CLU	35.77	
					94484	5/8-6/7 920 PACIFIC	70.12	
					94485	5/8-6/7 920 PACIFIC	4,196.11	
					94486	5/8-6/7 CEDAR WALNUT	1,050.60	
					94487	5/8-6/7 1200 RIVER	3,504.95	
					94488	5/8-6/7 138 GOLF	1,461.85	
					94476	PETTY CASH REPLENISH	374.46	
					94438	MOLD REMED CS BOOTH	2,752.36	
					94423	CREDIT TAKEN TWICE	490.50	
					94466	INVENTORY ORDER	39.77	
					94469	CAMPAIGN PARTS	534.97	
					94497	*****-****-5056	12,716.36	
					94428	FREIGHT	34.41	
					94427	INVENTORY ORDER	318.00	
					94419	5/13-6/12 BUS WIFI	912.24	
					94496	JUL19 VSP COVERAGE	9,603.75	

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65858	07/08/19	3,800.77 003283	ACCOUNTEMPS A ROBERT HALF CO		94507	W/E 6/21/19 TEMP	1,749.60	
					94548	W/E 6/21/19 TEMP	2,051.17	
65859	07/08/19	195,754.34 003362	APOLLO VIDEO TECHNOLOGY LLC		94506	CAMERA ON BUS #2	202,006.34	
					94555	CREDIT MEMO	-6,252.00	
65860	07/08/19	442.66 001D	AT&T		94502	5/19-6/18 DAVENPORT	161.95	
					94503	5/19-6/18 OCEAN	280.71	
65861	07/08/19	450.00 003271	AUTO CARE TOWING		94504	VEH# PC1120 TOWING	162.00	
					94505	VEH #1203 TOWING	288.00	
65862	07/08/19	5,805.51 002802	BATTERY SYSTEMS CORP		94508	BATTERIES	5,805.51	
					94581	TRAINING	5,625.00	
65863	07/08/19	5,625.00 014	CABRILLO COLLEGE		94549	5/1-5/1/20 LIABILITY	578,199.00	
					94549	5/1-5/1/20 VPD	101,438.00	
65864	07/08/19	679,637.00 588	CALTIP		94556	OFFICE SUPPLIES	151.86	
					94509	PERSONAL EXPENSES	76.00	
65865	07/08/19	151.86 914	CALTRONICS BUSINESS SYSTEMS		94584	REFUND-CCAH	200.00	
					94578	06/20/19 SOLID WASTE	1,029.93	
65866	07/08/19	76.00 E1036	CARRANCO BERNABE, JOSE		94576	5/21-6/18 RODRIGUEZ	91.21	
					94577	5/21-6/18 RODRIGUEZ	474.36	
65867	07/08/19	200.00 T334	CENTRAL CA ALLIANCE FOR HEALTH		94589	5/20-6/17 RODRIGUEZ	89.45	
					94510	TEFLON CARPET PROTEC	47.61	
65868	07/08/19	1,684.95 130	CITY OF WATSONVILLE UTILITIES		94585	TRAVEL EXPENSE	26.98	
					94586	TRAVEL EXPENSE	426.90	
					94587	TRAVEL EXPENSE	1,003.88	
65869	07/08/19	47.61 075	COAST PAPER & SUPPLY INC.		94512	TIRES	127.50	
					94513	TIRES	3,144.31	
65870	07/08/19	26.98 E1022	CRUMMIE, DAWN		94514	TIRES	1,048.10	
					94515	TIRES	385.75	
65871	07/08/19	1,430.78 E443	CURREA, JULIO		94516	TIRES	331.35	
					94517	FLAT REPAIR	25.00	
65872	07/08/19	6,408.90 003274	EAST BAY TIRE CO.		94518	TIRES	538.76	
					94519	TIRES	808.13	
65873	07/08/19	1,464.76 003445	ES WEST COAST LLC		94511	GEN MAINT REPAIR PAR	1,464.76	
					94520	W/E 6/23/19 TEMP	2,962.50	
65874	07/08/19	14,807.94 432	EXPRESS SERVICES INC.		94563	W/E 5/26 TEMP	604.80	
					94564	W/E 5/19 TEMP	1,008.00	
					94565	W/E 5/12 TEMP	1,008.00	
					94566	W/E 5/5 TEMP	1,008.00	
					94567	W/E 4/28 TEMP	1,008.00	
					94568	W/E 4/21 TEMP	1,008.00	
					94569	W/E 4/14 TEMP	1,008.00	
					94570	W/E 4/07 TEMP	1,008.00	
					94571	W/E 3/31 TEMP	1,009.44	
					94572	W/E 3/24 TEMP	1,008.00	
					94573	W/E 3/10, 3/17 TEMP	2,167.20	
65875	07/08/19	31.79 372	FEDERAL EXPRESS		94522	FED EX OVERNIGHT	31.79	
					94523	MAY 19 SECURITY	46,550.89	
65876	07/08/19	46,550.89 002295	FIRST ALARM SECURITY & PATROL					

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65877	07/08/19	8,777.86 002952	8,777.86	FLYERS ENERGY LLC		94521	6/1-6/15 FUEL PC	8,777.86	
65878	07/08/19	200.15 647	200.15	GENFARE A DIV OF SPX CORP		94524	INVENTORY	200.15	
65879	07/08/19	4,535.36 003223	4,535.36	JASPER WELLS LLC		94554	WELLS TRANSMISSION	4,535.36	
65880	07/08/19	280.13 1117	280.13	KELLEY'S SERVICE INC.		94525	RPR VEH# 1950	16.08	
						94526	INVENTORY	264.05	
65881	07/08/19	2,600.00 E1026	2,600.00	MAYWEATHER, ANSON		94527	TUITION REIMBURSEMENT	2,600.00	
65882	07/08/19	987.50 003361	987.50	MILLER MAXFIELD INC		94528	DESIGN GRAPHIC SOCIA	987.50	
65883	07/08/19	21.00 041	21.00	MISSION UNIFORM		94561	UNIFORMS & LAUNDRY	10.50	
						94562	UNIFORMS & LAUNDRY	10.50	
65884	07/08/19	746.32 009	746.32	PACIFIC GAS & ELECTRIC		94574	05/09-06/09 RESEARCH	746.32	
65885	07/08/19	1,021.17 043	1,021.17	PALACE ART & OFFICE SUPPLY		94560	OFFICE SUPPLIES	1,021.17	
65886	07/08/19	147.49 050	147.49	PITNEY BOWES INC. RENTAL PMT		94530	7/1-9/30 POSTAGE	147.49	
65887	07/08/19	625.01 107A	625.01	PROBULLD COMPANY LLC		94537	RPR CLOSET	304.71	
						94538	RPR CLOSET	123.02	
						94539	RPR C/S FAUCET	3.63	
						94540	RPR C/S FAUCET	113.06	
						94541	RPR C/S FAUCET	3.63	
						94550	TOOL	40.41	
						94551	INVENTORY ORDER	25.27	
						94552	INVENTORY ORDER	1.10	
						94553	PICTURE HANGER HOOK	10.18	
65888	07/08/19	229.95 003020	229.95	QUEST DIAGNOSTIC INC.	7	94531	LAB SERVICES	229.95	
65889	07/08/19	2,229.79 882	2,229.79	RANDY WEST		94529	VEHICLE FORM	865.26	
						94559	FORMS	1,364.53	
65890	07/08/19	262.88 003024	262.88	RICOH USA, INC CA		94532	5/12-6/9 COPIER	1,29.32	
						94534	6/10-7/9/19 MAINT	66.80	
65891	07/08/19	267.66 215	267.66	RICOH USA, INC. TX		94533	LEASE FY20 7/3-8/2	66.76	
65892	07/08/19	61.21 045	61.21	ROYAL WHOLESALE ELECTRIC		94580	INVENTORY ORDER	267.66	
65893	07/08/19	143.72 135	143.72	SANTA CRUZ AUTO PARTS, INC.		94536	INVENTORY	61.21	
65894	07/08/19	2,170.94 003292	2,170.94	SLINGSHOT CONNECTIONS LLP		94535	W/E 6/16/19 TEMP	143.72	
						94542	W/E 6/16/19 TEMP	760.00	
65895	07/08/19	383.13 003285	383.13	THE AFTERMARKET PARTS CO LLC		94543	INVENTORY	1,410.94	
						94544	INVENTORY	337.06	
65896	07/08/19	150.14 002829	150.14	VALLEY POWER SYSTEMS, INC.		94544	INVENTORY ORDER	46.07	
65897	07/08/19	99.41 E1038	99.41	VASCONES, JORDAN		94579	REIMB FOR TONER	150.14	
65898	07/08/19	308.92 434	308.92	VERIZON WIRELESS	0	94557	05/02-06/01 PARACRUZ	99.41	
65899	07/08/19	32.00 003290	32.00	WORKFORCEQA LLC		94546	DOT DRUG TESTING	308.92	
65900	07/08/19	405.46 148	405.46	ZEP SALES & SERVICE INC.		94547	INVENTORY	32.00	
65901	07/15/19	90.00 002069	90.00	A TOOL SHED, INC.		94692	TRAILER RENTAL	405.46	
65902	07/15/19	41.10 003151	41.10	ABC BUS INC		94595	INVENTORY	90.00	
65903	07/15/19	4,262.25 003283	4,262.25	ACCOUNTTEMPS A ROBERT HALF CO		94597	W/E 6/28/19 TEMP	41.10	
						94598	W/E 6/28/19 TEMP	1,279.40	
						94599	W/E 6/28/19 TEMP	2,063.87	
65904	07/15/19	385.00 003089	385.00	ACTION AUTO GLASS DBA FOR		94602	VEH# PC1122 WINDSHIE	918.98	
65905	07/15/19	5,000.00 1114	5,000.00	ALLIANT INSURANCE SERVICES INC		94601	FY20 W/C BROKER FEE	385.00	

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65906	07/15/19	582.97	ALWAYS UNDER PRESSURE		94600	INVENTORY	582.97
65907	07/15/19	2,771.00	AMERICAN BUSINESS SYSTEMS, INC		94596	7/1-6/30/20 MAINTENA	2,771.00
65908	07/15/19	573.38	AT&T		94693	6/1-6/30 2PT 2WTC	573.38
65909	07/15/19	997.42	AT&T MOBILITY		94594	05/24-06/23 WIFI BUS	997.42
65910	07/15/19	5,074.25	ATHENS INSURANCE SERVICE, INC.		94688	JULY 19 TPA FEES	5,074.25
65911	07/15/19	1,332.00	AUTO CARE TOWING		94603	VEH# 1205 TOWING	288.00
					94689	VEH# 2232 TOWING	288.00
					94690	VEH# 2311 TOWING	396.00
					94691	VEH# 2805 TOWING	360.00
65912	07/15/19	428.16	BUDGET BLINDS OF SANTA CRUZ	7	94694	BLINDS 920 PACIFIC	428.16
65913	07/15/19	11,014.90	CALTRIP		94607	JUNE19 CODE 5100	11,014.90
65914	07/15/19	386.75	CALTRONICS BUSINESS SYSTEMS		94591	INVENTORY ORDER	147.49
					94612	INVENTORY	239.26
65915	07/15/19	15,750.00	CAPITALEDDGE ADVOCACY, INC.		94592	MAY 19 SERVICES	5,250.00
					94605	JUNE 19 SERVICES	5,250.00
					94606	JUNE 19 SERVICES	5,250.00
65916	07/15/19	136.56	CATTO'S GRAPHICS, INC.		94698	KISS AND RIDE SIGNS	136.56
65917	07/15/19	298.12	CDW GOVERNMENT, INC.		94608	APC-BACK UPS	298.12
65918	07/15/19	785.34	CHEVROLET OF WATSONVILLE LLC	7	94623	VEH# 1950 KEYS	785.34
65919	07/15/19	41,177.12	CITRIX SYSTEMS INC.		94701	7/2-7/1/24	41,177.12
65920	07/15/19	3,482.47	CITY OF SANTA CRUZ-FINANCE		94697	JULY19 COOP RETAIL	3,482.47
65921	07/15/19	253.70	CITY OF SANTA CRUZ FINANCE RRF		94699	JUNE 19 LANDFILL	253.70
65922	07/15/19	32,761.04	CLEAN ENERGY		94617	6/5 LNG	5,224.60
					94618	6/7 LNG	2,098.21
					94619	6/11 LNG	6,976.65
					94620	6/13 LNG	6,294.61
					94621	6/19 LNG	5,243.79
					94622	6/17 LNG	6,923.18
65923	07/15/19	190.62	COAST PAPER & SUPPLY INC.		94604	INVENTORY	190.62
65924	07/15/19	2,890.00	COASTAL LANDSCAPING INC. DBA		94696	JULY 19 LANDSCAPE	2,890.00
65925	07/15/19	3,000.00	CREEKSIDE COURT REPORTING LLC		94609	COURT RECORDING	750.00
					94610	COURT RECORDING	750.00
					94695	7/8 REPORTING	750.00
					94702	6/24/19 REPORTING	750.00
65926	07/15/19	158,074.00	CSAC EXCESS INSURANCE AUTHORITY		94611	FY20 W/C INSURANCE	158,074.00
65927	07/15/19	6,813.61	CUMMINS PACIFIC LLP		94613	VEH# 1203 INVENTORY	2,777.05
					94614	INVENTORY	189.36
					94615	VEH# 2809 INVENTORY	89.03
					94616	INVENTORY	4,339.88
					94700	WATER PUMP 1305 1306	729.30
					94737	CREDIT MEMO	-273.13
					94738	CREDIT MEMO	-273.13
					94739	CREDIT MEMO	-764.75
65928	07/15/19	160.00	DEPARTMENT OF JUSTICE		94703	JUNE 19 FINGERPRINTI	160.00
65929	07/15/19	3,983.34	DYNAMIC SYSTEMS INC		94624	2/28-2/28/20	2,306.58
					94625	2/4-2/3/20 SUPPORT	1,676.76

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65930	07/15/19	3,314.78	EAST BAY TIRE CO.		94630	TIRES	112.50	
					94631	TIRES	1,077.51	
					94632	TIRES	538.76	
					94633	TIRES	399.65	
					94704	TIRES	192.88	
					94705	TIRES	993.48	
65931	07/15/19	3,046.75	ENVIRONMENTAL LOGISTICS INC		94707	1200 RIVER HAZARD	3,046.75	
65932	07/15/19	350.00	EPICOR SOFTWARE CORP		94590	SYSTEM STABILIZATION	350.00	
65933	07/15/19	150.00	ESQUEDA MINDY		94629	BOD MEETING INTERPRE	150.00	
65934	07/15/19	546.05	ESTRADA, URIEL		94710	TRAVEL REIMBURSEMENT	546.05	
65935	07/15/19	450.00	EXPRESS FENCE LLP		94706	6/7-12/7 FENCE RENTA	450.00	
65936	07/15/19	6,963.32	EXPRESS SERVICES INC.		94626	W/E 6/9/19 TEMP	1,242.00	
					94627	W/E 6/23 TEMP	1,135.60	
					94628	W/E 6/30/19 TEMP	384.00	
					94708	W/E 7/7 TEMP	1,930.52	
					94709	W/E 6/30 TEMP	2,271.20	
65937	07/15/19	2,241.93	FLYERS ENERGY LLC		94635	6/16-6/30 FUEL	2,241.93	
65938	07/15/19	306.90	GARDA CL WEST, INC.		94722	JULY 19 SERVICES	306.90	
65939	07/15/19	251.92	GENFARE A DIV OF SPX CORP		94637	INVENTORY	68.59	
					94638	INVENTORY	55.28	
					94723	INVENTORY	128.05	
65940	07/15/19	6,457.11	GILLIG LLC		94636	BUS UPHOLSTERY	6,457.11	
65941	07/15/19	1,229.28	GRAINGER		94639	INVENTORY	770.74	
					94640	INVENTORY	110.73	
					94641	INVENTORY	347.81	
65942	07/15/19	328.99	IO, RODNEY H		94643	VEH# PC1106	328.99	
65943	07/15/19	9,070.72	JASPER WELLESER LLC		94686	CAMPAIGN TRANSMISSIO	4,535.36	
					94687	CAMPAIGN TRANSMISSIO	4,535.36	
65944	07/15/19	353.85	JEFFRIES, JOAN		94711	TRAVEL REIMBURSEMENT	353.85	
65945	07/15/19	206.15	KELLEY'S SERVICE INC.		94646	VEH# 805 REPAIR	46.54	
					94735	VEH# 805 REPAIR	308.06	
					94736	CREDIT MEMO	-82.90	
					94736	CREDIT MEMO	-65.55	
65946	07/15/19	8,875.00	KL2 CONNECTS LLC		94644	PLAN & DEVELOP DIR	8,875.00	
65947	07/15/19	674.00	LETTER PUBLICATIONS		94712	2YR SUBSCRIPTION	674.00	
65948	07/15/19	3,536.88	MAKAI SOLUTIONS		94650	INVENTORY	2,667.03	
					94651	INVENTORY	869.85	
65949	07/15/19	36,317.42	MARSH USA INC		94648	7/1-7/1/20 EPLI RENE	29,951.42	
					94649	7/1-7/1/20 CYBER LIA	6,366.00	
65950	07/15/19	498.08	MCMaster-CARR SUPPLY CO		94724	REPAIRS & MAINTENANC	498.08	
65951	07/15/19	1,673.84	MID VALLEY SUPPLY INC.		94725	INVENTORY	1,673.84	
65952	07/15/19	643.70	MISSION UNIFORM		94652	UNIFORMS	36.00	
					94653	UNIFORMS	36.00	
					94654	UNIFORMS	34.50	
					94655	UNIFORMS	10.50	
					94656	UNIFORMS	50.00	

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SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
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CHECK NUMBER	CHECK DATE	CHECK VENDOR	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
65953	07/15/19	5,000.00	003291	MONTREY BAY ECON PARTNERSHIP		94657	UNIFORMS	194.35	
65954	07/15/19	3,968.00	003219	MSDS ONLINE INC.		94658	UNIFORMS	36.00	
65955	07/15/19	200.00	003061	NEOFUNDS BY NEOPOST DBA		94659	UNIFORMS	50.00	
65956	07/15/19	175.00	004	NORTH BAY FORD LINC-MERCURY		94660	UNIFORMS	196.35	
65957	07/15/19	90.90	002323	NORTHERN SAFETY CO., INC.		94661	ANNUAL MEMBERSHIP	5,000.00	
65958	07/15/19	185.00	002940	OJO TECHNOLOGY, INC.		94662	POSTAGE	3,968.00	
65959	07/15/19	12,601.42	009	PACIFIC GAS & ELECTRIC		94663	VEH #PC1703 LEAK REP	200.00	
						94664	INVENTORY	175.00	
						94665	#12 CAMERA REPAIR	185.00	
						94666	5/25-6/25 112 RIVER	44.57	
						94667	5/24-6/24 110 VERNON	5,597.18	
						94668	5/24-6/24 1122 RIVER	1,897.24	
						94669	5/24-6/24 138 GOLF C	5,062.43	
65960	07/15/19	9,771.00	001318	PROFESSIONAL ASBESTOS REMOVAL		94670	ASBESTOS 1217 RIVER	9,771.00	
65961	07/15/19	295.00	481	PIED PIPER EXTERMINATORS, INC.		94671	JUNE PEST BETTYS	60.00	
						94672	JULY19 PEST OPS	62.50	
						94673	JULY19 PEST OPS CREE	105.00	
						94674	JULY19 PEST MMF	67.50	
65962	07/15/19	36.06	107A	PROBUILD COMPANY LLC		94675	INVENTORY	55.13	
						94676	INVENTORY	0.78	
						94677	CREDIT MEMO	-19.85	
65963	07/15/19	40,878.32	942	PROFPOINT, INC.		94678	7/1-7/30/20 SERVICES	40,878.32	
65964	07/15/19	141.12	E969	PYE, GINA		94679	PERSONAL EXPENSES	141.12	
65965	07/15/19	255.50	003020	QUEST DIAGNOSTIC INC.		94680	JUN 19 LAB SERVICES	255.50	
65966	07/15/19	549.53	882	RANDY WEST	7	94681	BUSINESS CARDS	96.14	
						94682	FORMS	453.39	
65967	07/15/19	46.00	E1015	RAYGOZA-RAMIREZ, JOSE		94683	PERSONAL REIMBURSEM	46.00	
65968	07/15/19	124.12	003024	RICOH USA, INC CA		94684	5/12-6/11 1200 RIVER	66.80	
						94685	3/24-6/23 ADD IMAGES	57.32	
65969	07/15/19	573.56	003154	ROMAINE ELECTRIC CORP		94686	INVENTORY	573.56	
65970	07/15/19	20.59	135	SANTA CRUZ AUTO PARTS, INC.		94687	INVENTORY	20.59	
65971	07/15/19	59.90	848	SANTA CRUZ ELECTRONICS, INC.		94688	INVENTORY	59.90	
65972	07/15/19	38,528.58	002917	SANTA CRUZ METRO TRANSIT W/C		94689	JUNE19 W/C REPLENIS	38,528.58	
65973	07/15/19	400.00	003117	SANTA CRUZ SENTINEL	0	94690	JUNE 19 PUBLICATIONS	400.00	
65974	07/15/19	4,542.62	003292	SLINGSHOT CONNECTIONS LLP		94691	W/E 6/23 TEMP	921.50	
						94692	W/E 6/30 TEMP	1,330.57	
						94693	W/E 6/30 TEMP	893.00	
						94694	W/E 6/23 TEMP	1,397.55	
65975	07/15/19	4,588.50	002812	STRONGHOLD SECURITY INC.		94695	FIREWALL	4,588.50	
65976	07/15/19	179.79	001040	TERRYBERRY CO., LLC		94696	EMPLOYEE INCENTIVE	179.79	
65977	07/15/19	3,707.99	003285	THE AFTERMARKET PARTS CO LLC		94697	INVENTORY	135.00	
						94698	INVENTORY	3,572.99	
65978	07/15/19	1,080.00	003010	TOYOTA MATERIAL HANDLING	7	94699	AERIAL LIFT TRAINING	1,080.00	
65979	07/15/19	66.17	007	UNITED PARCEL SERVICE		94700	FREIGHT	66.17	
65980	07/15/19	154.91	003093	UPS FREIGHT		94701	060719 FREIGHT OUT	154.91	

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65981	07/15/19	002829	165.00	VALLEY POWER SYSTEMS, INC.		94684	VEH# 2809, 2810	315.14	
65982	07/15/19	E1038	280.00	VASCONES, JORDAN		94733	CREDIT MEMO	-150.14	
65983	07/15/19	003316	275.00	WATER TECH SPECIALTIES INC		94593	TRAVEL EXPENSE REIMB	280.00	
65984	07/22/19	003151	41.10	ABC BUS INC		94685	JUNE19 TEST 110 VERN	275.00	
65985	07/22/19	80 192	330.80	ALWAYS UNDER PRESSURE		94829	INVENTORY	41.10	
65986	07/22/19	002861	32.67	AMERICAN MESSAGING SVCS, LLC		94758	PRESSURE WASHER RPR	330.80	
65987	07/22/19	003271	396.00	AUTO CARE TOWING		94769	JULY 19 PAGERS	32.67	
65988	07/22/19	616	1,500.00	BROWN ARMSTRONG ACCOUNTANCY		94760	VEH# 103 TOWING	108.00	
65989	07/22/19	001124	21,565.25	CLEAN ENERGY		94761	VEH #9816 TOWING	288.00	
65990	07/22/19	E957	181.24	CLIFFORD, ALEX		94790	FY18 NTD AUP	1,500.00	
65991	07/22/19	075	1,127.11	COAST PAPER & SUPPLY INC.		94765	6/7 LNG	4,981.26	
65992	07/22/19	002814	932.40	CREATIVE BUS SALES, INC.		94766	6/27 LNG	5,358.26	
65993	07/22/19	003452	745.23	CRIMSON INTERACTIVE INC		94767	6/25 LNG	6,842.98	
65994	07/22/19	002953	10,572.51	EPICOR SOFTWARE CORP		94768	6/21 LNG	4,382.75	
65995	07/22/19	298	155.04	ERGOMETRICS& APPLIED PERSONNEL		94742	PERSONAL REIMBURSEME	181.24	
65996	07/22/19	432	4,598.40	EXPRESS SERVICES INC.		94815	SEAT PROTECTORS	519.16	
65997	07/22/19	002952	8,655.47	FLYERS ENERGY LLC		94816	INVENTORY	607.95	
65998	07/22/19	E1039	3,669.18	FRANCIS, RUFUS		94763	VEH# PC1715 RPR	245.23	
65999	07/22/19	001302	9,093.26	GARDA CL WEST, INC.		94764	VEH# PC1709 RPR	687.17	
66000	07/22/19	117	389.09	GILLIG LLC		94779	ENG TO CHINESE TRANS	745.23	
66001	07/22/19	001323	12,797.03	GOVDELIVERY LLC		94770	7/1-6/30/20 MAINT	10,572.51	
66002	07/22/19	001097	1,184.34	GREENWASTE RECOVERY, INC.		94782	TRANSIT OPT TEST/SCO	155.04	
						94755	W/E 7/7 TEMP	768.00	
						94771	W/E 6/2 TEMP	806.40	
						94772	W/E 6/23 TEMP	1,008.00	
						94773	W/E 6/16 TEMP	1,008.00	
						94774	W/E 6/30 TEMP	1,008.00	
						94796	6/16-6/30 REV FUEL/N	8,655.47	
						94740	MOVING EXPENSES	865.96	
						94789	HOUSING 6/23-7/4	2,803.22	
						94746	JULY 19 VAULT SVC	9,093.26	
						94830	INVENTORY	389.09	
						94780	RENEWAL 7/1-6/30/20	12,797.03	
						94797	JUNE19 WASTE FREEDOM	58.36	
						94798	JUNE 19 WASTE FREEDO	58.36	
						94799	JUNE 19 WASTE AIRPOR	58.36	
						94800	JUNE 19 WASTE BIG BA	58.36	
						94801	JUNE 19 WASTE LOMOND	58.36	
						94802	JUNE 19 WASTE GREEN	58.36	
						94803	JUNE 19 WASTE RESEAR	358.89	
						94804	JUNE 19 WASTE HIGHWA	175.08	
						94805	JUNE 19 WASTE KINGS	278.49	
						94806	JUNE 19 WASTE MT HER	21.72	
66003	07/22/19	E929	375.24	GUILD, WESLEY		94741	TRAVEL REIMBURSEMENT	375.24	
66004	07/22/19	001745	14,756.89	HARTFORD LIFE AND ACCIDENT INS		94582	JULY 19 AD & D	3,954.04	
						94583	JULY 19 LTD	10,453.93	

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66005	07/22/19	3,610.00	003220	INFILNSOURCE, INC		94793	JULY 19 AD & D	4,302.96	
66006	07/22/19	848.45	E1040	JIMENEZ, RICK		94794	CREDIT	-3,954.04	
66007	07/22/19	226.16	1117	KELLEY'S SERVICE INC.		94783	7/1-6/30/20 ESA	3,610.00	
66008	07/22/19	23,627.38	003366	KEY GOVERNMENT FINANCE INC		94743	TRAVEL REIMBURSEMENT	848.45	
66009	07/22/19	210.00	002990	KISMET	7	94833	INVENTORY	226.16	
66010	07/22/19	2,175.00	003195	LANDAVERRY, CARLOS G.		94784	JULY 19 PAYMENT	23,627.38	
66011	07/22/19	408.00	852	LAW OFFICES OF MARIE F. SANG	7	94775	CPR/ FIRST AD TRAINI	210.00	
66012	07/22/19	2,155.21	003273	MGP XI REIT LLC		94817	WRITTEN TRANSLATION	750.00	
66013	07/22/19	94.41	041	MISSION UNIFORM		94818	8/24/18-5/17/19 SVCS	1,350.00	
66014	07/22/19	1,300.00	E045	MONTESINO, EDUARDO		94826	BILINGUAL TEST ADMIN	75.00	
66015	07/22/19	21.85	003326	NIDAL HALABI & NADA ALGHARIB		94753	WC INS 5/20-7/2	408.00	
66016	07/22/19	8,072.63	009	PACIFIC GAS & ELECTRIC		94777	AUG19 RENT CPT MALL	2,155.21	
66017	07/22/19	1,881.17	043	PALACE ART & OFFICE SUPPLY		94762	UNIFORMS	23.91	
66018	07/22/19	35,916.50	002939	PREFERRED BENEFIT		94827	LAUNDRY	34.50	
66019	07/22/19	600.00	003392	PROTERA, INC.		94828	LAUNDRY	36.00	
66020	07/22/19	138.20	019	RAYNE OF SANTA CRUZ, INC.		94745	TRAVEL ADV 8/12-8/16	1,300.00	
66021	07/22/19	110.17	003024	RICOH USA, INC CA		94747	NAME PLATE R.FRANCIS	21.85	
66022	07/22/19	2,056.96	003409	RUSSELL S JONES		94749	5/30-6/27 1200 RIVER	4,801.18	
66023	07/22/19	1,384.38	001253	SANTA CRUZ COUNTY REGIONAL		94750	05/30-06/27 920 PACI	3,271.45	
66024	07/22/19	427.92	079	SANTA CRUZ MUNICIPAL UTILITIES		94819	OFFICE SUPPLIES	36.00	
66025	07/22/19	298.63	788	SCMTD PETTY CASH - FINANCE		94820	OFFICE SUPPLIES	595.18	
66026	07/22/19	314.60	002459	SCOTT'S VALLEY WATER DISTRICT		94821	OFFICE SUPPLIES	19.60	
66027	07/22/19	2,231.39	003434	SERVPRO OF SANTA CRUZ/SANTA CL		94822	OFFICE SUPPLIES	1,088.67	
66028	07/22/19	2,500.00	002267	SHAW / YODER / ANTWIH, INC.		94823	OFFICE SUPPLIES	14.75	
66029	07/22/19	1,304.35	003292	SLINGSHOT CONNECTIONS LLP		94824	OFFICE SUPPLIES	17.44	
66030	07/22/19	51.38	115	SNAP-ON INDUSTRIAL		94825	OFFICE SUPPLIES	109.53	
66031	07/22/19	15,604.25	001075	SOQUEL III ASSOCIATES	7	94744	JULY 19 DENTAL	35,916.50	
66032	07/22/19	470.00	003441	STRATEGIC ECONOMICS, INC.		94748	MOLD CLEAR 920 PACIF	600.00	
66033	07/22/19	12.26	001040	TERRYBERRY CO., LLC		94837	SALT FOR SOF	138.20	
66034	07/22/19	8,204.02	003285	THE AFTERMARKET PARTIS CO LLC		94785	7/1-7/31 1200 RIVER	110.17	
						94832	RPR GATE 1200A RIVER	2,056.96	
						94795	BUS ON SHOULDER	1,384.38	
						94834	6/1-6/30 110 VERNON	404.58	
						94835	6/1-6/30 1200 RIVER	23.34	
						94839	PETTY CASH	298.63	VOIDED
						94786	4/4-6/3 246 KINGS VI	230.82	
						94787	JUNE19 RECYCLE WATER	83.78	
						94781	MOLD REMED 920 PACIF	2,231.39	
						94759	JULY19 LEGISLATIVE	2,500.00	
						94791	W/E 7/7 TEMP	848.35	
						94792	W/E 7/7 TEMP	456.00	
						94752	SHOP TOOL	51.38	
						94776	AUG19 RENT RESEARCH	15,604.25	
						94754	PACIFIC REDEVELOPMEN	470.00	
						94836	POSTAGE	12.26	
						94807	VEH# 1204 RPR	226.83	

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66035	07/22/19					94808	INVENTORY	80.76
66036	07/22/19					94809	INVENTORY	349.13
66037	07/22/19					94810	INVENTORY	3,985.01
						94811	INVENTORY	360.98
						94812	INVENTORY	2,249.13
						94813	INVENTORY	877.81
						94814	INVENTORY	74.37
66035	07/22/19		156.53	UNITED PARCEL SERVICE		94751	FREIGHT	156.53
66036	07/22/19		245.54	VERIZON WIRELESS	0	94778	6/2-7/1 MOBILE SVC	245.54
66037	07/22/19		2,071.73	WILLIAMS SCOTSMAN, INC.		94831	6/22-7/21 EQUIP RENT	2,161.16
						94838	CREDIT	-89.43
66038	07/22/19		75.42	ZEE MEDICAL SERVICE CO.		94788	MED SUPPLIES WTC	75.42
66039	07/29/19		99.00	A TOOL SHED, INC.		94938	TRAILER RENTAL	99.00
66040	07/29/19		23.09	AA SAFE & SECURITY CO		94920	STORAGE CABINET KEY	23.09
66041	07/29/19		211.46	ABC BUS INC		94939	INVENTORY	211.46
66042	07/29/19		2,100.69	ACCOUNTEMPS A ROBERT HALF CO		94973	W/E 7/19 TEMP	1,208.62
						94974	W/E 7/19 TEMP	892.07
66043	07/29/19		962.50	ACTION TOWING & ROAD SVC CORP		94941	VEH# 4203 TOWING	962.50
66044	07/29/19		6,565.28	AT&T		94946	6/10-7/9 INTERNET	889.38
						94948	6/19-7/18 MAIN ACCT	5,526.56
						94951	6/19-7/18 OPS ELE FI	149.34
66045	07/29/19		9,075.69	B & H FOTO & ELECTRONICS CORP		94932	10 NETWORK SWITCHES	8,937.89
						94933	LAPTOP BATTERY	137.80
66046	07/29/19		372.95	CALIFORNIA DEPARTMENT OF TAX		94918	APR-JUN19 DIESEL TAX	372.95
66047	07/29/19		6,118.00	CATTO'S GRAPHICS, INC.		94961	SIGNS, INSTALL, LABO	5,025.50
						94962	TRUCK RENTAL-SINGS	1,092.50
66048	07/29/19		296.15	CHEVROLET OF WATSONVILLE LLC	7	94940	VEH# 1950 ALLOY WHEE	296.15
66049	07/29/19		900.00	CITY OF SANTA CRUZ/PARKING		94927	STAFF PARKING AUG 19	900.00
66050	07/29/19		1,566.15	CITY OF WATSONVILLE UTILITIES		94930	6/13-7/10 WTC	54.35
						94963	6/18-7/16 WATER WTC	93.22
						94964	6/17-7/16 WATER WTC	81.28
						94965	6/18-7/16 WATER WTC	401.00
66051	07/29/19		18,564.54	CLEAN ENERGY		94972	WASTE WTC	936.30
						94878	LNG 7/3	4,577.69
						94879	LNG 7/1	6,957.97
						94880	LNG 7/9	7,028.88
66052	07/29/19		308.00	COMMUNITY TELEVISION OF		94958	6/28 MEETING COVERAG	308.00
66053	07/29/19		120.00	COSTCO WHOLESALE MEMBERSHIP		94926	9/19-8/30/20 MEMBERS	120.00
66054	07/29/19		83.64	CREATIVE BUS SALES, INC.		94925	VEH# PC1714 RPR	83.64
66055	07/29/19		6,328.18	CUMMINS PACIFIC LLP		94911	INVENTORY	5,330.51
						94912	INVENTORY	1,270.80
						94913	CREDIT	-273.13
66056	07/29/19		2,001.04	EAST BAY TIRE CO.		94850	TIRES	269.38
						94851	TIRES	1,462.28
						94852	TIRES	269.38
66057	07/29/19		2,791.25	ENVIRONMENTAL LOGISTICS INC		94937	DISPOSAL 138 GOLF	2,791.25

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66058	07/29/19	1,135.60	EXPRESS SERVICES INC.		94955	W/E 7/14 TEMP	1,135.60
66059	07/29/19	45,680.64	FIRST ALARM SECURITY & PATROL		94916	JUNE 19 SECURITY-ALL	45,680.64
66060	07/29/19	1,539.19	FIS		94975	JUNE19 MERCHANT FEES	1,539.19
66061	07/29/19	2,522.62	FLYERS ENERGY LLC		94942	FORKLIFT PROPANE	56.77
					94943	7/1-7/15 FUEL	2,465.85
66062	07/29/19	57.26	FRONTIER COMMUNICATIONS - 3025		94956	209-025-0541-0613025	57.26
66063	07/29/19	57.26	FRONTIER COMMUNICATIONS - 6145		94959	209-091-6033-1126145	57.26
66064	07/29/19	74.79	GILLIG LLC		94967	INVENTORY	74.79
66065	07/29/19	333.47	GRAFFITI SHIELD INC		94919	INVENTORY	333.47
66066	07/29/19	1,171.62	GRAINGER		94840	VEH# 1950 PAIL	21.80
					94841	PAINT AND SUPPLIES	708.08
					94842	STOP AND KEEPER	5.49
					94843	TRAILER HITCH BALL	52.31
					94844	ALCHOL PADS , ANTISEP	11.41
					94845	INVENTORY	43.29
					94846	DIESEL CANS	328.48
					94847	INVENTORY	26.50
					94848	EYE LAG SCREW	48.32
					94849	INVENTORY	215.41
					94914	CREDIT	-289.47
66067	07/29/19	87,069.73	HANSON BRIDGETT LLP		94882	JUNE 19 RETAINER	24,000.00
					94883	M# 032117.006012	26,196.00
					94884	M# 032117.006013	34,498.80
					94885	M# 032117.006016	2,374.93
66068	07/29/19	5,075.00	HARTFORD FLOOD INSURANCE CO		94936	9/1-8/31/20 1200B RI	5,075.00
66069	07/29/19	110.33	HOSE SHOP, THE INC		94944	HANDLE VALVE	100.16
					94947	BRASS SPRAY BORRLE	10.17
66070	07/29/19	1,179.09	IO, RODNEY H		94891	VEH# PC1110 RPR	788.66
					94892	VEH# PC1122 WTER PUM	390.43
66071	07/29/19	886.63	KELLEY'S SERVICE INC.		94853	VEH# 103 PARTS	532.97
					94854	INVENTORY	5.33
					94855	CREDIT	-2.87
					94856	VEH# 103 PARTS	184.85
					94857	INVENTORY	2.87
					94858	INVENTORY	153.89
					94859	PARTS-SHOP USE	17.37
					94860	CREDIT	-10.97
					94861	SHOP SUPPLIES	3.19
66072	07/29/19	2,159.49	KIMBALL MIDWEST		94935	INVENTORY	2,159.49
66073	07/29/19	20,145.87	MANSFIELD OIL CO OF GAINSVILLE		94881	DIESEL FUEL 7/5	20,145.87
66074	07/29/19	557.70	MISSION UNIFORM		94893	UNIFORMS	194.35
					94894	UNIFORMS	194.35
					94895	UNIFORMS	34.50
					94896	UNIFORMS	34.50
					94897	UNIFORMS	50.00
					94898	UNIFORMS	50.00

Attachment A

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

DATE 08/05/19 12:19

DATE: 07/01/19 THRU 07/31/19

CHECK # START THRU 9999999

CHECK NUMBER	CHECK DATE	CHECK VENDOR	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
66075	07/29/19	109.98 002721		NEXTEL COMMUNICATIONS/SPRINT		94928	5/26-6/25 WIRELESS	109.98	
66076	07/29/19	90.90 002323		NORTHERN SAFETY CO., INC.		94960	SAFETY GLASSES	90.90	
66077	07/29/19	2,801.15 009		PACIFIC GAS & ELECTRIC		94949	6/5-7/4 246 KINGS	71.94	
						94952	6/5-7/4 DISTRICT	2,729.21	
66078	07/29/19	1,725.00 002947		PEDALERS EXPRESS	7	94921	JUNE 19 COURIER SVCS	1,725.00	
66079	07/29/19	340.00 481		PIED PIPER EXTERMINATORS, INC.		94899	JULY19 PEST SVC VERN	260.50	
						94900	JULY19 PEST CNTR WTC	79.50	
66080	07/29/19	522.11 107A		PROBUILD COMPANY LLC		94862	LUMBER WO 163723	190.07	
						94863	INVENTORY	8.23	
						94864	INVENTORY	27.12	
						94865	MAINTENANCE SUPPLIES	13.21	
						94866	MAINTENANCE SUPPLIES	5.10	
						94867	MAINTENANCE SUPPLIES	23.82	
						94868	MAINTENANCE SUPPLIES	19.85	
						94869	MAINTENANCE SUPPLIES	22.65	
						94870	MAINTENANCE SUPPLIES	195.37	
						94871	MAINTENANCE SUPPLIES	16.69	
						94917	BUSINESS CARDS	96.14	
66081	07/29/19	96.14 882		RANDY WEST	7	94929	QUARTER ENDING 6/30	3,731.35	
66082	07/29/19	3,798.15 003024		RICOH USA, INC CA		94950	7/12-8/11 1200 RIVER	66.80	
66083	07/29/19	108.57 536		RIVERSIDE LIGHTING & ELECTRIC		92560	CREDIT MEMO - AUG 18	-170.74	
						92561	TENANT REPAIRS	104.36	
						94968	ET1105C SVT	174.95	
66084	07/29/19	125.69 135		SANTA CRUZ AUTO PARTS, INC.		94888	INVENTORY	66.58	
						94889	GREASE SWEEP-NON INV	26.20	
						94890	INVENTORY	32.91	
66085	07/29/19	267.00 848		SANTA CRUZ ELECTRONICS, INC.		94934	OUTDOOR CABLE	267.00	
66086	07/29/19	518.25 079		SANTA CRUZ MUNICIPAL UTILITIES		94966	6/8-7/9 WATER SVT	518.25	
66087	07/29/19	280.00 001292		SANTA CRUZ RECORDS MNGMT INC		94922	SHREDDING	280.00	
66088	07/29/19	1,800.00 001277		SJB GLOBALNET, INC.		94924	2018-2020 IT SUPPORT	1,800.00	
66089	07/29/19	1,535.77 003292		SLINGSHOT CONNECTIONS LLP		94953	W/E 7/14 TEMP	741.00	
						94954	W/E 7/14 TEMP	794.77	
66090	07/29/19	9,528.73 003285		THE AFTERMARKET PARTS CO LLC		94872	AIR FILTERS-ALL ARTI	286.15	
						94873	VEH# 1210 PARTS	76.81	
						94874	VEH# 2316 PARTS	197.32	
						94875	VEH# 1202 PARTS	35.31	
						94876	INVENTORY	108.29	
						94877	INVENTORY	885.91	
						94901	INVENTORY	383.81	
						94902	INVENTORY	1,310.24	
						94903	INVENTORY	1,204.61	
						94904	INVENTORY	35.37	
						94905	INVENTORY	2.22	
						94906	INVENTORY	5,002.69	
66091	07/29/19	2,219.31 003231		THE HON COMPANY LLC		94945	FURNITURE	2,219.31	
66092	07/29/19	23,936.74 057		U.S. BANK		94931	*****-****-5056	23,936.74	

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

DATE 08/05/19 12:19

DATE: 07/01/19 THRU 07/31/19

CHECK # START THRU 9999999

CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
66093	07/29/19	6,885.00	ULTRABAC SOFTWARE		94923	7/30-7/30/22 RENEWAL	6,885.00	
66094	07/29/19	1,773.01	VALLEY POWER SYSTEMS, INC.		94907	INVENTORY	998.71	
					94908	CREDIT	-177.53	
					94909	INVENTORY	55.29	
					94910	INVENTORY	896.54	
66095	07/29/19	2,975.90	VISION COMMUNICATIONS		94886	RADIOS 4205,7,8,9	2,410.59	
66096	07/29/19	2,161.16	WILLIAMS SCOTSMAN, INC.		94887	RADIOS 1950, 1951	565.31	
66097	07/29/19	975.00	WILSON, GEORGE H., INC.		94957	20X8 TEMP CS STATIO	2,161.16	
					94969	ANNUAL BACKFLOW VERN	260.00	
					94970	ANNUAL BACKFLOW RIVE	455.00	
					94971	ANNUAL BACKFLOW GOLF	260.00	
66098M07/26/19		1,033.00	CALIFORNIA DEPARTMENT OF TAX		95028	APR-JUN 19 SALES TAX	1,033.00	MANUAL
TOTAL		2,214,296.31	ACCOUNTS PAYABLE			TOTAL CHECKS	296	2,214,296.31

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DATE: August 23, 2019
TO: Board of Directors
FROM: Alex Clifford, CEO/General Manager
SUBJECT: ACCEPT AND FILE THE MINUTES OF THE JUNE 28, 2019 REGULAR METRO BOARD OF DIRECTORS MEETING AND THE AUGUST 9, 2019 SPECIAL METRO BOARD OF DIRECTORS MEETING

I. RECOMMENDED ACTION

That the Board of Directors Accept and File the Minutes of the June 28, 2019 Board of Directors Regular Meeting and the August 9, 2019 Board of Directors Special Meeting

II. SUMMARY

- Staff is providing minutes from the Santa Cruz Metropolitan Transit District (METRO) June 28, 2019 Board of Directors Regular Meeting and the August 9, 2019 Board of Directors Special Meeting.
- Each meeting staff will provide minutes from the previous METRO Board and Committee meetings.

III. DISCUSSION/BACKGROUND

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

IV. FINANCIAL CONSIDERATIONS/IMPACT

None.

V. ALTERNATIVES CONSIDERED

None.

VI. ATTACHMENTS

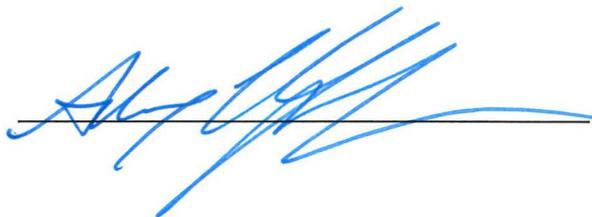
Attachment A: Draft minutes for the Regular Board of Directors Meeting of June 28, 2019

Attachment B: Draft minutes for the Special Board of Directors Meeting of August 9, 2019

Prepared by: Gina Pye, Executive Assistant

VII. APPROVALS

Alex Clifford, CEO/General Manager



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**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (METRO)
BOARD OF DIRECTORS AGENDA MEETING MINUTES*
JUNE 28, 2019 – 9:00 AM
WATSONVILLE CITY COUNCIL CHAMBERS
275 MAIN STREET, WATSONVILLE, CA**

A regular meeting of the Board of Directors of the Santa Cruz Metropolitan Transit District (METRO) was convened on Friday, June 28, 2019, at the Santa Cruz City Chambers, 809 Center Street, Santa Cruz, 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@scmted.com

SECTION I: OPEN SESSION

CALL TO ORDER at 9:01AM by Chair Bottorff.

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

Director Ed Bottorff	City of Capitola
Director Trina Coffman-Gomez	City of Watsonville
Director Aurelio Gonzalez	City of Watsonville
Director John Leopold	County of Santa Cruz
Director Donna Lind	City of Scotts Valley
Director Cynthia Mathews	City of Santa Cruz
Director Donna Meyers	City of Santa Cruz
Director Bruce McPherson	County of Santa Cruz
Director Larry Pageler	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 Stephen Preston	UCSC

Ex-Officio Director Northcutt and Director Lind were absent.

STAFF PRESENT:

Alex Clifford	METRO CEO/General Manager
Julie Sherman	METRO General Counsel

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

Heather Adamson, AMBAG	Bonnie Morr, SMART
Eddie Benson, SCMTD	Keith Otto, Self/County Resident
Antonio Castillo, SEIU	Freddy Rocha, SCMTD
Anna Marie Gouveia, SCMTD	Josh Shaw, SYA
Isaac Holly, METRO	Daniel Zaragoza, SCMTD

Attachment A

3 ANNOUNCEMENTS

- 3-1. Mindy Esqueda introduced her 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

Director Mathews shared that the Santa Cruz City Council voted to approve a contract amendment to complete the Final 5 Design on the Highway 9 interchange improvement at its last meeting. She also requested METRO provide support for the improvements at this intersection.

Director McPherson advised that the County is anticipating an update regarding the availability of federal funding for Santa Cruz County roads.

Director Gonzalez anticipates the Watsonville Transit Center mural will be complete by the end of the year.

There were no public comments.

5 ORAL AND WRITTEN COMMUNICATIONS TO THE BOARD OF DIRECTORS

- 5.1 May 10, 2019 Letter from Jimmy Panetta, Congressman
- 5.2 May 31, 2019 Letter from Rick Longinotti, Campaign for Sustainable Transportation

Mr. Keith Otto spoke of riders throughout the county and the connection between the SCCRTC and the METRO. (See the attached letter dated June 28 from Brett Garrett, which was received at the board meeting.)

Carl Sigman complimented the Bus Operators. He requested METRO adjust the 31 day pass policy, which currently expires at midnight, rather than 31 full days from the first use of the card; e.g., 7:59AM. Additionally, the downtown clock system needs to be adjusted to accurately reflect the time.

Mario Espinoza, Bus Operator for 30+ years, was present to advocate for his son, Corey, who was terminated 10 weeks after he was hired. He provided the attached documentation citing examples of the successes Corey had during the training period, highlighting the potential dangerous passenger situation he diffused, and asked that Corey be given a second opportunity.

James Sandoval provided the attached petition signed by Operators supporting a second chance for Corey, saying he had been unable to discover a reason for his termination. Given the problems METRO is currently facing with the recruiting and retaining of qualified Operators, he asked the Board to reconsider Mr. Espinoza's termination.

Chair Bottorff said they would look into the issue.

There was no public comment.

6 WRITTEN COMMUNICATIONS FROM MAC (if applicable)

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

7 LABOR ORGANIZATION COMMUNICATIONS

Olivia Martinez, SEIU representative, provided a brief history and status on the negotiations. She expressed concerns noting the union has worked in good faith with management to complete the class and compensation study, etc. The union is asking the Board to direct the

Attachment A

METRO team to return to the table and bargain in good faith. She highlighted the differences between the handling and outcome of the management compensation, CEO compensation and union expectations, which vary greatly. Nathan Meisenheimer spoke of the high cost of living in Santa Cruz and the distances many employees travel to provide for their families. Everyone is an important member of the METRO family and should be treated as such.

Wes Guild, Electronic Tech and VMU Chapter President, expressed concern about the working conditions and impact to the employees in terms of physical and emotional effects.

Joan Jeffries, representing SEA, spoke of the class and compensation study, which came at a cost of \$70K+, just for the SEIU portion. A number of positions were not adequately represented; the comparables do not accurately reflect certain classifications. Yet, we realize we have to move forward with the results of the study. COLA increases are important. Due to the current salary structure wherein a typical employee tops out after five years, a number of members will see no increase otherwise. She provided the attached table delineating COLAs from 2014 through today by year. As represented in the attached salary scales, the METRO increase from 2014 to today is 2%.

James Sandoval asked the Board to intervene in the negotiations, outlining the delays, numerous outstanding proposals intended to reach parity, etc., which represent regressive bargaining and bad faith. He reminded the assembly that they stood back while management received their increases. They are now requesting equal consideration when reviewing their comprehensive package. Recognizing the \$8M+ in reserves, they ask that the Board delay funding any OPEB shortages until the MOUs are ratified.

Nate Abrego, ParaCruz representative on the SMART Local 23 bargaining team, restated a number of the previous comments, emphasizing they want what is fair.

Brandon Freeman, SMART Local 23 Vice Chair, suggested CEO Clifford sit at the bargaining table. He said if the Board looked at today's schedules, they could verify that none of the Operators took OT today. He reminded the assembly that the union gave back 2% over the past couple of years and are now expecting to receive nothing in return.

Vickie Trent, METRO Operator for a number of years, would like to see this come to a close quickly. She thanked the Board in advance for being fair.

Bonnie Morr, Bus Operator since 1989, reminded the assembly that they have worked repeatedly to help METRO meet their obligations to the public. The Operators gave up their raises for four years. METRO is taking the medical benefit back to 2005 levels. We are asking the Board to direct the METRO team to move forward in a productive manner. We are your employees; give us the ability to get a decent contract, keep what we have and earn wages to make up for four years of nothing.

Erlyn Osorio, Eulalio Abrego, Ryan MacDonnell, Elmer Torres, and Karen Blight made similar comments as those summarized above.

Chair Bottorff said the Board heard everyone's comments and acknowledged the commenters' request(s) to be fairly compensated for what they do. The Board will discuss these issues in today's Closed Session.

8 ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS

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

Attachment A

CONSENT AGENDA

- 9-01 RECOMMENDED ACTION ON TORT CLAIMS
- 9-02 ACCEPT AND FILE: PRELIMINARY APPROVED CHECK JOURNAL DETAIL FOR THE MONTH OF MAY 2019
- 9-03 ACCEPT AND FILE: MINUTES OF THE APRIL 17, 2019 METRO ADVISORY COMMITTEE (MAC) MEETING, THE MAY 17, 2019 BOARD OF DIRECTORS MEETING AND THE JUNE 14, 2019 CAPITAL PROJECTS AND FINANCE, BUDGET AND AUDIT STANDING COMMITTEE MEETINGS
- 9-04 ACCEPT AND FILE: THE YEAR TO DATE MONTHLY FINANCIAL REPORTS AS OF APRIL 30, 2019
- 9-05 APPROVE: REVISED CALTIP JPA AGREEMENT AND BYLAWS
- 9-06 APPROVE: RENEWAL OF LIABILITY AND VEHICLE PHYSICAL DAMAGE INSURANCE PROGRAM COVERAGE WITH CALTIP FOR FY20
- 9-07 APPROVE: CONSIDERATION OF RESOLUTION APPROVING THE FY19 REVISED CAPITAL BUDGET
- 9-08 ACCEPT: SEMI-ANNUAL REPORT ON THE STATUS OF METRO'S DISADVANTAGED BUSINESS ENTERPRISE PROGRAM
- 9-09 APPROVE: CONSIDERATION OF AUTHORIZING THE CEO TO EXECUTE A ONE YEAR EXTENSION AMENDMENT (FOURTH AMENDMENT) TO THE CONTRACT FOR TRANSIT SERVICES WITH THE UNIVERSITY OF CALIFORNIA SANTA CRUZ (UCSC)
- 9-10 APPROVE CONSIDERATION OF AUTHORIZING THE CEO TO EXECUTE AN AMENDMENT (FIRST AMENDMENT) TO THE CONTRACT FOR TRANSIT SERVICES WITH CABRILLO COLLEGE
- 9-11 APPROVE: CONSIDERATION OF AWARD OF CONTRACT TO MASABI, LLC FOR ELECTRONIC FARE PAYMENT SYSTEM PILOT PROGRAM NOT TO EXCEED \$100,000
- 9-12 ACCEPT AND FILE: ANNUAL PROGRESS IN THE EVOLUTION OF THE FLEET TO ZERO EMISSIONS BUSES
- 9-13 APPROVAL OF THE 10-YEAR (FISCAL YEAR 2020-29) STRATEGIC BUSINESS PLAN
- 9-14 APPROVAL OF THE SCCRTC RAIL CORRIDOR ALTERNATIVE ANALYSIS STUDY SCOPE OF WORK
- 9-15 APPROVAL OF THE CITY OF SANTA CRUZ DOWNTOWN EMPLOYEE BUS PROGRAM
- 9-16 APPROVE: AUTHORIZE THE CEO TO EXECUTE A SOLE SOURCE CONTRACT WITH ECOLANE FOR DRT SOFTWARE SERVICES

Attachment A

- 9-17 APPROVE: CONSIDERATION OF AUTHORIZING THE CEO TO EXECUTE A 1ST AMENDMENT WITH COMPLETE COACH WORKS (CCW) AND INCREASE THE PROJECT VALUE BY \$299,888 FOR THE TRANSIT BUS REFURBISHMENT PROJECT
- 9-18 APPROVE: CONSIDERATION OF AUTHORIZING THE CEO TO ENTER INTO A SOLE SOURCE CONTRACT WITH THE CENTER FOR TRANSPORTATION AND THE ENVIRONMENT FOR ZERO EMISSION BUS TRANSITION PLANNING SERVICES
- 9-19 ACCEPT AND FILE: QUARTERLY PROCUREMENT REPORT FOR 1ST QUARTER OF FY20

Public comment:

Rick Longonetti spoke to agenda item 9-07 and the accompanying presentation.

Director Mathews requested METRO consider the entire community when filling the MAC vacancies.

Chair Bottorff pulled agenda item 9-14 and asked Guy Preston, SCCRTC Executive Director, to provide some clarification to the item. Mr. Preston informed the assembly that at its June 27, 2019 meeting, the Commission received direction to make improvements to the proposed RFP and return to the SCCRTC in August. Mr. Preston and Chair Bottorff requested METRO review the revised RFP and provide input to the SCCRTC. This item will return to the Board in August.

ACTION: MOTION TO CONTINUE AGENDA ITEM 9-14, APPROVAL OF THE SCCRTC RAIL CORRIDOR ALTERNATIVE ANALYSIS STUDY SCOPE OF WORK, TO THE AUGUST 23, 2019 METRO BOARD MEETING

MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR LEOPOLD

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

Director Mathews requested minor clarifications to the following minutes:

9-03A.2, ParaCruz OnTime Performance: Third paragraph, second sentence: Change "Lyft Line" to "LiftLine".

9-03C.2, Item 7, Receive and Recommend Approval of the 10-Year (Fiscal Year 2020-29 Strategic Business Plan), second paragraph: Replace second sentence to read: "She expressed skepticism about the success of another ballot measure."

9-03C.3, Item 9, Oral Pacific Station Update, third paragraph: Change the word "politicians" to read "elected representatives".

ACTION: MOTION TO ACCEPT THE CONSENT AGENDA AS PRESENTED WITH REQUESTED CORRECTIONS TO THE MINUTES

MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR LEOPOLD

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

Attachment A

REGULAR AGENDA

10 PRESENTATION OF EMPLOYEE LONGEVITY AWARDS FOR 20 YEARS: FRANCISCO CALDERON, PATRICIA CUMMINGS, ANDRE HARTE AND LYNN HERSEY

In the absence of those employees being recognized, Chair Bottorff read their names and titles, thanking them for their service.

11 RESOLUTION OF APPRECIATION, RETIREE: ERNEST BROWN & BILL YEO

In the absence of Messrs. Brown and Yeo, Chair Bottorff announced their names and number of service years.

ACTION: MOTION TO ACCEPT THE RESOLUTIONS AS PRESENTED

MOTION: DIRECTOR LEOPOLD

SECOND: DIRECTOR COFFMAN-GOMEZ

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

12 STATE LEGISLATIVE UPDATE FROM JOSH SHAW OF SHAW/YODER/ANTWIH, INC.

Josh Shaw, Shaw/Yoder/Antwih, spoke to the presentation noting that \$20M was added last night to a new cap and trade bill to assist transit agencies in the purchase of electric vehicles, representing a slight increase over past years.

Mr. Shaw will provide CEO Clifford with some suggested dates to host a METRO contingent in Sacramento to visit/meet with legislators and agencies.

Public comment:

Ms. Morr clarified SMART's position on SB336 (a bill regarding autonomous/driverless vehicles), stating their union has been opposing this bill.

13 FEDERAL LEGISLATIVE UPDATE FROM CHRIS GIGLIO OF CAPITAL EDGE

Chris Giglio, Capital Edge, provided commentary to the presentation, adding they are hopeful that the alternative fuel tax may be extended and made retroactive by Congress at the end of this year. He has been working with local elected representatives in DC to address the Federal Highway Administration (FHWA) reimbursements for the 2016-17 storm damage to County roads.

At Director Mathews' request, Mr. Giglio spoke briefly about the 2017 "Opportunity Zones" program, which would permit investors with capital gains exposure to take advantage of tax breaks if they invest in "opportunity zones". The state has designated three opportunity zones in Santa Cruz: one in downtown Santa Cruz and two in Live Oak. The program is still in its developmental stages, awaiting additional guidance from the IRS, but there is interest.

Public comment:

In response to public comment, Mr. Giglio provided a brief update on the proposed Green New Deal.

Attachment A

14 PUBLIC HEARING: FINAL ADOPTION OF SANTA CRUZ METRO'S FY20 AND FY21 OPERATING BUDGETS, FY20 CAPITAL BUDGET – TO COMMENCE AT 9:00AM OR AS SOON THEREAFTER AS POSSIBLE

Angela Aitken, CFO, opened the public hearing at 10:47AM and spoke to the presentation, focusing on changes made since the budget was last presented to the Board.

Public comment:

Mr. Sandoval asked the Board to delay approving the budget until there is agreement on the three outstanding Union Memorandums of Understanding.

Ms. Casby expressed her difficulties in following the financial presentation and displeasure with the manner in which public meetings are held.

Vice Chair Rotkin reminded the assembly that all information is available to the public and offered to meet with any member of the public to discuss the information. He added that it is possible to make amendments to the budget if required in the future.

Director Coffman-Gomez noted the budget has been reviewed and discussed in detail at the Committee and Board levels. She also expressed her appreciation to staff for their efforts.

Ms. Trent noted that the District's enabling statute uses the term "General Manager" throughout. She recommended Mr. Clifford be referred to as the "General Manager", rather than the CEO.

The public hearing was closed at 11:05AM

ACTION: MOTION TO ACCEPT THE RESOLUTION AS PRESENTED

MOTION: DIRECTOR ROTKIN

SECOND: DIRECTOR MATHEWS

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

15 CEO ORAL REPORT

Alex Clifford, CEO/General Manager, spoke on a variety of issues.

He welcomed new Safety, Security and Risk Management Director, Rufus Francis, and provided a brief bio. Mr. Francis thanked the Board and the organization for the opportunity.

New Hires:

- 6/10 Jess Martinez, Fleet Maintenance Supervisor
- 6/10 Virginia Vaquero Casey, Administrative Assistant
- 6/24 Rufus Francis, Safety, Security and Risk Management Director

Promotions:

- Miguel Villarruel, promoted from Mechanic I to Mechanic II
- Christopher Perez, promoted from Mechanic I to Mechanic II

At the request of Director Mathews, CEO Clifford provided a brief Pacific Station update. CEO Clifford and staff met a couple of times with City of Santa Cruz representatives and discussed

Attachment A

a path forward, while continuing to review bus tarmac concept and design. Within the next couple of months, we plan to move towards grant applications. The City has mentioned opportunities for multi-year funding. Director Mathews said she and Director Meyers talked with Bonnie Lipscomb, Santa Cruz City Director of Economic Development, who is submitting a grant application today to the Department of Toxic Control to do some further characterization of the Pacific Station site that may open some additional grant opportunities. She suggested the NIAC building (purchased by the City a few years ago) as an interim site option for METRO offices. She and Ex-Officio Director Preston requested regular updates.

Director Coffman-Gomez inquired as to the status of the Flixbus commercial bus services and their use of Pacific Station space. COO Aguirre responded there has not been much movement from Flixbus.

There was no public comment.

16 ORAL METRO ADVISORY COMMITTEE (MAC) SEMI-ANNUAL REPORT

Veronica Elsea, MAC Chair, spoke on a variety of issues and thanked METRO staff for their contributions to the MAC. The Committee looks forward to working with METRO. Meeting quarterly is challenging as things may come up between their scheduled meeting(s); e.g., closing and removing of bus stops. She reminded everyone that the Committee can be an asset with public outreach to minimize surprises.

She thanked outgoing MAC members, Kevin Andrews and Cassity Mega, for their terms on the Committee and noted that recruitment for the two openings will be ending in the near future.

There was no public comment.

17 INTRODUCTION OF LEADERSHIP SANTA CRUZ COUNTY GRADUATES: DAWN CRUMMIÉ, GINA PYE AND FREDDY ROCHA

CEO Clifford introduced the graduates of Class 34 and said a few words about the program.

Dawn Crummie spoke of the insights the program provided her as a resident of Santa Clara County.

Freddy Rocha said one of the benefits of meeting the program participants is the contacts he now has with other agencies and businesses in the County.

Gina Pye thanked the assembly for the opportunity and highlighted some of her experiences within the program.

16 REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION

Julie Sherman, General Counsel, announced the Board will not be taking any reportable action today as none of the three labor agreements had been agreed upon.

Mr. Sandoval thanked the Board for listening to their concerns.

17 ANNOUNCEMENT OF NEXT MEETING: FRIDAY, AUGUST 23, 2019 AT 9:00 AM, AT METRO ADMIN OFFICES, 110 VERNON STREET, SANTA CRUZ, CA

Ed Botorff, Board Chair

RECESS TO CLOSED SESSION AT 11:37A

Attachment A

Board of Directors Agenda
June 28, 2019
Page 9 of 9

RECONVENE TO OPEN SESSION AT 1:26P

Chair Bottorff adjourned the meeting at 1:27P

DRAFT

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Attachment A

June 28, 2019

Dear Santa Cruz METRO Board Members and Staff,

Personal Rapid Transit (PRT) offers many advantages, including safety, low operating costs, high efficiency, on-demand service, and an unsurpassed level of convenience that will help to persuade more people to ride transit instead of driving.

Regarding the RTC/Metro's scope of work Alternatives Analysis for High Capacity Public Transit on the Rail Right-of-Way, I suggest the following changes to ensure full consideration of Automated Transit Networks (ATN) including Personal Rapid Transit:

The phrase **high capacity public transit** must be defined, in terms of the number of *passengers per hour*, per direction. A large number of small vehicles can provide better carrying capacity than a small number of large vehicles. A primitive PRT system taking six passengers every 15 seconds would serve 1,440 passengers per hour, while a conventional rail system on the branch line would likely serve at most 400 passengers per train or 800 passengers per hour (per direction).

Task 2.1 could include reviewing *citizen-provided studies* such as PRT Consulting's UCS Conceptual ATN Evaluation which demonstrated significant evidence that an elevated ATN system would provide superior results for all of the criteria established in the Unified Corridors Study. <http://tinyurl.com/prt-ucs-382> or <http://www.prtconsulting.com/docs/20181102-UCS-Conceptual-ATN-Evaluation-Final.pdf>

Transit travel time in **Task 3.1** should explicitly account for *time spent waiting* for a transit vehicle, including transfers.

The modes to be studied in **Task 6.1** should explicitly include *elevated Automated Transit Networks*. Please consider citing specific vendors such as Modutram, skyTran, and CyberTran.

I highly recommend choosing a consultant who has significant working knowledge of emerging technologies such as PRT/ATN. The scope of work could encourage partnership with PRT/ATN experts.

Sincerely,



Brett Garrett
190 Walnut Ave #307
Santa Cruz, CA 95060

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Attachment A

James Sandoval

From: Santa Cruz METRO <noreply@scmttd.com>
Sent: Tuesday, May 21, 2019 7:30 AM
To: James Sandoval
Subject: [CSV-0000001594] 5/21 incident

Hello,

A new ticket has been added:

[CSV-0000001594](#)

my831life@gmail.com wrote:

My morning driver for the 5:45 AM outbound trip of the Hwy 17 Express was re-training a driver behind the wheel (very descriptive, professional, and thorough), when we reached the bus stop in downtown San Jose, at Santa Clara St and Almaden Blvd. The trainee driver pulled into the stop for a woman who tried to flag him down. Upon opening the doors, the women seemed disoriented, as if she were under the influence of drugs of some sorts. She told both drivers she was going to Target, in east San Jose, in which I personally advised her to board VTA Line 22. The regular driver quickly noticed she had a knife on her, and told her that not weapons were allowed onboard the bus whatsoever, and made repeated attempts to make her deboard the bus for safety reasons. When she realized that the bus fare was \$7.00, she easily became disgruntled and refused to board the bus, due to "high fare." At one point, she mentioned something about being pregnant, and about using her knife to cut open her own stomach to prove whether or not she was pregnant. I advised the driver I was going to call San Jose Police, but he told me he was going to try and attempt to get her off the bus, which thankful, both drivers did. Both drivers did a tremen job, assuring the safety of themselves, but also for us passengers as well.

Your Phone - Include Area Code: [REDACTED]

Preferred method of contacting you: Email address entered above

Your Address: [REDACTED]

Your City: Marina

Your State: CA

Your Zip: 93933

Nature of Comment: Compliment

Date of Incident: 05.21.2019

Time of Incident: 7:00 AM

Route: 17 - Amtrak Highway 17 Express

Choose location : At Bus Stop (enter Stop ID below)

Attachment A

Location - additional information:

Vehicle Number - If Known: 2805

Direction of Travel: Outbound

Employee Name or Number - If Known:

Employee Position: Bus Operator

If Other, Please Describe:

DRAFT

James,

Attachment A

My son gave the original copy
to Dispatch last night. "John Newk"

WATSONVILLE COMMUNITY HOSPITAL

EMERGENCY ROOM

Esphoza Corey (May)
(May not) return to work

On/Until Please cover from work

Comments 5/29/19

[Signature] M.D.

152-7230-21 4/01

Attachment A

Santa Cruz Metropolitan
Transit District
Board of Directors

June 26, 2019

Dear Directors,

On May 20th of this year I received a phone call from S-61 Michael Rios, assistant to S-56 Leo Peña. Leo is the Safety and Training Coordinator. Michael told me I would be spending the day that following Thursday with Corey Espinosa in Line Instruction. Line Instruction is the final step in training to be a Bus Operator where the Trainee drives in service with a senior Driver along. The senior Driver is along to give advice, answer questions, and evaluate his performance. The block of work we did that day was University routes in an articulated bus 2318. Mr. Espinosa was profesional, drove safely, and was cordial and friendly and engaging with the passengers. I was pleased with his performance and felt his addition to our team would be a positive one. I was sorry to hear of his dismissal.

Sincerely,

A handwritten signature in black ink that reads "Ed Davidson". The signature is written in a cursive style with a large, stylized "E" and "D".

Ed Davidson, Bus Operator 512

Attachment A

Route Depart

MONDAY - FRIDAY

Santa Cruz Metro
Transit District

Block 0401

My name is Uriel Mendoza
I have been a metro bus driver
for 19 years
and I'm also a line instructor

MR. Corey Espinoza

was driving my Routes on this day
and he did a great job
he had an excellent performance on
the square turns

during the training MR. Espinoza
mentioned that his ribs was
hurting and he was going to
see a doctor

Uriel Mendoza

Attachment A

COMMENT/SUGGESTION SHEET

NAME Jose Luis Barriga MAILBOX # 87 DATE 6-22-19

BLOCK # _____ RTE # _____ BUS # _____ DIRECTION IB / OB TIME _____

STREET _____ CROSS STREET/ADDRESS _____

ADDITIONAL LOCATION INFORMATION IF NEEDED: _____

TYPE OF COMMENT:

SAFETY ACCESSIBILITY STOP/BENCH/SHELTER
 VEHICLE MAINT. ROUTE & SERVICE PASSENGER PROBLEMS
 SERVICE REVIEW FARES/PASSES OTHER Bus operator.

COMMENT/SUGGESTION:

my name is Jose Luis Barriga, I am writing this letter in regards of Corey Espinoza with the intent to let you guys know that Corey was a really great operator. I had the privilege to be his line instructor and observe his qualities as a driver. He was receptive to instruction. Followed instruction well, Had excellent customer service. He performed really well as a bus operator. Followed rules and policies.

FORWARD COMPLETED FORM TO DISPATCH SUPERVISOR

+++++

FOR OFFICE USE ONLY

DATE: _____

TO: _____

FROM: _____, OPERATIONS DEPARTMENT

If Applicable, FACILITIES TICKET #: _____

RESPONSE: _____

Attachment A

LINE INSTRUCTORS

JULIO GARCIA
MIKE MILLER
JOSE BARICA
ED DAVIDSON
URIEL MENDOZA
JOHNNY LOPEZ

DRAFT

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Attachment A

We, the undersigned below, respectfully request that the Metro and it's Board members reconsider its position on the training employee **Cory Espinoza** , and let him have a second chance. Having Commendations from customers come through straight out of training is remarkable and through the few instances we have gotten to work with him it has been nothing but positive. Please take some time to reconsider the facts and hopefully give Mr. Espinoza (Cory) a deserving second chance. Thank you for your time. 06/05/2019

66. Handwritten	105. Amber Genovay
67. Handwritten	106. MARIA MARTINEZ
68. RO M - Handwritten	107. DJ Horro
69. OSCAR HERRERA	108. Grace Cumberland
70. Patrick Fortner	109. Kristina Varcora
71. JOSE ORNELAS	110. Bailey Jeffs
72. Brandon Dellis	111. Handwritten
73. Handwritten	112. Handwritten
74. Handwritten	113. Handwritten
75. Handwritten	114. Handwritten
76. TOMEO UDAL	115. Juan Pons Garcia
77. Handwritten	116. JESSICA Ali
78. Handwritten	117. Handwritten
79. Handwritten	118. Handwritten
80. Handwritten	119. Justin Case Conder
81. Handwritten	120. Bella Rose
82. Handwritten	121. Handwritten
83. Handwritten	122. Juan Flores
84. Handwritten	123. Lolo Cruz
85. Handwritten	124. Berry Rodriguez
86. Handwritten	125. Handwritten
87. Handwritten	126. Handwritten
88. Handwritten	127. Handwritten
89. Handwritten	128. Handwritten
90. Handwritten	129. Handwritten
91. ANDY HILL	130. Handwritten
92. Handwritten	131. Handwritten
93. Handwritten	132. Handwritten
94. Handwritten	133. Handwritten
95. Handwritten	134. Handwritten
96. Handwritten	135. Handwritten
97. Handwritten	136. Handwritten
98. Handwritten	137. Handwritten
99. Jennifer Cutas	138. Handwritten
100. Handwritten	139. Handwritten
101. Handwritten	140. Handwritten
102. Handwritten	141. Handwritten
103. Handwritten	142. Handwritten
104. Handwritten	143. Handwritten

Attachment A

We, the undersigned below, respectfully request that the Metro and it's Board members reconsider its position on the training employee Cory Espinoza , and let him have a second chance. Having Commendations from customers come through straight out of training is remarkable and through the few instances we have gotten to work with him it has been nothing but positive. Please take some time to reconsider the facts and hopefully give Mr. Espinoza (Cory) a deserving second chance. Thank you for your time. 06/05/2019

- | | |
|----------------------|--------------------------|
| 1. [Signature] | 34. [Signature] |
| 2. Johnny Lopez 1005 | 35. [Signature] |
| 3. Fernando Calderon | 36. [Signature] |
| 4. [Signature] 993 | 37. [Signature] |
| 5. [Signature] | 38. [Signature] |
| 6. David Rojas | 39. [Signature] |
| 7. [Signature] | 40. Eduardo A Villalobos |
| 8. [Signature] | 41. [Signature] |
| 9. [Signature] | 42. NORMA FLORES |
| 10. HPR | 43. Jose [Signature] |
| 11. [Signature] | 44. [Signature] |
| 12. [Signature] | 45. [Signature] |
| 13. [Signature] | 46. [Signature] 652 |
| 14. [Signature] | 47. Tomas Mojica |
| 15. [Signature] | 48. [Signature] |
| 16. Manuel Alcala | 49. Robert [Signature] |
| 17. Michael Cochran | 50. [Signature] |
| 18. [Signature] | 51. [Signature] |
| 19. [Signature] | 52. [Signature] |
| 20. [Signature] | 53. [Signature] |
| 21. [Signature] | 54. [Signature] |
| 22. [Signature] | 55. Dennis Balle |
| 23. HUNG LEE | 56. [Signature] |
| 24. [Signature] | 57. David W. Horvath |
| 25. [Signature] | 58. [Signature] |
| 26. [Signature] | 59. [Signature] |
| 27. [Signature] 308 | 60. [Signature] |
| 28. [Signature] | 61. John Ochoa |
| 29. [Signature] | 62. [Signature] |
| 30. [Signature] | 63. [Signature] |
| 31. [Signature] 600 | 64. [Signature] |
| 32. [Signature] 886 | 65. [Signature] |
- the PR 488

Attachment A

Table A. San Francisco-Oakland-Hayward, CA, CPI-U 2-month and 12-month percent changes, all items index, not seasonally adjusted

Month	2015		2016		2017		2018		2019	
	2-month	12-month								
February	1.0	2.5	0.9	3.0	0.8	3.4	1.4	3.6	0.5	3.5
April	1.1	2.4	0.7	2.7	1.1	3.8	0.8	3.2	1.2	4.0
June	0.6	2.3	0.6	2.7	0.3	3.5	0.9	3.9		
August	0.3	2.6	0.7	3.1	0.2	3.0	0.6	4.3		
October	0.4	2.6	0.9	3.6	0.6	2.7	0.7	4.4		
December	-0.3	3.2	-0.3	3.5	-0.1	2.9	0.1	4.5		

16.1% increase from 2014 to today

DRAFT

RECEIVED AT 6/28/19 METRO BOARD MEETING

9-03A.23

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SEA SALARY SCHEDULE

Effective June 19, 2014

Class Title	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
ACCESS SERVICES COORD	21.78	22.88	24.02	25.18	26.50	27.80
ACCOUNTANT I	26.38	27.68	29.10	30.55	32.11	33.73
ACCOUNTANT II	27.68	29.10	30.55	32.11	33.70	35.37
ACCOUNTING CLERK	17.26	18.17	19.06	20.01	21.04	22.09
ACCOUNTING SPECIALIST	23.82	25.02	26.24	27.57	28.96	30.39
ACCOUNTING TECH	19.75	20.74	21.76	22.87	24.00	25.18
ADMIN ASSISTANT	22.58	23.73	24.90	26.15	27.46	28.84
ADMIN ASSISTANT/SUP	23.72	24.89	26.14	27.45	28.83	30.26
ADMIN CLERK I	17.50	18.38	19.29	20.26	21.28	22.34
ADMIN SERVICES COORD	30.17	31.68	33.26	34.92	36.68	38.52
ADMIN SPECIALIST	23.72	24.87	26.14	27.46	28.79	30.24
BENEFITS ADMINISTRATOR	23.98	25.17	26.42	27.77	29.15	30.63
CLAIMS INVESTIGATOR I	23.76	24.91	26.19	27.48	28.91	30.35
CLAIMS INVESTIGATOR II	26.38	27.69	29.08	30.55	32.12	33.73
CUSTODIAL SVC WKR I	16.64	17.44	18.28	19.19	20.13	21.14
CUSTODIAL SVS WKR II	18.12	19.04	19.99	20.97	21.98	23.08
CUSTOMER SVC COORD	22.07	23.19	24.34	25.49	26.81	28.12
CUSTOMER SVC REP	18.18	19.08	20.04	21.01	22.06	23.18
FAC MAINTENANCE SUP	30.52	32.04	33.64	35.30	37.06	38.89
FAC MAINTENANCE WKR I	18.64	19.58	20.51	21.51	22.57	23.69
FAC MAINTENANCE WKR II	21.78	22.87	24.00	25.17	26.41	27.72
FINANCIAL ANALYST	29.12	30.60	32.13	33.73	35.40	37.17
GRANTS/LEGIS ANALYST	31.41	33.01	34.65	36.35	38.19	40.11
HR CLERK	21.34	22.46	23.56	24.78	25.98	27.29
HR SPECIALIST	22.88	24.02	25.18	26.50	27.80	29.21
IT TECHNICIAN	22.52	23.63	24.82	26.06	27.40	28.73
JR TRANS PLANNER	23.40	24.56	25.82	27.09	28.46	29.87
LEAD CUSTODIAN	20.47	21.51	22.57	23.72	24.87	26.12
LEGAL SECRETARY	21.34	22.46	23.56	24.78	25.98	27.29
PARALEGAL	26.38	27.69	29.08	30.55	32.12	33.73
PARATRAN ELIG COORD	26.38	27.69	29.08	30.55	32.12	33.73
PAYROLL ACCT SP SPEC	22.46	23.56	24.78	26.00	27.29	28.65
PAYROLL SPECIALIST	21.34	22.46	23.56	24.78	25.98	27.29
PERSONNEL TECHNICIAN	24.72	25.95	27.21	28.32	30.04	31.56
PURCHASING AGENT	30.35	31.83	33.46	35.13	36.90	38.77
PURCHASING ASSISTANT	22.46	23.56	24.78	26.00	27.29	28.65
REVENUE SPECIALIST	18.18	19.08	20.04	21.01	22.06	23.18
SCHEDULE ANALYST	29.13	30.58	32.14	33.73	35.40	37.16
SR ACCOUNTING TECH	22.46	23.56	24.78	26.00	27.29	28.65

SR CUSTOMER SVC REP	21.01	22.07	23.17	24.32	25.51	26.82
SR FAC MAINT WKR	23.76	24.91	26.14	27.42	28.74	30.18
SR FINANCIAL ANALYST	32.32	33.96	35.66	37.44	39.30	41.26
SR IT TECHNICIAN	26.06	27.40	28.72	30.16	31.70	33.27
SR SYS ADMINISTRATOR	37.64	39.50	41.49	43.59	45.76	48.06
SR TRANS PLANNER	31.27	32.84	34.49	36.20	38.02	39.92
SUP OF REVENUE COLL	27.73	29.16	30.64	32.16	33.75	35.43
SYS ADMINISTRATOR	32.53	34.13	35.86	37.64	39.50	41.49
T&P PROG SPECIALIST	19.64	20.64	21.66	22.77	23.89	25.08
TRANSIT SURVEYOR	16.67	17.56	18.42	19.31	20.31	21.32
TRANSPORT PLAN AIDE	22.29	23.40	24.56	25.82	27.09	28.46
TRANSPORT PLANNER	29.78	31.27	32.84	34.49	36.20	38.02
VEHICLE SVC DETAILER	19.27	20.21	21.20	22.24	23.33	24.47
VEHICLE SVC TECHNICIAN	21.20	22.24	23.33	24.47	25.64	26.94
VEHICLE SVC WKR I	16.66	17.47	18.31	19.21	20.18	21.18
VEHICLE SVC WKR II	18.34	19.27	20.21	21.20	22.24	23.33

PSA SALARY SCHEDULE

Effective June 19, 2014

Class Title	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
FLEET MAINTENANCE SUP	30.52	32.04	33.64	35.30	37.06	38.89
SAFETY/TRAINING COORD	31.18	32.73	34.36	36.07	37.88	39.77
SERVICE PLANNING SUP	32.84	34.51	36.26	38.09	39.98	41.99
SUP OF PARTS & MAT - FM	28.10	29.54	30.99	32.52	34.09	35.78
SUPERVISING ACCT	32.72	34.34	36.05	37.86	39.74	41.73
TRANS PLANNING SUP	32.84	34.49	36.20	38.02	39.92	41.92
TRANSIT SUPERVISOR	28.04	29.44	30.90	32.45	34.09	35.78

VMU SALARY SCHEDULE

Effective June 19, 2014

Class Title	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
BODY REPAIR MECHANIC	24.79	26.03	27.33	28.70	30.14	31.65
FM LEAD MECHANIC	27.35	28.72	30.16	31.67	33.25	34.91
FM MECHANIC I	23.63	24.81	26.05	27.35	28.72	30.16
FM MECHANIC II	24.81	26.05	27.35	28.72	30.16	31.67
FM MECHANIC III	26.05	27.35	28.72	30.16	31.67	33.25
LEAD PARTS CLERK - FM	24.55	25.78	27.07	28.42	29.84	31.33
PARTS CLERK	19.75	20.74	21.78	22.87	24.01	25.21
RECEIVING PARTS CLERK	19.75	20.74	21.78	22.87	24.01	25.21
UPHOLSTERER I	21.30	22.37	23.49	24.66	25.89	27.18
UPHOLSTERER II	22.37	23.49	24.66	25.89	27.18	28.54

Effective June 14, 2018

	Step 1	Step 1 LL	Step 2	Step 2 L	Step 2 LL	Step 3	Step 3 L	Step 3 LL	Step 4	Step 4 L	Step 4 LL	Step 5	Step 5 L	Step 5 LL	Step 6	Step 6 L	Step 6 LL
SEA SALARY SCHEDULE																	
ACCESS SERVICES COORDINATOR	22.22	23.33	24.44	23.34	24.51	25.68	24.50	25.73	26.96	25.68	26.96	27.03	28.24	29.73	28.36	29.78	31.20
ACCOUNTANT I	29.05	30.50	31.95	30.50	32.03	33.56	32.03	33.63	35.23	33.63	35.31	37.08	36.99	38.85	37.08	38.93	40.78
ACCOUNTANT II	30.50	32.03	33.56	32.03	33.62	35.22	33.62	35.30	36.98	35.30	37.07	38.84	38.84	40.76	38.91	40.86	42.81
ACCOUNTING CLERK	19.09	20.04	20.99	20.05	21.05	22.10	21.05	22.10	23.15	22.10	23.15	24.32	24.32	25.53	24.37	25.59	26.81
ACCOUNTING SPECIALIST	27.91	29.31	30.71	29.30	30.77	32.24	30.77	32.31	33.85	32.31	33.93	35.63	35.55	37.33	35.62	37.40	39.18
ACCOUNTING TECH	21.71	22.80	23.89	23.93	25.07	26.22	23.93	25.13	26.38	25.12	26.38	27.64	27.64	29.02	27.69	29.07	30.45
ADMIN ASSISTANT	23.03	24.18	25.33	24.20	25.41	26.62	25.40	26.67	27.94	26.67	28.00	29.33	29.33	30.81	29.42	30.89	32.36
ADMIN ASSISTANT/SUPERVISOR	24.19	25.40	26.61	25.39	26.66	27.93	26.66	27.99	29.32	28.00	29.40	30.88	30.88	32.35	30.87	32.41	33.95
ADMIN CLERK I	17.85	18.74	19.63	18.75	19.69	20.63	19.68	20.66	21.64	20.67	21.70	22.73	22.73	23.89	22.79	23.93	25.07
ADMIN SPECIALIST	24.19	25.40	26.61	25.37	26.64	27.91	26.66	27.99	29.32	28.01	29.41	30.81	30.81	32.31	30.84	32.38	33.92
BENEFITS ADMINISTRATOR	24.46	25.68	26.90	25.67	26.95	28.23	26.95	28.30	29.65	28.33	29.75	31.17	31.17	32.71	31.24	32.80	34.36
CLAIMS INVESTIGATOR I	24.24	25.45	26.66	25.41	26.68	27.95	26.71	28.05	29.39	28.03	29.43	30.83	30.83	32.43	30.96	32.51	34.06
CLAIMS INVESTIGATOR II	26.91	28.26	29.61	28.24	29.65	31.06	29.66	31.14	32.62	31.16	32.72	34.28	34.28	36.04	34.40	36.12	37.84
CUSTODIAL SERVICE WORKER I	16.97	17.82	18.67	17.79	18.68	19.57	18.65	19.58	20.51	19.57	20.55	21.53	21.53	22.59	21.56	22.64	23.72
CUSTODIAL SERVICE WORKER II	18.48	19.40	20.32	19.42	20.39	21.36	20.39	21.41	22.43	21.39	22.46	23.54	23.54	24.66	23.54	24.72	25.90
CUSTOMER SERVICE COORDINATOR	22.51	23.64	24.77	23.65	24.83	26.01	24.83	26.07	27.31	26.00	27.30	28.60	28.60	30.09	28.68	30.11	31.54
CUSTOMER SERVICE REP	18.75	19.69	20.63	19.67	20.65	21.63	20.64	21.67	22.70	21.63	22.71	23.79	23.79	24.99	23.85	25.04	26.23
FAC MAINT SUPERVISOR	31.13	32.69	34.25	32.68	34.31	35.94	34.31	36.03	37.75	36.01	37.81	39.61	39.61	41.58	39.67	41.65	43.63
FAC MAINT WKR I	19.01	19.96	20.91	19.97	20.97	21.97	20.92	21.97	23.02	21.94	23.04	24.14	24.14	25.32	24.16	25.37	26.58
FAC MAINT WKR II	22.22	23.33	24.44	23.33	24.50	25.67	24.48	25.70	26.92	25.67	26.95	28.23	28.23	29.64	28.27	29.68	31.09
FINANCIAL ANALYST	34.35	36.07	37.79	36.07	37.87	39.67	37.87	39.76	41.65	39.77	41.76	43.75	43.75	45.94	43.85	46.04	48.23
GRANTS/LEGISLATIVE ANALYST	32.04	33.64	35.24	33.67	35.35	37.03	35.34	37.11	38.88	37.08	38.93	40.78	40.78	42.85	40.91	42.96	45.01
HR CLERK	21.77	22.86	23.95	22.91	24.06	25.21	24.03	25.23	26.43	25.28	26.54	27.80	27.80	29.16	27.84	29.23	30.62
HR GENERALIST	27.80	29.19	30.58	29.14	30.60	32.06	30.64	32.17	33.70	32.17	33.78	35.39	35.39	37.18	35.50	37.28	39.06
HR SPECIALIST	23.34	24.51	25.68	24.50	25.73	26.96	25.68	26.96	28.24	27.03	28.38	29.73	29.73	31.20	29.79	31.28	32.77
IT TECH	22.97	24.12	25.27	24.10	25.31	26.52	25.32	26.59	27.86	26.58	27.91	29.24	29.24	30.75	29.30	30.77	32.24
JR. TRANS PLANNER	23.87	25.06	26.25	25.05	26.30	27.55	26.34	27.66	28.98	27.63	29.01	30.39	30.39	31.93	30.47	31.99	33.51
LEAD CUSTODIAN	20.88	21.92	22.96	21.94	23.04	24.14	23.02	24.17	25.32	24.19	25.40	26.61	26.61	27.91	26.64	27.97	29.30
LEGAL SECRETARY	21.77	22.86	23.95	22.91	24.06	25.21	24.03	25.23	26.43	25.28	26.54	27.80	27.80	29.16	27.84	29.23	30.62
PARALEGAL	26.91	28.26	29.61	28.24	29.65	31.06	29.66	31.14	32.62	31.16	32.72	34.28	34.28	36.04	34.40	36.12	37.84
PARATRANSIT ELIGIBILITY COORDINATOR	26.91	28.26	29.61	28.24	29.65	31.06	29.66	31.14	32.62	31.16	32.72	34.28	34.28	36.04	34.40	36.12	37.84
PAYROLL SPECIALIST	24.04	25.24	26.44	25.25	26.51	27.77	26.51	27.84	29.17	27.84	29.23	30.62	30.62	32.14	30.68	32.21	33.74
PERSONNEL TECHNICIAN	25.21	26.47	27.73	26.47	27.79	29.11	27.75	29.14	30.53	29.18	30.64	32.10	32.10	33.70	32.19	33.80	35.41
PLANNING ANALYST	30.37	31.89	33.41	31.89	33.48	35.07	33.48	35.15	36.82	35.15	36.91	38.67	38.67	40.60	38.75	40.69	42.63
PURCHASING AGENT	30.96	32.51	34.06	32.47	34.09	35.71	34.13	35.84	37.55	35.83	37.62	39.41	39.41	41.40	39.55	41.53	43.51
PURCHASING ASSISTANT	22.91	24.06	25.21	24.03	25.23	26.43	25.28	26.54	27.80	26.52	27.85	29.18	29.18	30.62	29.22	30.68	32.14
REVENUE SPECIALIST	18.54	19.47	20.40	19.46	20.43	21.46	20.44	21.46	22.48	21.43	22.50	23.57	23.57	24.76	23.64	24.82	26.00
SAFETY SPECIALIST	33.18	34.84	36.50	34.81	36.55	38.29	36.58	38.41	40.24	38.39	40.31	42.23	42.23	44.31	42.32	44.44	46.56
SCHEDULE ANALYST	29.71	31.20	32.69	31.19	32.75	34.31	32.78	34.42	36.06	34.40	36.12	37.84	37.84	39.73	37.90	39.80	41.70

L = 10 Years Longevity (5%); LL = 15 Years Longevity (5%+5%)

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Effective June 14, 2018

	Step 1	Step 1 LL	Step 1 LL	Step 1 LL	Step 2	Step 2 LL	Step 2 LL	Step 2 LL	Step 3	Step 3 LL	Step 3 LL	Step 3 LL	Step 4	Step 4 LL	Step 4 LL	Step 4 LL	Step 5	Step 5 LL	Step 5 LL	Step 6	Step 6 LL	Step 6 LL
SR ACCOUNTING TECHNICIAN	24.65	25.88	27.11	25.89	27.18	28.47	27.18	28.54	29.97	31.40	29.97	31.47	28.54	29.97	31.40	29.97	29.97	31.47	32.97	31.47	33.04	34.61
SR CUSTOMER SERVICE REP	21.43	22.50	23.57	22.51	23.64	24.77	23.64	24.81	25.99	27.29	26.02	27.32	24.81	26.05	27.29	26.02	26.02	27.32	28.62	27.32	28.73	30.10
SR FAC MAINT WKR	24.24	25.45	26.66	25.41	26.68	27.95	26.68	27.99	29.32	30.77	29.32	30.78	27.97	29.37	30.77	29.32	29.32	30.78	32.25	30.78	32.32	33.86
SR FINANCIAL ANALYST	38.18	40.09	42.00	40.09	42.09	44.09	42.10	44.21	46.32	48.41	46.32	48.52	44.20	46.41	48.52	46.41	46.41	48.73	51.05	48.73	51.17	53.61
SR IT TECH	26.58	27.91	29.24	27.95	29.35	30.75	29.29	30.75	32.21	33.84	32.21	33.94	30.76	32.30	33.84	32.33	33.95	35.57	33.94	35.64	37.34	39.04
SR PAYROLL SPECIALIST	26.92	28.27	29.62	28.26	29.67	31.08	29.68	31.16	32.64	34.28	32.64	34.38	31.16	32.72	34.28	32.72	34.38	36.00	34.38	36.07	37.79	39.52
SR SYS ADMIN	38.39	40.31	42.23	40.29	42.30	44.31	42.32	44.44	46.56	48.90	46.56	48.90	44.46	46.68	48.90	46.68	46.68	49.01	51.34	49.02	51.47	53.92
SR SAFETY SPECIALIST	38.39	40.31	42.23	40.29	42.30	44.31	42.32	44.44	46.56	48.90	46.56	48.90	44.46	46.68	48.90	46.68	46.68	49.01	51.34	49.02	51.47	53.92
SR TRANS PLANNER	31.90	33.50	35.10	33.50	35.18	36.86	35.18	36.94	38.70	40.62	38.70	40.82	36.92	38.77	40.82	38.77	38.77	41.15	43.04	40.82	42.76	44.80
SUPERVISOR OF REVENUE COLLECTIONS	28.28	29.69	31.10	29.74	31.23	32.72	31.25	32.81	34.37	36.08	34.37	36.15	32.80	34.44	36.08	34.43	36.15	37.87	36.14	37.95	39.76	41.68
SYS ADMIN	33.18	34.84	36.50	34.81	36.55	38.29	36.58	38.41	40.24	42.13	40.24	42.13	38.39	40.31	42.23	40.24	42.13	44.05	42.13	44.05	46.06	48.14
TICKET & PASS PROGRAM SPECIALIST	20.03	21.03	22.03	21.05	22.10	23.15	22.09	23.19	24.29	25.55	24.29	25.55	23.23	24.39	25.55	24.37	25.59	26.81	25.58	26.86	28.14	29.53
TRANSIT SURVEYOR	17.00	17.85	18.70	17.91	18.81	19.71	18.79	19.73	20.67	21.68	20.67	21.68	19.70	20.69	21.68	20.67	21.68	22.80	21.68	22.84	24.08	25.39
TRANSPORT PLANNING	22.74	23.88	25.02	23.87	25.06	26.25	25.05	26.30	27.55	28.98	27.55	28.98	26.34	27.66	28.98	27.63	29.01	30.39	29.03	30.48	31.93	33.46
TRANSPORT PLANNER	30.38	31.90	33.42	31.90	33.50	35.10	33.50	35.18	36.86	38.70	36.86	38.77	35.18	36.94	38.70	36.92	38.77	40.62	38.78	40.72	42.66	44.66
VEH SERV DETAILER	19.66	20.64	21.62	20.61	21.64	22.67	21.62	22.70	23.78	24.96	23.78	24.96	22.68	23.81	24.94	23.80	24.99	26.15	24.96	26.21	27.46	28.71
VEH SERV TECHNICIAN	21.62	22.70	23.78	22.68	23.81	24.94	23.80	24.99	26.18	27.46	26.18	27.46	24.96	26.21	27.46	26.15	27.46	28.71	27.48	28.85	30.22	31.64
VEH SERV WKR I	16.99	17.84	18.69	17.82	18.71	19.60	18.68	19.61	20.54	21.55	20.54	21.55	19.59	20.57	21.55	20.58	21.61	22.64	21.60	22.68	23.76	24.88
VEH SERV WKR II	18.71	19.65	20.59	19.66	20.64	21.62	20.61	21.64	22.67	23.78	22.67	23.78	21.62	22.70	23.78	22.68	23.81	24.94	23.80	24.99	26.18	27.46

L = 10 Years Longevity (5%); LL = 15 Years Longevity (5%+5%)

Calculation Method:

- Step 1: Calculate 5% of the Base (Base Step x 0.05)
- Step 2: Base Step + 5% of the Base (as calculated in Step 1) to calculate L (10 Years)
- Step 3: Base Step + 2 x 5% of the Base (as calculated in Step 1) to calculate LL (15 Years)

Example:

- Step 1: Base Rate = \$28.36; 5% of the Base Rate = \$28.36 x 0.05 = \$1.42
- Step 2: \$28.36 + \$1.42 = \$29.78 (6L)
- Step 3: \$28.36 + \$1.42 + \$1.42 = \$31.20 (6LL)

Date 5/19/17

9-03A.29

Tentative Agreement

Article 10.1 Pay Rates
Agree to pay scales as provided above.

Alex Clifford, CEO/General Manager, Santa Cruz METRO
 Joan Reyes, President, SCA Chapter
 Olivia Martinez, Lead Internal Organizer, SEIU Local 521

5/18/17
5/18/17

Effective June 14, 2018

	Step 1	Step 1 L	Step 1 LL	Step 2	Step 2 L	Step 2 LL	Step 3	Step 3 L	Step 3 LL	Step 4	Step 4 L	Step 4 LL	Step 5	Step 5 L	Step 5 LL	Step 6	Step 6 L	Step 6 LL	
PSA SALARY SCHEDULE																			
ASST SAFETY AND TRAINING COORDINATOR	30.29	31.80	33.31	31.79	33.38	34.97	33.38	35.05	36.72	35.04	36.79	38.54	36.80	38.64	40.48	38.64	40.57	42.50	
FLT MAINT SUPERVISOR	31.13	32.69	34.25	32.68	34.31	35.94	34.31	36.03	37.75	36.01	37.81	39.61	37.80	39.69	41.58	39.67	41.65	43.63	
SAFETY & TRAINING COORDINATOR	31.80	33.39	34.98	33.38	35.05	36.72	35.05	36.80	38.55	36.79	38.63	40.47	38.64	40.57	42.50	40.57	42.60	44.63	
SERVICE PLANNING SUPERVISOR	33.50	35.18	36.86	35.20	36.96	38.72	36.99	38.84	40.69	38.85	40.79	42.73	40.78	42.82	44.86	42.83	44.97	47.11	
SUPERVISOR OF PARTS & MATERIAL - FM	30.10	31.61	33.12	31.64	33.22	34.80	33.19	34.85	36.51	34.82	36.56	38.30	36.51	38.34	40.17	38.32	40.24	42.16	
SUPERVISING ACCOUNTANT	35.97	37.77	39.57	37.77	39.66	41.55	39.66	41.64	43.62	41.64	43.72	45.80	43.72	45.91	48.10	45.91	48.21	50.51	
TRANSPORT PLAN SUPV	33.50	35.18	36.86	35.18	36.94	38.70	36.92	38.77	40.62	38.78	40.72	42.66	40.72	42.76	44.80	42.76	44.90	47.04	
TRANSIT SUPERVISOR	28.60	30.03	31.46	30.03	31.53	33.03	31.52	33.10	34.68	33.10	34.76	36.42	34.77	36.51	38.25	36.50	38.33	40.16	

L = 10 Years Longevity (5%); LL = 15 Years Longevity (5%+5%)

Article 10.2 Longevity.

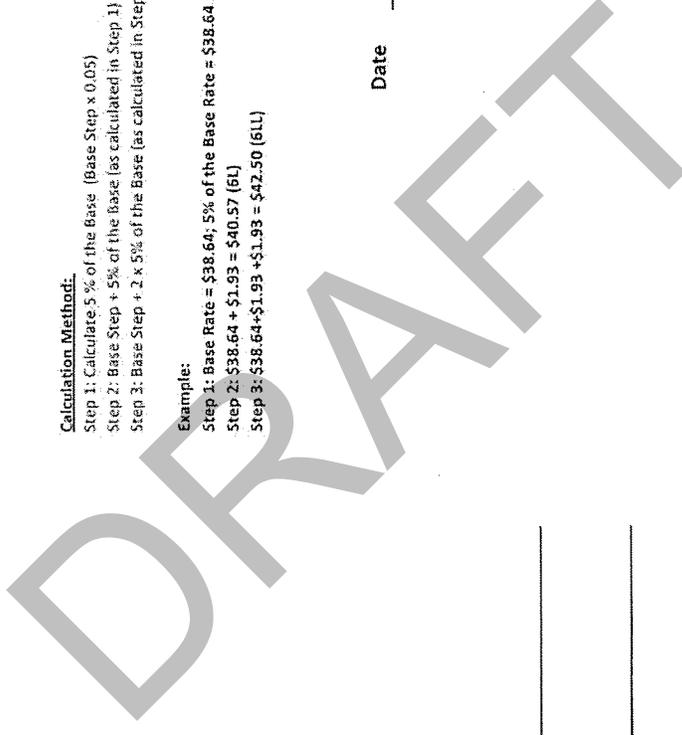
"METRO shall compensate an employee with longevity increments as follows:
 5% of the base salary after ten (10) years of continuous service.
 An additional 5% of the base salary after fifteen (15) years of continuous service."

Calculation Method:

Step 1: Calculate 5% of the Base (Base Step x 0.05)
 Step 2: Base Step + 5% of the base (as calculated in Step 1) to calculate L (10 Years)
 Step 3: Base Step + 2 x 5% of the Base (as calculated in Step 1) to calculate LL (15 Years)

Example:

Step 1: Base Rate = \$38.64; 5% of the Base Rate = \$38.64 x 0.05 = \$1.93
 Step 2: \$38.64 + \$1.93 = \$40.57 (6L)
 Step 3: \$38.64 + \$1.93 + \$1.93 = \$42.50 (6LL)



Tentative Agreement

Article 10.1 Pay Rates

Agree to pay scales as provided above

Alex Clifford, CEO/General Manager, Santa Cruz METRO

Michael Rios, President, PSA Chapter

Date 5/18/17

9-03A.30

Effective June 14, 2018

	Step 1	Step 1 LL	Step 1 LL	Step 2	Step 2 L	Step 2 LL	Step 3	Step 3 L	Step 3 LL	Step 4	Step 4 L	Step 4 LL	Step 5	Step 5 L	Step 5 LL	Step 6	Step 6 L	Step 6 LL	
VMU SALARY SCHEDULE																			
BODY REPAIR MECHANIC	25.29	26.55	27.81	26.55	27.88	29.21	27.88	29.27	30.66	29.27	30.73	32.19	30.73	32.27	33.81	32.27	33.88	35.49	
ELECTRONIC TECHNICIAN	26.58	27.91	29.24	27.91	29.31	30.71	29.31	30.78	32.25	30.78	32.32	33.86	32.32	33.94	35.56	33.94	35.64	37.34	
FM LEAD MECHANIC	27.91	29.31	30.71	29.31	30.78	32.25	30.78	32.32	33.86	32.32	33.94	35.56	33.94	35.64	37.34	35.64	37.42	39.20	
FM MECHANIC I	24.10	25.31	26.52	25.31	26.58	27.85	26.58	27.91	29.24	27.91	29.31	30.71	29.31	30.78	32.25	30.78	32.32	33.86	
FM MECHANIC II	25.31	26.58	27.85	26.58	27.91	29.24	27.91	29.31	30.71	29.31	30.78	32.25	30.78	32.32	33.86	32.32	33.94	35.56	
FM MECHANIC III	26.58	27.91	29.24	27.91	29.31	30.71	29.31	30.78	32.25	30.78	32.32	33.86	32.32	33.94	35.56	33.94	35.64	37.34	
LEAD PARTS CLERK-FM	25.04	26.29	27.54	26.29	27.60	28.91	27.60	28.98	30.36	28.98	30.43	31.88	30.43	31.95	33.47	31.95	33.55	35.15	
PARTS CLERK	20.15	21.16	22.17	21.16	22.22	23.28	22.22	23.33	24.44	23.33	24.50	25.67	24.50	25.73	26.96	25.73	27.02	28.31	
RECEIVING PARTS CLERK	21.73	22.82	23.91	22.82	23.96	25.10	23.96	25.16	26.36	25.16	26.42	27.68	26.42	27.74	29.06	27.74	29.13	30.52	
UPHOLSTERER I	22.82	23.96	25.10	23.96	25.16	26.36	25.16	26.42	27.68	26.42	27.74	29.06	27.74	29.13	30.52	29.13	30.59	32.05	
UPHOLSTERER II																			

L = 10 Years Longevity (5%); LL = 15 Years Longevity (5%+5%)

Article 10.2 Longevity.

"METRO shall compensate an employee with longevity increments as follows:
 5% of the base salary after ten (10) years of continuous service.
 An additional 5% of the base salary after fifteen (15) years of continuous service."

Calculation Method:

Step 1: Calculate 5% of the Base (Base Step x 0.05)
 Step 2: Base Step + 5% of the Base (as calculated in Step 1) to calculate L (10 Years)
 Step 3: Base Step + 2 x 5% of the Base (as calculated in Step 1) to calculate LL (15 Years)

Example:

Step 1: Base Rate = \$32.27; 5% of the Base Rate = \$32.27 x 0.05 = \$1.61
 Step 2: \$32.27 + \$1.61 = \$33.88 (L)
 Step 3: \$32.27 + \$1.61 + \$1.61 = \$35.49 (LL)

Tentative Agreement

Article 10.1 Pay Rates

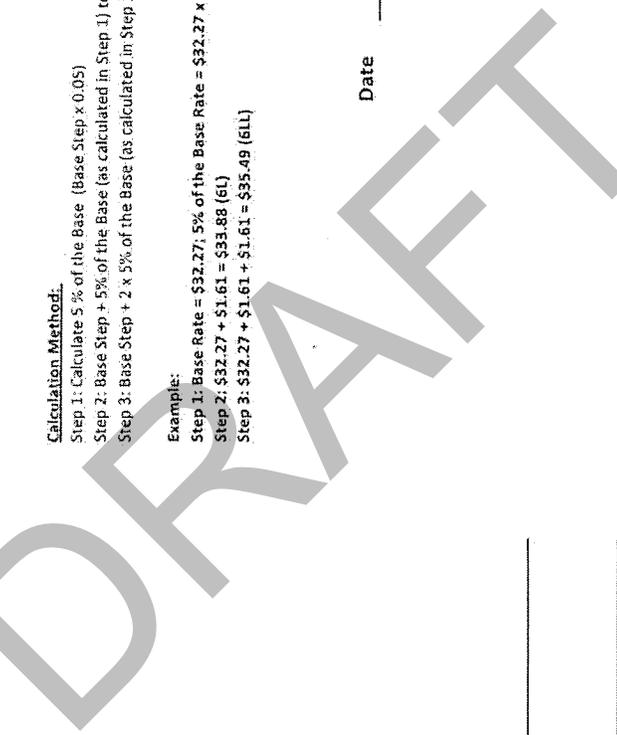
Agree to pay scales as provided above.

Alex Clifford, CEO/General Manager, Santa Cruz METRO

Antonio Castillo, President, VMU Chapter

9-03A.31

Date 5/19/17



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Attachment B



**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (METRO)
BOARD OF DIRECTORS SPECIAL MEETING MINUTES*
AUGUST 9, 2019 – 11:30 AM
METRO ADMIN OFFICES
110 VERNON STREET, SANTA CRUZ, CA**

A special meeting of the Board of Directors of the Santa Cruz Metropolitan Transit District (METRO) was convened on Friday, August 9, 2019 at the METRO Admin Offices, 110 Vernon Street, Santa Cruz, 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.

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SECTION I: OPEN SESSION

- 1 CALL TO ORDER AT 11:31AM** by Chair Bottorff
- 2 ROLL CALL:** The following Directors were present, representing a quorum:

Director Ed Bottorff
Director Trina Coffman-Gomez
Director Aurelio Gonzalez
Director John Leopold
Director Donna Lind
Director Cynthia Mathews
Director Bruce McPherson
Director Donna Meyers
Director Larry Pageler
Director Dan Rothwell
Director Mike Rotkin
Ex-Officio Director Stephen Preston
Ex-Officio Director Alta Northcutt

City of Capitola
City of Watsonville
City of Watsonville
County of Santa Cruz
City of Scotts Valley
City of Santa Cruz
County of Santa Cruz
City of Santa Cruz
County of Santa Cruz
County of Santa Cruz
County of Santa Cruz
UC Santa Cruz
Cabrillo College

Staff Present:

Alex Clifford
Julie Sherman

METRO CEO/General Manager
METRO General Counsel

Directors Mathews, McPherson, Meyers and Pageler were absent.

Attachment B

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

Delee Brubeck
Brandon Freeman, SMART-UTU

Jamie Jones

3 COMMUNICATIONS TO THE BOARD OF DIRECTORS

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

4 LABOR ORGANIZATION COMMUNICATIONS

Brandon Freeman, SMART Local 23, announced to the assembly that the ParaCruz membership voted to accept the Tentative Agreement (TA) as is. The Fixed Route membership rejected the TA as it currently stands. He added the membership will not agree to anything that removes double time from the Labor Agreement; they might agree to a TA if double time is reinserted.

Speaking on behalf of all SEIU members, Joan Jeffries, SEA Chapter President, reminded the assembly of the numerous ways the Union has supported METRO; e.g., through various ballot measures, pay cuts/pay freezes, etc. They have worked diligently to save METRO money. METRO now has a healthy reserve, it insists on freezing salaries for 41 members as a result of a salary survey that everyone agrees was poorly done. They have demonstrated good faith throughout the negotiations, agreeing to terms that would save METRO money. She urged the elected members of the Board to stand with SEIU workers and encourage METRO management to approach the negotiations fairly.

Olivia Martinez, SEIU representative, voiced several concerns with the CEO/General Manager, the proposals that have been exchanged, and the status of the negotiations. They want a fair contract.

5 REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION

General Counsel Julie Sherman announced the following items to be discussed in today's closed session, noting an announcement was anticipated after the closed session.

CONFERENCE WITH LABOR NEGOTIATORS (GOVERNMENT CODE SECTION 54957.6)

Agency Negotiators: Alex Clifford, CEO/General Manager
Patrick Glenn, Labor Counsel

Employee Organizations: SMART, Local 23
SMART, Local 23 – ParaCruz Operations
SEIU, Local 521

CLOSED SESSION BEGAN AT 12:14PM

RECONVENED TO OPEN SESSION AT 1:46PM time

8 REPORT OF CLOSED SESSION ITEMS

Julie Sherman, General Counsel, announced:

- The Board voted 6-1 to ratify the tentative agreement with SMART Local 23, Fixed Route, pending approval of the bargaining unit.

Attachment B

Board of Directors Special Meeting Minutes
August 9, 2019
Page 3 of 3

- The Board voted 7-0 to ratify the tentative agreement with SMART Local 23, ParaCruz

Final MOU terms and wage tables will be subject to approval in a future open session action.

Chair Bottorff adjourned the meeting at 1:48PM

DRAFT

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DATE: August 23, 2019
TO: Board of Directors
FROM: Daniel L. Zaragoza, Operations Manager, Paratransit Division
SUBJECT: ACCEPT AND FILE THE METRO PARACRUZ OPERATIONS STATUS REPORT FOR APRIL, MAY AND JUNE 2019

I. RECOMMENDED ACTION

That the Board of Directors accept and file the quarterly METRO ParaCruz Operations Status Report for April, May and June 2019

II. SUMMARY

- Summary review of monthly operational statistics for ParaCruz:
Comparing the monthly statistics of FY18 to the monthly statistics of FY19:
 - In April, the number of ParaCruz rides increased by 171
 - In May, the number of ParaCruz rides decreased by 11
 - In June, the number of ParaCruz rides increased by 336
- Summary of monthly operational information about ParaCruz:
 - April number of total ParaCruz rides: 6,488
 - May number of total ParaCruz rides: 6,398
 - June number of total ParaCruz rides: 5,774

III. DISCUSSION/BACKGROUND

Comparing March 2019 statistics to April 2019, ParaCruz rides increased by 16. Comparing April 2019 statistics to May 2019, ParaCruz rides decreased by 90. Comparing May 2019 statistics to June 2019, rides decreased by 624.

ParaCruz is currently funded for 30 Paratransit Operators. None of these positions are vacant; four new Operators have been hired and are currently in training.

METRO ParaCruz is the federally mandated ADA complementary paratransit program of the Santa Cruz Metropolitan Transit District (METRO), providing shared ride, door-to-door demand-response transportation to customers certified as having disabilities which prevent 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. The Eligibility Coordinator and Candis Almanza, Paratransit Supervisor, provided additional data.

V. FINANCIAL CONSIDERATIONS/IMPACT

There are no financial considerations for this report.

VI. ATTACHMENTS

- Attachment A:** ParaCruz On-time Performance Charts for April, May and June 2019
- Attachment B:** Comparative Operating Statistics Tables for April, May and June 2019
- 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 for April 2019.

	April 2018	April 2019
Total pick ups	6,317	6488
Percent in “ready window” *	86.81%	86.47%
1 to 5 minutes late	5.35%	4.64%
6 to 10 minutes late	3.13%	3.45%
11 to 15 minutes late	1.88%	1.91%
16 to 20 minutes late	1.41%	1.43%
21 to 25 minutes late	.62%	.80%
26 to 30 minutes late	.38%	.51%
31 to 35 minutes late	.17%	.40%
36 to 40 minutes late	.16%	.12%
41 or more minutes late (excessively late/missed trips)	.08%	.26%
Total beyond “ready window”	13.19%	13.53%

*Target: 90%

On-time Performance

During April, ParaCruz’ on time performance increased by 3.95% from last month. The Operators recently hired are now in revenue service. ParaCruz had three Operators on long term disability. The total number of available working ParaCruz Operators is now 24 per weekday, not including Operators on annual leave.

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

During the month of April 2019, ParaCruz received four Customer Service Reports. One of the reports was a valid complaint for a late ride. Three were not valid: 1) A driver alleged a ParaCruz Operator did not wait for his turn to go at a stop sign, video shows that he did;2) A person complained that ParaCruz does not have an app that shows when the Operator is arriving; and, 3) A person complained that the facility where he resides constantly cancels his rides.

Attachment A

ParaCruz On-time Performance Report for May 2019.

	May 2018	May 2019
Total pick ups	6,409	6,398
Percent in “ready window”	85.71%	94.97%
1 to 5 minutes late	5.43%	1.83%
6 to 10 minutes late	3.71%	1.17%
11 to 15 minutes late	2.45%	.91%
16 to 20 minutes late	1.28%	.39%
21 to 25 minutes late	1.53%	.33%
26 to 30 minutes late	.41%	.20%
31 to 35 minutes late	.20%	.08%
36 to 40 minutes late	.17%	.05%
41 or more minutes late (excessively late/missed trips)	.11%	.08%
Total beyond “ready window”	14.29%	5.03%

*Target: 90%

On-time Performance

During May, ParaCruz' on time performance increased by 8.50% from last month. Ridership slightly decreased from last month. ParaCruz had one Operator resign. ParaCruz had one Operator on long term disability. The total number of available working ParaCruz Operators is 24 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 2019, ParaCruz received three Customer Service Reports. All three were compliments for ParaCruz Operators.

Attachment A

ParaCruz On-time Performance Report for June 2019.

	June 2018	June 2019
Total pick ups	5,438	5774
Percent in “ready window”	86.50%	94.31%
1 to 5 minutes late	5.61%	1.92%
6 to 10 minutes late	2.67%	1.83%
11 to 15 minutes late	2.48%	.72%
16 to 20 minutes late	.96%	.55%
21 to 25 minutes late	.81%	.27%
26 to 30 minutes late	.48%	.14%
31 to 35 minutes late	.22%	.13%
36 to 40 minutes late	.15%	.11%
41 or more minutes late (excessively late/missed trips)	.13%	.03%
Total beyond “ready window”	13.50%	5.69%

*Target: 90%

On-time Performance

During June, ParaCruz' on time performance decreased by 0.66 % from last month. June had a decrease in ridership from last month. ParaCruz has three Operators on long term disability. The total number of available working ParaCruz Operators is 23 per weekday, not including Operators on annual leave.

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

During the month of June 2019, ParaCruz received three Customer Service Reports: One was not valid. A person alleged that an Operator was speeding; AVL was reviewed and confirmed the Operator was driving under the speed limit; and, two were compliments for Operators.

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Attachment B

Comparative Operating Statistics through April 2019.

	April 2018	April 2019	FY 18	FY 19	Performance Averages	Performance Goals
Requested	7,068	7,392	69,070	70,197	6,962	
Performed	6,317	6,488	60,362	61,321	6,097	
Cancels	20.57%	22.29%	21.68%	22.81%	22.53%	
No Shows	2.74%	3.77%	3.46%	3.74%	3.71%	Less than 3%
Total miles	53,633	51,359	512,337	496,734	49,796	
Av trip miles	6.23	5.77	6.26	6.03	6.14	
Within ready window	86.81%	86.47%	85.07%	82.84%	83.44%	90.00% or better
Call center volume	5,015	5,807	N/A	N/A	N/A	New phone system 1/6/18
Hold times less than 2 minutes	95.70%	93.88%	N/A	N/A	N/A	Greater than 90%
Distinct riders	699	686	1,595	1,554	681	
Most frequent rider	53 rides	57 rides	378 rides	367 rides	59 rides	
Shared rides	65.0%	66.3%	64.6%	65.5%	65.01%	Greater than 60%
Passengers per rev hour	1.84	1.92	1.87	1.97	1.95	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	61.61%	62.48%	63.66%	62.45%	63.35%	
Rides > 10	38.39%	37.52%	36.34%	37.55%	36.65%	
Denied Rides	0	0	0	0	0	Zero
Missed Trips	5	18	170	186	17	
Excessively Long Trips	1	2	20	25	2	New Stat Jan 2017
# Trips at Base Fare	4,002	3,976	38,115	38,665	3841	
# Trips > Base Fare	1,230	1,247	11,854	10,879	1,093	

Attachment B

Comparative Operating Statistics through May 2019.

	May 2018	May 2019	FY 18	FY 19	Performance Averages	Performance Goals
Requested	7,197	7,424	76,267	77,621	6,915	
Performed	6,409	6,398	66,771	67,693	6063	
Cancels	21.34%	24.33%	21.65%	22.96%	22.16%	
No Shows	3.38%	3.56%	3.45%	3.72%	3.63%	Less than 3%
Total miles	53,164	52,084	565,598	548,797	50360	
Av trip miles	6.12	5.86	6.25	6.02	6.18	
Within ready window	85.71%	94.97%	85.12%	83.98%	83.95%	90.00% or better
Call center volume	5,222	5391	N/A	N/A	N/A	information not available
Hold times less than 2 minutes	95.51%	94.50%	N/A	N/A	N/A	information not available
Distinct riders	712	728	1,662	1,622	673	
Most frequent rider	55 rides	54 rides	409 rides	390 rides	59 rides	
Shared rides	65.8%	62.3%	65.8%	65.1%	64.11%	Greater than 60%
Passengers per rev hour	1.92	1.82	1.87	1.96	1.92	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	61.94%	62.46%	61.94%	62.45%	63.29%	
Rides > 10	38.06%	37.54%	38.06%	37.55%	36.71%	
Denied Rides	0	0	0	0	0	Zero
Missed Trips	7	5	177	191	15	N/A
Excessively Long Trips	2	1	22	26	2	New Stat Jan 2017
# Trips Base Fare	3,952	3,956	42,066	42,618	3,836	
# Trips > Base Fare	1,263	1,160	13,117	12,042	1,102	

Attachment B

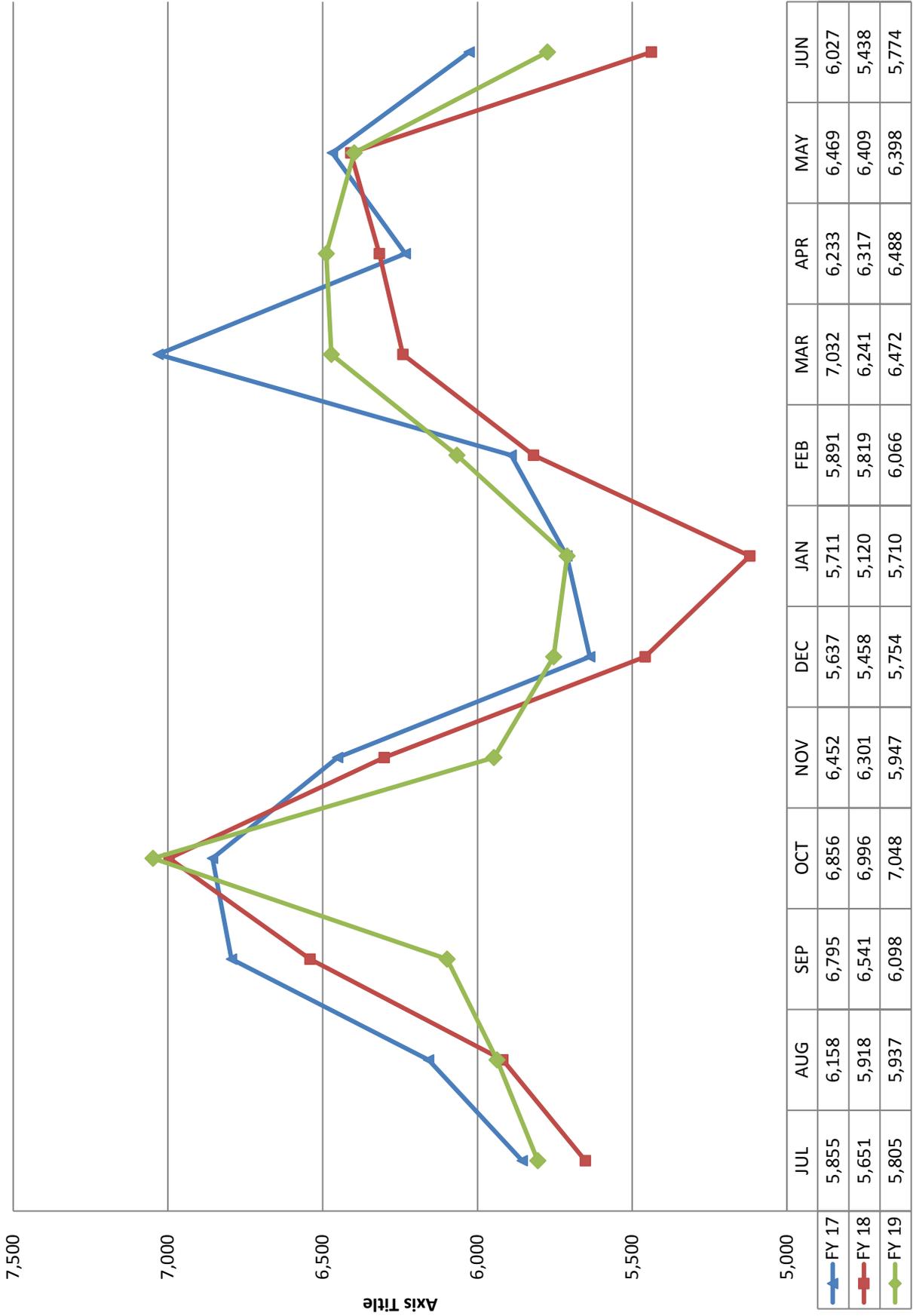
Comparative Operating Statistics through June 2019.

	June 2018	June 2019	FY 18	FY 19	Performance Averages	Performance Goals
Requested	6,145	6,381	82,412	84,002	7000.17	
Performed	5,438	5,774	72,209	73,467	6083	
Cancels	21.19%	22.03%	21.62%	22.89%	22.85%	
No Shows	3.71%	3.67%	3.47%	3.71%	3.72%	Less than 3%
Total miles	47,473	46,329	613,071	595,072	49611	
Av trip miles	6.40	5.80	6.26	6.00	6.07	
Within ready window	86.50%	94.31%	85.22%	84.75%	84.87%	90.00% or better
Call center volume	5,056	5,096	N/A	N/A	N/A	information not available
Hold times less than 2 minutes	91.47%	93.16%	N/A	N/A	N/A	information not available
Distinct riders	666	658	1,726	1,689	682	
Most frequent rider	59 rides	57 rides	445 rides	421 rides	59 rides	
Shared rides	59.9%	59.8%	64.4%	65.8%	64.71%	Greater than 60%
Passengers per rev hour	1.74	1.80	1.86	1.95	1.95	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	63.20%	62.83%	57.99%	62.48%	63.36%	
Rides > 10	36.80%	37.17%	42.01%	37.52%	36.64%	
Denied Rides	0	0	0	0	0	Zero
Missed Trips	7	2	184	193	16	N/A
Excessively Long Trips	0	1	19	27	2.25	New Stat Jan 2017
# Trips Base Fare	3,459	3,537	45,525	46,155	3848	
# Trips > Base Fare	980	987	14,097	13,029	1085	

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Attachment C

Number of Rides Comparison

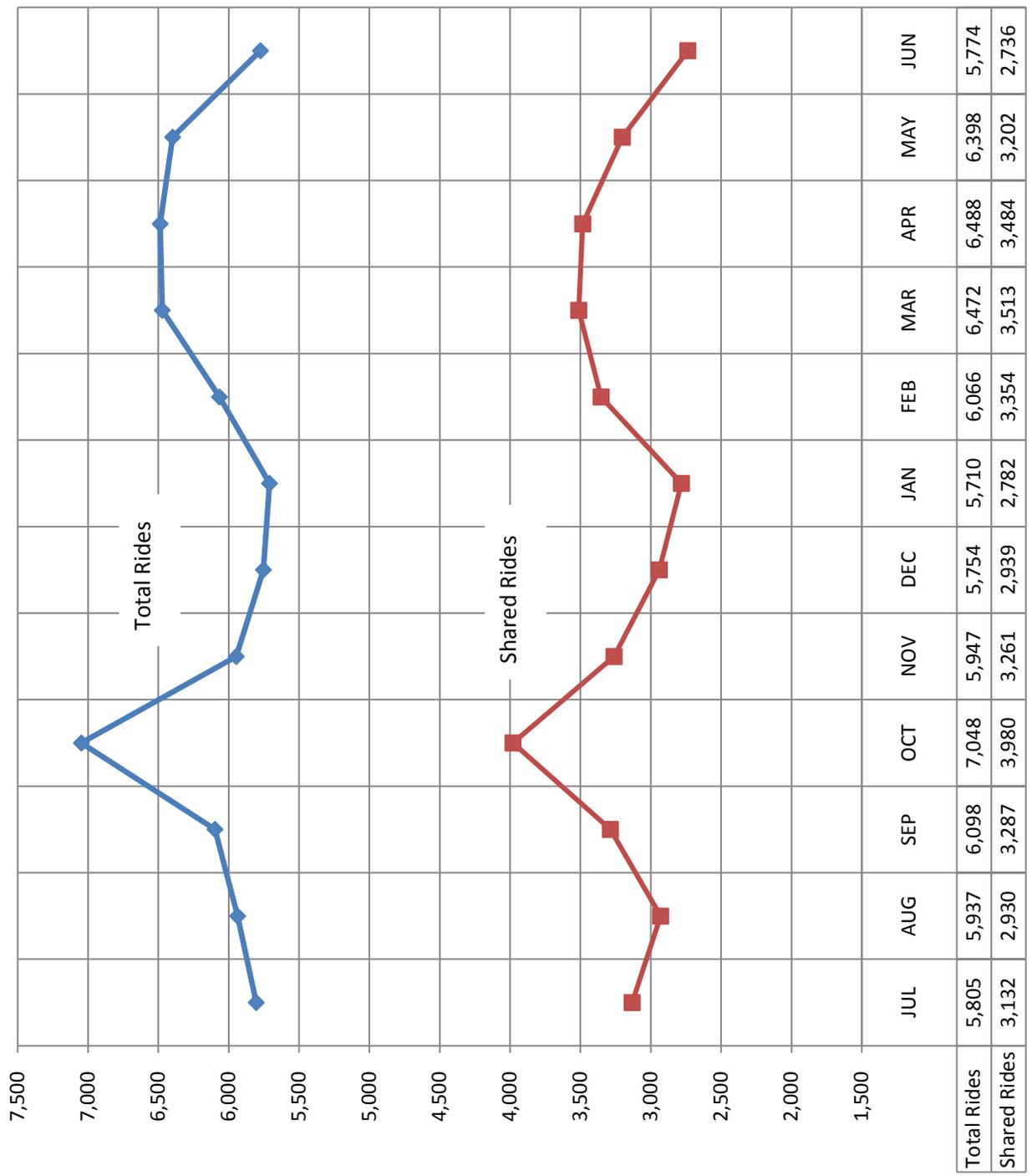


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Attachment D

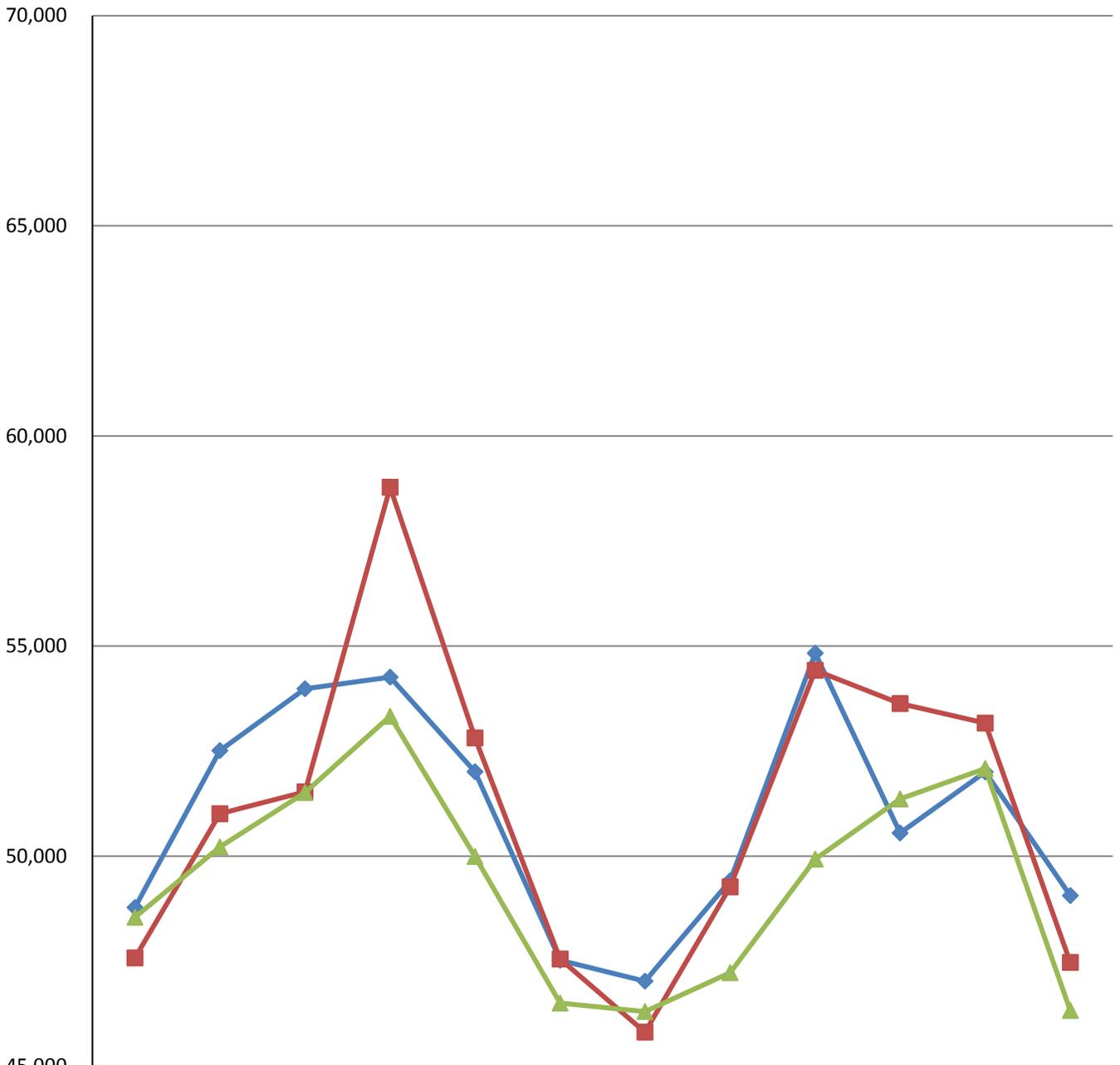
Total Ride vs. Shared Ride Count



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Attachment E

Annual Miles Comparison



	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
◆ FY 17	48,777	52,513	53,982	54,257	52,009	47,522	47,024	49,416	54,831	50,549	52,001	49,061
■ FY 18	47,578	51,011	51,532	58,776	52,811	47,551	45,811	49,271	54,426	53,633	53,164	47,473
▲ FY 19	48,549	50,216	51,513	53,331	49,990	46,501	46,300	47,226	49,928	51,359	52,084	46,329

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Attachment F

Monthly Assessments

MONTHLY ASSESSMENTS						
	UNRESTRICTED	RESTRICTED CONDITIONAL	RESTRICTED TRIP BY TRIP	TEMPORARY	DENIED	TOTAL
JULY 2018	47	0	0	1	0	48
AUGUST 2018	37	0	3	2	0	42
SEPTEMBER 2018	35	0	0	2	0	37
OCTOBER 2018	36	0	0	0	0	36
NOVEMBER 2018	26	1	0	0	0	27
DECEMBER 2018	17	0	0	0	0	17
JANUARY 2019	21	0	2	0	0	23
FEBRUARY 2019	10	0	0	1	0	11
MARCH 2019	30	0	1	0	0	31
APRIL 2019	17	1	2	3	2	25
MAY 2019	27	1	0	2	0	30
JUNE 2019	13	0	1	1	1	16

Number of Eligible Riders for the month of April 2019 = 3,535
Number of Eligible Riders for the month of May 2019 = 3,581
Number of Eligible Riders for the month of June 2019 = 3,582

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DATE: August 23, 2019
TO: Board of Directors
FROM: Barrow Emerson, Planning & Development Director
SUBJECT: METRO SYSTEM RIDERSHIP REPORTS FOR THE FOURTH QUARTER OF FY19

I. RECOMMENDED ACTION

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

II. SUMMARY

- FY19 Q4 total ridership increased 3.1% (+43,319) compared to FY18 Q4.
- Non-student ridership decreased 3.8% (-18,126)
- Highway 17 ridership decreased 2.8% (-2,123)
- UCSC ridership increased 8.7% (+65,119)
- Cabrillo College ridership decreased 2.1% (-1,551)

III. DISCUSSION/BACKGROUND

This report contains ridership summaries and ridership by route for Santa Cruz Metropolitan Transit District (METRO) fixed route bus service for the fourth quarter (Q4) of FY19 (April 1 – June 30, 2019). Quarterly ridership reports keep the Board of Directors apprised of METRO's ridership statistics and ridership trends:

- Attachment A shows system-wide and college student ridership statistics for Q4 of FY19 and makes year-over year comparisons with ridership statistics.
- Attachment B shows the average ridership and pass/fare usage per route and system-wide.

FY19 Q4 total fixed-route ridership increased 3.1% compared to FY18 Q4.

Reason(s) include:

- Local ridership increased 3.5%. Ridership on local routes was 94.8% of total fixed route ridership.
- Non-student ridership on METRO's local system decreased 3.8%. Non-students were 34.3% of the local ridership and 35.8% of total ridership.
 - Average weekend ridership decreased 10.2% compared to Q4 of last fiscal year.
 - The Bus Coalition recently released research based upon NTD data clarifying that since 2012, bus fleet size and service hours decreased 18% and 19%, respectively. This trend began prior to the widespread popularity of ridesharing and correlates to

the 57% cut in MAP-21 funding in 2012. The reduction in this funding source negatively affected bus agencies' ability to purchase new buses and forced bus agencies to reduce service in response.

- In FY17, METRO implemented a 13% reduction in weekday service and a 31% decrease to weekend service. While, partnerships with UCSC and Cabrillo College allowed METRO to grow weekday local ridership, weekend ridership continues on its downward trend.
- Student pass usage increased 7.7%
 - UCSC ridership increased 8.7%
 - Average weekday UCSC ridership increased 14.5%
 - UCSC reduced Transportation and Parking Services (TAPS) on-campus shuttle service in Q4 of FY19 because of the failed Student Transit Fee ballot measure in 2018. The Student Transit Fee measure passed in 2019 eliminating the need for further TAPS cuts, at this time.
 - Average weekend UCSC ridership decreased 16.2%
 - Weekend service offers a narrower span of service and reduced frequency compared to the weekday service.
 - Anecdotally, the increasing use of Transportation Network Companies (e.g., Uber and Lyft) is negatively impacting weekend ridership.
 - Cabrillo ridership decreased 2.1%
 - This is the second consecutive quarter with decreased Cabrillo ridership since the implementation of the Cabrillo Bus Pass in Q1 of FY17.
 - Cabrillo College reported decreased enrollment in the spring semester. METRO lacks the exact enrollment data, so it is difficult to state definitely how the decreased ridership correlates with decreased enrollment.
- Highway 17 ridership decreased 2.8%. Ridership on the commuter route was 5.2% of total fixed route ridership.
 - Increased access to private vehicles negatively affects transit ridership. A 2019 study conducted by the foundation TransitCenter revealed that an additional 11% of respondents have full-time access to a private vehicle, compared to two years ago.

- From 2015-2018, new vehicle registrations in California exceeded 2 million. However, new vehicle registration rates are forecast to decrease by as much as 4% in 2019.
- Increased telecommuting results in fewer riders utilizing transit daily.
 - Highway 17 15-Ride pass usage increased 14.2% while, 31-Day passes decreased 5.7%. A recent on-board survey indicates that almost one-quarter of the Hwy 17 riders utilize the service only 1-3 days per week.

Quarterly discounted ridership decreased 2.8% [Passes +0.5% and Cash -8.1%]

Reason(s) include:

- ParaCruz ridership increased 23.1% compared to Q4 of FY18

Regular pass and cash fares decreased 6.0% [Passes – 4.1% and Cash – 7.8%].

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 access to private vehicles, as mentioned previously, reduces transit ridership. Data provided by TransitCenter indicate that even partial access to a personal vehicle causes transit use to fall by more than seven days a month.
 - METRO is in the process of implementing improvements to its service, such as smartphone apps to reveal real-time locations of buses and the ability to purchase Highway 17 Express bus passes online. The expectation is that these improvements and others, such as Wi-Fi on all buses, will assist in not only retaining bus riders but also attracting ridership.

Attachment B shows average ridership per trip for all weekday and weekend routes in Q4 of FY19. System-wide, on average there are 32 riders per trip on weekdays and 28 riders per trip weekends. This is a 28.0% increase in per trip weekday ridership and a 7.0% decrease in weekend ridership per trip.

- The weekday route with the highest ridership average is Route 15
 - This route serves UCSC via Laurel West. This high ridership level per trip is largely due to the implementation of articulated buses on many of these trips.
- The weekend route with the highest ridership average is route 16.
 - These routes serve Laurel East and the West Side. This route has the greatest span of service of all UCSC routes on the weekend. Ridership in

the evenings increased due to reduced late night on-campus service, provided by TAPS.

- The weekday and weekend route with the lowest ridership average is Route 79.
 - This route serves Pajaro/East Lake. There are plans to review the ridership patterns of this route following the on-board survey conducted in April 2019, in conjunction with upcoming planning for the implementation of the Watsonville Circulator in 2020, to understand how to improve service for Watsonville riders.

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 Q4 (April 1 – June 30, 2019)

Attachment B: Quarterly Average Ridership by Route Report for FY19 Q4 (April 1 – June 30, 2019)

Prepared by: Cayla Hill, Planning Analyst

VII. APPROVALS

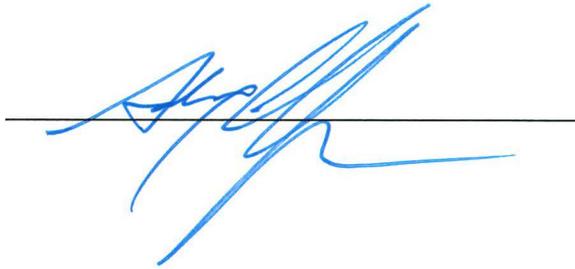
Barrow Emerson,
Planning and Development Director



Approved as to fiscal impact:
Angela Aitken, CFO



Alex Clifford, CEO/General Manager



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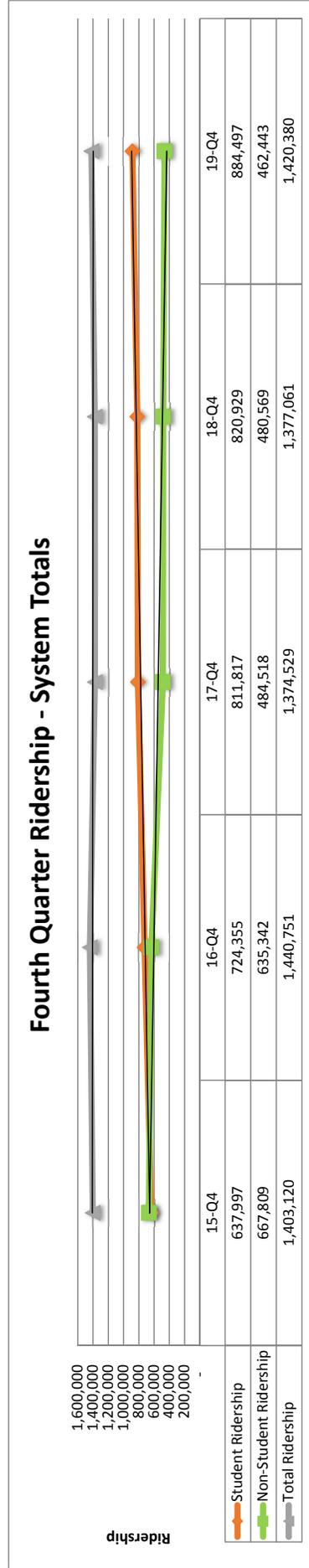
Quarterly System Ridership Summary

FY19 Q4 (April 1 - June 30, 2019)

Calendar Operating Days		Discounted Pass Usage (Senior/Disabled)			Regular Pass Usage				
	This Year	Last Year	FY19 Q4	FY18 Q4	% Change	This Year	Last Year	% Change	
Weekdays	64	65	104,987	104,487	0.5%	Local Pass Usage	145,217	151,030	-3.8%
Weekends	27	26				Hwy 17 Pass Usage	33,308	33,794	-1.4%
UCSC School Days *	53	53				Local Cruz Cash Usage	6,767	7,782	-13.0%
Cabrillo School Days **	40	40				Hwy 17 Cruz Cash Usage	2,426	3,182	-23.8%
						Total Pass Usage	187,718	195,788	-4.1%

Discounted Cash Usage (Senior/Disabled)			Regular Cash Usage				
	This Year	Last Year	% Change	This Year	Last Year	% Change	
Local Single Cash Fare	52,673	57,271	-8.0%	Local Single Cash Fare	157,993	167,309	-5.6%
Hwy 17 Single Cash Fare	5,494	6,023	-8.8%	Hwy 17 Single Cash Fare	33,708	40,499	-16.8%
Total Cash Usage	58,167	63,294	-8.1%	Total Cash Usage	191,701	207,808	-7.8%

System Totals			Student Pass Totals				
	FY19 Q4	FY18 Q4	% Change	This Year	Last Year	% Change	
Local Fixed Route	1,346,940	1,301,498	3.5%	UCSC	812,012	746,893	8.7%*
Highway 17 Express	73,440	75,563	-2.8%	Cabrillo	72,485	74,036	-2.1%**
System Total	1,420,380	1,377,061	3.1%	Student Total	884,497	820,929	7.7%



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Quarterly Average Ridership by Route Report

April 1, 2019 - June 30, 2019		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.	52	96%	0%	1%	1%	49	93%	0%	3%	2%
15	UCSC via Laurel West	70	97%	0%	1%	1%					
16	UCSC via Laurel East	67	96%	0%	1%	1%	64	96%	0%	1%	2%
19	UCSC via Lower Bay	58	94%	1%	1%	2%	53	91%	1%	4%	3%
20	UCSC via West Side	51	87%	2%	3%	4%	61	90%	1%	3%	3%
20D	UCSC via West Side Supp.	52	98%	0%	1%	1%					
22	UCSC/Coastal Science Campus	54	99%	0%	0%	0%					
Intercity											
35/35A	Santa Cruz/Scotts Valley/SLV	17	6%	5%	32%	36%	20	4%	4%	31%	30%
69A	Capitola Road/Watsonville	27	8%	7%	18%	24%	23	9%	6%	29%	23%
69W	Cap. Road/Cabrillo/Watsonville	30	8%	19%	20%	25%	25	10%	8%	26%	23%
71	Santa Cruz to Watsonville	30	5%	16%	21%	26%	25	4%	0%	32%	25%
91X	Santa Cruz/Watsonville Express	15	5%	42%	15%	19%					
Rural											
40	Davenport/North Coast	22	1%	1%	34%	54%					
41	Bonny Doon	11	19%	3%	36%	43%					
42	Davenport/Bonny Doon	13	19%	3%	28%	31%	14	17%	2%	25%	30%
Local											
3	Mission/Beach	10	29%	5%	20%	25%	9	39%	4%	36%	13%
4	Harvey West/Emeline	15	6%	4%	23%	33%					
55	Rio Del Mar	15	2%	40%	14%	20%	9	1%	14%	53%	17%
66	Live Oak via 17th	15	14%	6%	23%	29%	13	13%	5%	37%	24%
68	Like Oak via Broadway/Portola	13	19%	7%	20%	26%	11	18%	5%	34%	19%
72	Watsonville Hospital/Pinto Lake	14	1%	9%	13%	23%	9	1%	7%	41%	25%
74S	PVHS/Watsonville Hospital	15	1%	4%	17%	24%					
75	Green Valley Road	14	1%	8%	13%	24%	14	1%	4%	47%	24%
79	Pajaro/East Lake	5	1%	15%	17%	26%	5	2%	9%	42%	27%
Highway 17											
Hwy 17	Hwy 17 Express	15	-	-	47%	55%	21	-	-	9%	31%
Avg. Ridership per Trip		32	59%	5%	11%	13%	28	47%	2%	16%	15%

27 Calendar School Days of SJSU
 40 Calendar School Days of Cabrillo
 53 Calendar School Days of UCSC

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DATE: August 23, 2019
TO: Board of Directors
FROM: Wondimu Mengistu, Grants/Legislative Analyst
SUBJECT: ACCEPT AND FILE QUARTERLY STATUS REPORT OF GRANT APPLICATIONS AND ACTIVE GRANTS FOR THE FOURTH QUARTER OF FY19

I. RECOMMENDED ACTION

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

II. SUMMARY

- During the fourth quarter (Q4) of FY19 (April 1 - June 30, 2019), the Santa Cruz Metropolitan Transit District (METRO) received approval for two formula grants, which will be used for both operating and capital assistance.
- Staff submitted a competitive grant application for the Federal Transit Administration (FTA) Low and No Emission Bus program to install fast charging infrastructure at the Watsonville Transit Center (WTC) to support the deployment of METRO's Zero-Emission Buses (ZEBs). METRO was not awarded any of the limited number of nationwide awards, including the only one in California.
- Previously awarded grant-funded projects are underway to purchase vehicle replacements and upgrade facilities.
- A list of METRO's active grants (Attachment A) is provided quarterly to apprise the Board of grant funding status.
- No action is required; this report is for information only.

III. DISCUSSION/BACKGROUND

During Q4 of FY19, the Santa Cruz County Regional Transportation Commission (RTC) approved METRO's Fiscal Year (FY) 20 claim for Transportation Development Act (TDA) formula funds to provide a total of \$11,538,007 for fixed-route public transit and Americans with Disabilities Act (ADA) complementary paratransit operations and \$1,156,095 for capital improvements. Caltrans also approved METRO's FY19 Low Carbon Transit Operations Program (LCTOP) allocation request of \$646,496 to build electric charging infrastructure at Judy K. Souza Operating Facility (JKSOF) for new METRO ZEBs which will arrive in 2020.

METRO submitted a competitive grant application for the FTA Low and No Emission Bus program to install fast charging infrastructure at the Watsonville Transit Center (WTC) to support the deployment of METRO's Zero-Emission Buses (ZEBs). Unfortunately, the FTA did not choose this project for funding when it announced awards in July. The project competed against more than 165 applicants nationwide for \$85 million available this year under the FTA Low and No Emission Bus program. Only 38 projects were selected nationwide, including only one in California. METRO received funds from this program in 2016 to purchase three ZEBs to operate on the popular Highway 17 Express routes connecting Santa Cruz and Silicon Valley.

Active operating and capital improvement grants total \$61,219,327 in formula and \$15,330,683 in competitive funds. Of this amount, \$13,064,587 is to replace and refurbish buses. The remaining awarded funds are for operating assistance and capital improvement projects.

Currently, there are no pending grant applications. This staff report apprises the Board of active grants (Attachment A) that fund METRO's operations and capital improvements.

METRO staff continuously seeks grant funds for operating assistance and capital improvements. During the next three months, staff will prepare grant applications for applications in the Caltrans' Enhanced Mobility of Seniors and Individuals with Disabilities Program (FTA 5310), Transit and Intercity Rail Capital Program (TIRCP) and the FY19 FTA 5339(a) Buses and Bus Facilities Formula Program.

IV. FINANCIAL CONSIDERATIONS/IMPACT

There are current active grants (Attachment A) of \$76,550,010 for METRO's operations and capital improvements projects. The Operating and Capital Budgets will be amended as necessary when grants are awarded.

V. ALTERNATIVES CONSIDERED

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

VI. ATTACHMENTS

Attachment A: Active Grants as of August 2019

Prepared by: Wondimu Mengistu, Grants/Legislative Analyst

VII. APPROVALS:

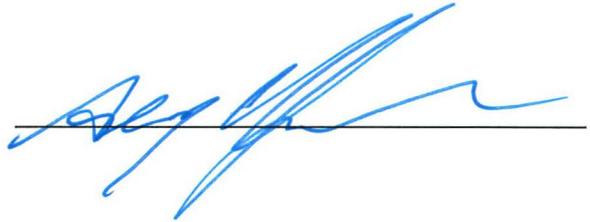
Barrow Emerson, Planning
and Development Director



Approved as to fiscal impact:
Angela Aitken, CFO



Alex Clifford, CEO/General Manager



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Attachment A

Santa Cruz METRO Active Grant as of 8/23/19

#	Project Description	Funding Source	\$ Budget Total Project
Operating Projects			
1	FY19 Urban transit operati	FY19 FTA 5307 Urban Operating Assistance Formula Award: 5/28/19	\$ 7,060,410
2	FY19 Rural transit operation	FY19 FTA 5311 Rural Operating Assistance Formula administered by Caltrans Award: 7/1/19	\$ 474,936
3	FY18 Urban Transit Operations	FY18 FTA 5307 Urban Operating Assistance Formula Award: 6/21/19	\$ 6,794,772
4	Operate Watsonville Circulator	FY18 Air District 2018 AB2766 Program Expration: 1/29/20	\$ 678,111
5	FY20 operating assistance	FY20 SCCRTC Transportation Development Act-Local Transportation Fund (TDA-LTF) Award: 5/2/19	\$ 7,531,910
6	FY20 operating and capital assistance	FY20 SCCRTC Transportation Development Act-State Transit Assistance (TDA-STA) Award: 5/2/19	\$ 4,530,969
End of Operating Projects			
Capital Projects			
7	1 CNG Replacement Bus	FY13-17 Caltrans Discretionary FTA 5339 Program Award: 4/4/2018	\$ 658,889
8	4 40' CNG replacement buses.	FTA FY17 5339(b) Bus and Bus Facilities Competitive Program Award: 2/8/2019	\$ 2,635,548
9	Vouchers for 4 ZEBs	CALSTART Heavy-duty zero-emission Vehicle Incentive Program (HVIP) for 4 ZEBs Application: 6/25/2019	\$ 600,000
10	Various FY19 Capital Improvments	FTA FY18 5339(a) Bus and Bus Facilities Formula Program Award: 7/9/2019	\$ 596,725

Attachment A

Santa Cruz METRO Active Grant as of 8/23/19

#	Project Description	Funding Source	\$ Budget Total Project
11	Charging Infrastructure	FY19 Low Carbon Transit Operations Program (LCTOP) Award: 6/28/19	\$ 646,496
12	Bus Mid-Life Overhauls (4)	FTA FY17 5339(a) Bus and Bus Facilities Formula Program Award: 7/9/2019	\$ 160,000
13	Fuel Management System	FTA FY17 5339(a) Bus and Bus Facilities Formula Program Award: 7/9/2019	\$ 180,000
14	Golf Club Fire Escape (Relates to Active Grants Fire Escape construction #17)	FTA FY17 5339(a) Bus and Bus Facilities Formula Program Award: 7/9/2019	\$ 97,523
15	Watsonville Mural	FY18 Arts Council of Santa Cruz Expiration: 12/31/18 (6/30/19 extension pending)	\$ 6,600
16	1 Electric Bus for Watsonville DAC	FY18 Low Carbon Transit Operations Program (LCTOP) Award: 6/30/18	\$ 1,013,202
17	2 ZEBs	CTC FY18 Local Partnership Program CTC FY19 STIP Allocation: 10/17/18	\$ 2,189,891
18	Refurbish 4 buses	CTC FY19 STIP Application: 10/17/17 Allocation: 10/17/18	\$ 1,316,493
19	Automatic Vehicle Locator	CTC FY19 STIP Application: 8/25/17 Award: 10/17/18	\$ 1,581,385
20	Comprehensive Security and Surveillance to purchase CCTV, lighting, generator replacement	FY17 Proposition 1B California Transit Security Program Expires: 6/15/2019	\$ 352,404
21	1 CNG Bus	SCCRTC FY17 Surface Transportation Block Grant program Expiration: 6/30/21	\$ 658,887
22	11 ParaCruz Vans	FTA FY15/FY16 5339(a) Bus and Bus Facilities Formula Program Complete	\$ 953,076

Attachment A

Santa Cruz METRO Active Grant as of 8/23/19

#	Project Description	Funding Source	\$ Budget Total Project
23	Facilities: Vernon x-planter	FTA FY15/FY16 5339(a) Bus and Bus Facilities Formula Program Complete	\$ 9,200
24	Facilities: WTC Landscape	FTA FY15/FY16 5339(a) Bus and Bus Facilities Formula Program Complete	\$ 30,000
25	Fleet fire escape. Construction support (Relates to Golf Club Fire Escape application #7)	FTA FY15/FY16 5339(a) Bus and Bus Facilities Formula Program	\$ 34,180
26	3 Electric replacement buses for Highway 17 Express	FTA FY16 5339(c) LoNo On hold	\$ 4,936,512
27	Comprehensive Security and Surveillance Camera on bus	FY16 CA Proposition 1B California Transit Security Program Expiration: 3/31/19.	\$ 440,505
28	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
29	Pacific Station Roof Construction	FY15 Public Transportation Modernization, Infrastructure and Service Enhancement Act (PTMISEA) Expiration: 6/30/22	\$ 350,000
30	One ParaCruz Expansion Van for Elderly/Disabled program beyond ADA requirements.	FY15 Caltrans FTA 5310 Elderly & Handicapped mobility program Complete	\$ 68,367
31	Propane Mule	FY14 FTA 5339a Formula Program Complete	\$ 60,000
32	Bus Mid-Life Overhaul, 7 @ \$39,513.70 ea.	FY14 FTA 5339a Formula Program Expires:6/30/19	\$ 276,596
33	Bucket truck	FY14 FTA 5339 Formula Program Complete	\$ 97,814

Attachment A

Santa Cruz METRO Active Grant as of 8/23/19

#	Project Description	Funding Source	\$ Budget Total Project
	Competitive Grant		
	Formula Grant		
34	Bus Repaint, 36 @ 3,628.10 ea.	FY14 FTA 5339 Formula Program Complete	\$ 131,834
35	Scissor Lift	FY14 FTA 5339 Formula Program Expiration: 6/30/19	\$ 17,548
36	MetroBase: Judy K. Souza Operations Facility construction	FY12 Proposition 1B State and Local Partnership Program (SLPP) California Transportation Commission Complete	\$ 11,624,000
37	MetroBase development, Judy K. Souza Operations Facility	FY10 - 13, FY15 Public Transportation Modernization, Infrastructure and Service Enhancement Act (PTMISEA) Complete	\$ 15,096,394
38	Pacific Station expansion and renovation architectural services	FY08 FTA 5309 CA-04-0102 Expires: 9/30/19	\$ 612,500
39	Pacific Station expansion and renovation architectural services	FY06 FTA 5309 CA-04-0021 Expires: 9/30/19	\$ 495,000
		Total	\$ 76,550,010
End of Active Grants			



DATE: August 23, 2019
TO: Board of Directors
FROM: Angela Aitken, Chief Financial Officer
**SUBJECT: ACCEPT AND FILE THE YEAR TO DATE MONTHLY FINANCIAL
REPORT AS OF MAY 31, 2019**

I. RECOMMENDED ACTION

**That the Board of Directors accept and file the Year to Date Monthly
Financial Report as of May 31, 2019**

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 May 31, 2019."
- 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 May 31, 2019. The fiscal year has elapsed 92%.

Slide 1

(Cover) Year to Date Monthly Financial Report as of May 31, 2019

Slide 2

FY19 Operating Revenue and Expenses for the Month Ending May 31, 2019

- Operating Revenues for the month are unfavorable by \$498K
- Operating Expenses
 - Labor Regular - favorable by \$41K
 - Labor OT - unfavorable by \$214K
 - Fringe Benefits – favorable by \$46K
 - Non-Personnel - unfavorable by \$63K

- Total Operating Expenses – unfavorable by \$189K
- Transfers – unfavorable by \$54K
- Operating Balance – unfavorable by \$741K

Slide 3

FY19 Operating Revenue and Expenses Year to Date as of May 31, 2019

- Operating Revenues Year to Date are favorable by \$2,374K
- Operating Expenses
 - Labor Regular - favorable by \$1,261K
 - Labor OT - unfavorable by \$1,526K
 - Fringe Benefits - favorable by \$1,044K
 - Non-Personnel - favorable by \$221K
- Total Operating Expenses – favorable by \$998K
- Transfers – favorable by \$207K
- Operating Balance – favorable by \$3,165K

Slide 4

FY19 Operating Revenue by Major Funding Source - Year to Date as of May 31, 2019

- Passenger Fares - actual is \$9,502K while budget is \$9,428K
- Sales Tax Revenue (including Measure D) - actual is \$23,675K while budget is \$22,451K
- Other Revenue - actual is \$841K while budget is \$489K
- Transp Dev Act (TDA) - actual is \$7,288K while budget is \$7,075K
- STA Op Assistance – actual is \$3,123K while budget is \$2,656K
- Federal Op Assistance - actual is \$218K while budget is \$174K.

Slide 5

Favorable/ (Unfavorable) Revenue Variance to Budget Year to Date as of May 31, 2019

- Passenger Fares variance to budget is favorable by \$74K primarily due to:
 - Special Transit Fares over budget (Contract payments from UCSC exceeding our budget projections).
 - Highway 17 Fares (due to a significant increase in the sales of monthly passes in April 2019)

- Sales Tax Revenue variance to budget is favorable by \$1,224K. Significant fluctuations in the variance to budget are expected in FY19 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 \$352K primarily due to Interest income and Other Op Assistance/Funding (funding received by UCSC for the Articulated Bus Project)
- Transp Dev Act (TDA) variance to budget is favorable by \$213K due to revenues above prior year's estimates from RTC.
- STA Op Assistance variance to budget is favorable by \$467K due to revised estimates by the State Controller's office that increased the total amount of the FY2018 -2019 STA funding to Santa Cruz County.
- Federal Op Assistance variance to budget is favorable by \$44K due to Medicare Subsidy.

Slide 6

FY19 Operating Expenses by Major Expense Category Year to Date as of May 31, 2019

- Labor – Regular - actual is \$14,483K while budget is \$15,744K
- Labor – OT - actual is \$3,089K while budget is \$1,563K
- Fringe Benefits - actual is \$18,518K (*of which \$4,867K is the Retirement Expense YTD*) while budget is \$19,562K
- Services - actual is \$3,442K while budget is \$3,449K
- Mobile Materials & Supplies - actual is \$2,741K while budget is \$3,056K
- Other Expenses - actual is \$2,446K while budget is \$2,344K.

Slide 7

Favorable/ (Unfavorable) Expense Variance to Budget Year to Date as of May 31, 2019

- Labor – Regular variance to budget is favorable by \$1,261K primarily due to:
 - Vacant funded positions
 - Extended unpaid leaves of absence
- Labor – OT variance to budget is unfavorable by \$1,526K due to vacant positions and extended leaves of absence in various departments.
- Fringe Benefits variance to budget is favorable by \$1,044K primarily due to lower retirement and medical insurance costs.
- Services variance to budget is favorable by \$7K primarily due to Prof & Tech Fees under budget.

- Mobile Materials & Supplies variance to budget is favorable by \$315K due to Fuel/Lube Rev Veh and Rev Veh Parts.
- Other Expenses variance to budget is unfavorable by \$102K primarily due to Settlement costs and Operating Lease Expense (offset by additional revenue from UCSC for the Articulated Bus Project).

Slide 8

FY19 Transfers Year to Date as of May 31, 2019

- Transfer to Capital Budget (2016 Net Sales Tax Measure D) - actual is \$1,912K while budget is \$1,705K.
- Transfer to Capital Budget (2016 Net Sales Tax Measure D) variance to budget is favorable by \$207K.

Slide 9

FY19 Capital Budget Spending Year to Date (by Funding Source) as of May 31, 2019

- Total Capital Spending year to date is \$3,079K; FY19 budget is \$22.8M
 - Cal-OES Prop 1B Transits Security Grant spending (CTSGP) is \$412K
 - Operating and Capital Reserve spending is \$94K
 - Federal Capital Grants (FTA) spending is \$1,182K
 - Measure D spending is \$767K
 - State Transit Assistance (STA –SB-1-FY18) spending is \$12K
 - State Transportation Improvement Plan (STIP) spending is \$528K
 - State – PTMISEA (1B) spending is \$84K.

Slide10

FY19 Capital Budget Spending Year to Date as of May 31, 2019

- Total Capital Projects spending year to date is \$3,079K; FY19 budget is \$22.8M
 - Construction Related Projects spending is \$493K for the following projects:
 - Pacific Station/Metro Center – Conceptual Design
 - Metrobase Project – Judy K. Souza – Operations Bldg.
 - Transit Security Projects
 - IT Projects spending is \$9K for the following project:
 - Large Monitor Presentation System
 - Facilities Upgrades & Improvements spending is \$10K for the following project:

- 138 Golf Club Fire Egress (FTA 5339a FY17)
- Revenue Vehicle Purchases, Replacement & Campaigns spending is \$2,411K for the following projects:
 - Electric Bus (3), Infrastructure and Project Management (FTA 5339c FY16)
 - AVL/ITS (FY18 STIP, Measure D)
 - VTA Bus Transfer - Decommission & Retrofit 10 Electric Hybrids, and 4 Diesel Artics
 - 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)
- Office Equipment spending is \$32K for the following project:
 - Business Copy Machine – Admin (FTA 5339a FY18)
 - 4 Vertical Fire King File Cabinets (Admin)
- Misc. spending is \$70K for the following project:
 - TVM Pin Pad Bezel 8 Upgrade (6)
 - C/S Call Center Furnishings (FTA 5339a FY18)
 - XPR7550 Handheld Radios (3) & Batteries (7)

Slide 11

(Cover Sheet) - Additional Information

Slide 12

Economic Indicators & Ridership for the Month of May 2019

- Unemployment Rate % in Santa Cruz County is 3.9%
- \$ Gasoline per Gallon for the San Francisco-Oakland-San Jose area is \$4.05;
\$ Diesel is \$4.13
- Ridership YTD as of May 2019 changed as follows, year-over-year (FY18 – FY19):
 - 0.1% decrease in Total ridership

- 1.7% decrease in Highway 17 ridership
- No change in Local ridership
- 2.9% increase in UCSC ridership
- 4.3% increase in Cabrillo ridership
- 4.5% decrease in Non-Student ridership.

Slide 13

FY19 Operating Revenue, Expenses, and Transfers Year to Date as of June 30, 2019: Preliminary (reflects Actual Data for FY19 Quarters 1, 2, and 3 and Projections for the 4th Quarter)

- Revenue – favorable by \$2,132K
- Operating Expenses:
 - Personnel Expenses - favorable by \$878K
 - Non-Personnel - favorable by \$238K
- Total Operating Expenses - favorable by \$1,116K
- Transfers –favorable by \$3,248K
- Operating Balance – No variance to budget.

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 May 31, 2019.

V. ALTERNATIVES CONSIDERED

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

VI. ATTACHMENTS

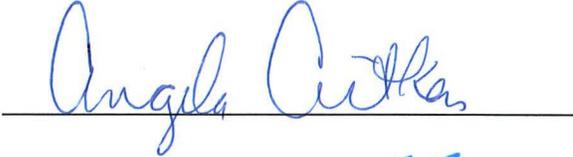
Attachment A: Year to Date Monthly Financial Report as of May 31, 2019 Presentation

Attachment B: FY19 Capital Budget Project Status Report as of May 31, 2019

Prepared by: Kristina Mihaylova, Sr. Financial Analyst

VII. APPROVALS:

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



Alex Clifford, CEO/General Manager



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Year to Date Monthly Financial Report as of May 31, 2019

9-07A.1

Santa Cruz METRO Board of Directors

August 23, 2019

Angela Aitken, Chief Financial Officer

FY19 Operating Revenue and Expenses

For the Month Ending May 31, 2019

92% of Fiscal Year Elapsed

\$ In Thousands	Actual	Budget	Budget to Actual Favorable/ (Unfavorable)
Operating Revenue:	\$5,435	\$5,933	(\$498)
Operating Expenses:			
Labor - Regular	\$1,390	\$1,431	\$41
Labor - Overtime	\$356	\$142	(\$214)
Fringe Benefits	\$1,732	\$1,778	\$46
Non-Personnel Expenses	\$905	\$842	(\$63)
Total Operating Expenses:	\$4,382	\$4,193	(\$189)
Transfers:	(\$101)	(\$155)	(\$54)
Operating Balance:			(\$741)

9-07A.2



FY19 Operating Revenue and Expenses

Year to Date as of May 31, 2019

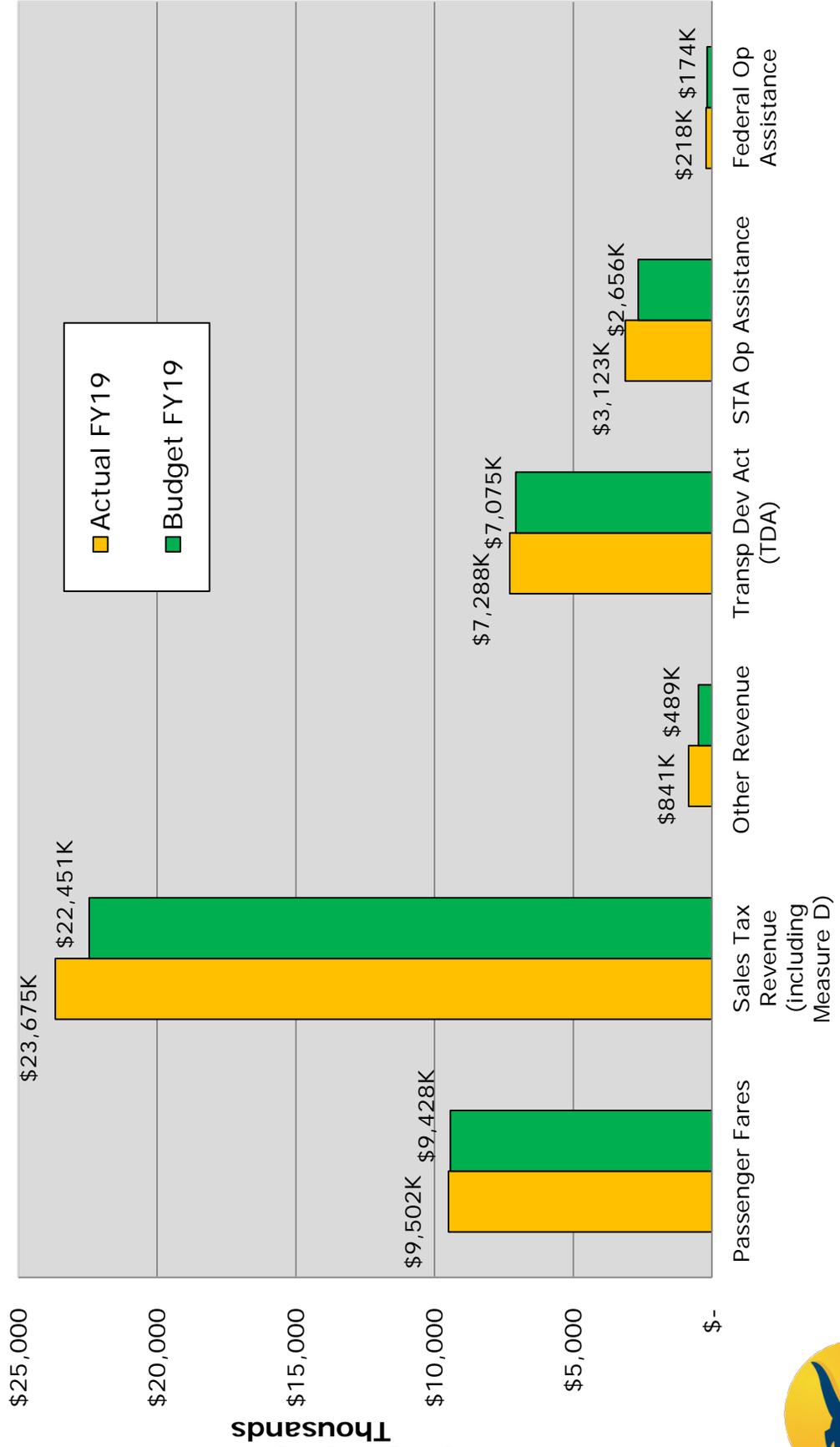
92% of Fiscal Year Elapsed

\$ In Thousands	Actual	Budget	Budget to Actual Favorable/ (Unfavorable)
Operating Revenue:	\$44,647	\$42,273	\$2,374
Operating Expenses:			
Labor - Regular	\$14,483	\$15,744	\$1,261
Labor - Overtime	\$3,089	\$1,563	(\$1,526)
Fringe Benefits	\$18,518	\$19,562	\$1,044
Non-Personnel Expenses	\$8,628	\$8,849	\$221
Total Operating Expenses:	\$44,719	\$45,717	\$998
Transfers:	(\$1,912)	(\$1,705)	\$207
Operating Balance:			\$3,165

9-07A.3



FY19 Operating Revenue by Major Funding Source
Year to Date as of May 31, 2019
 92% of Fiscal Year Elapsed

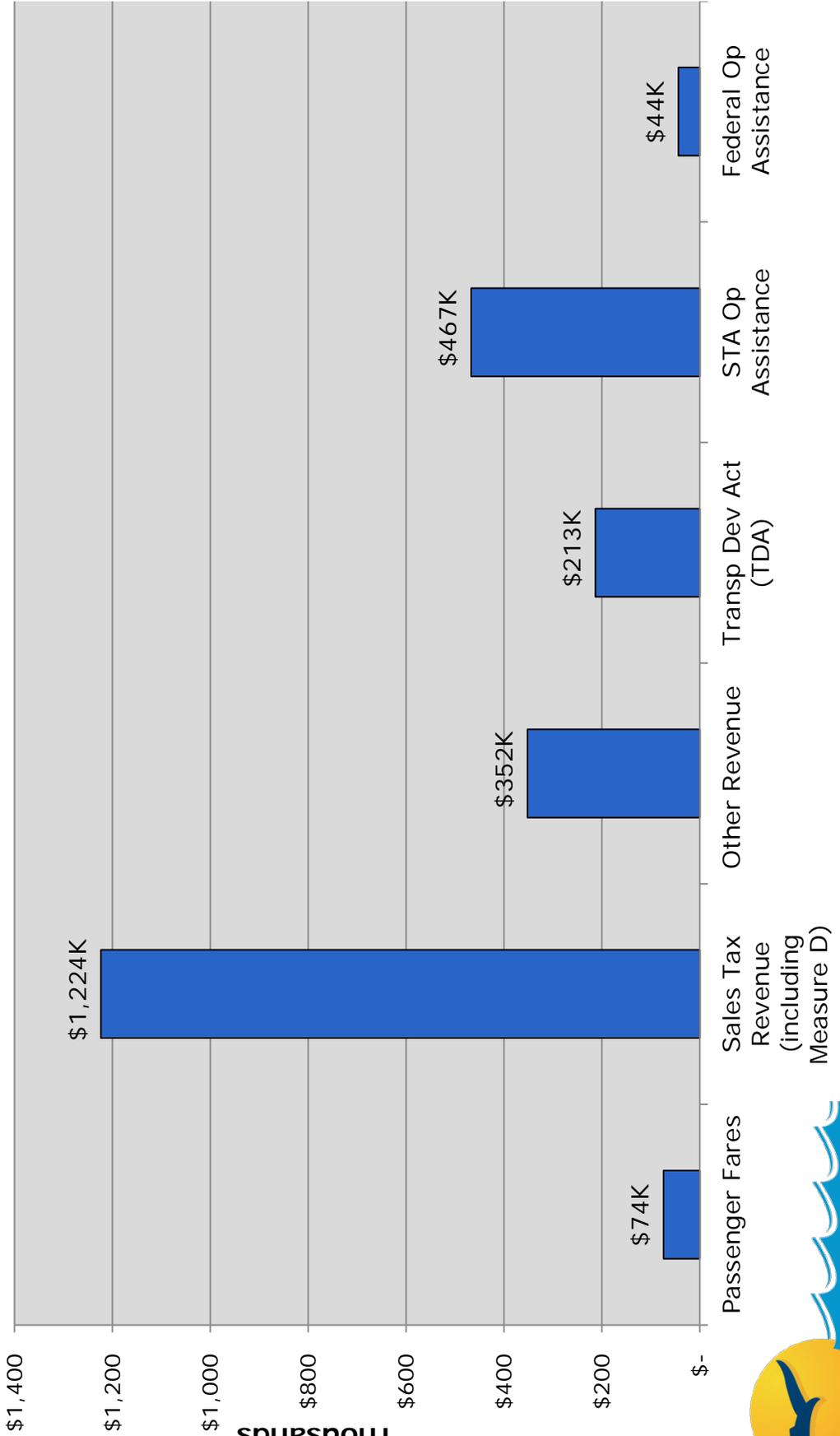


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Favorable/(Unfavorable) Revenue Variance to Budget Year to Date as of May 31, 2019

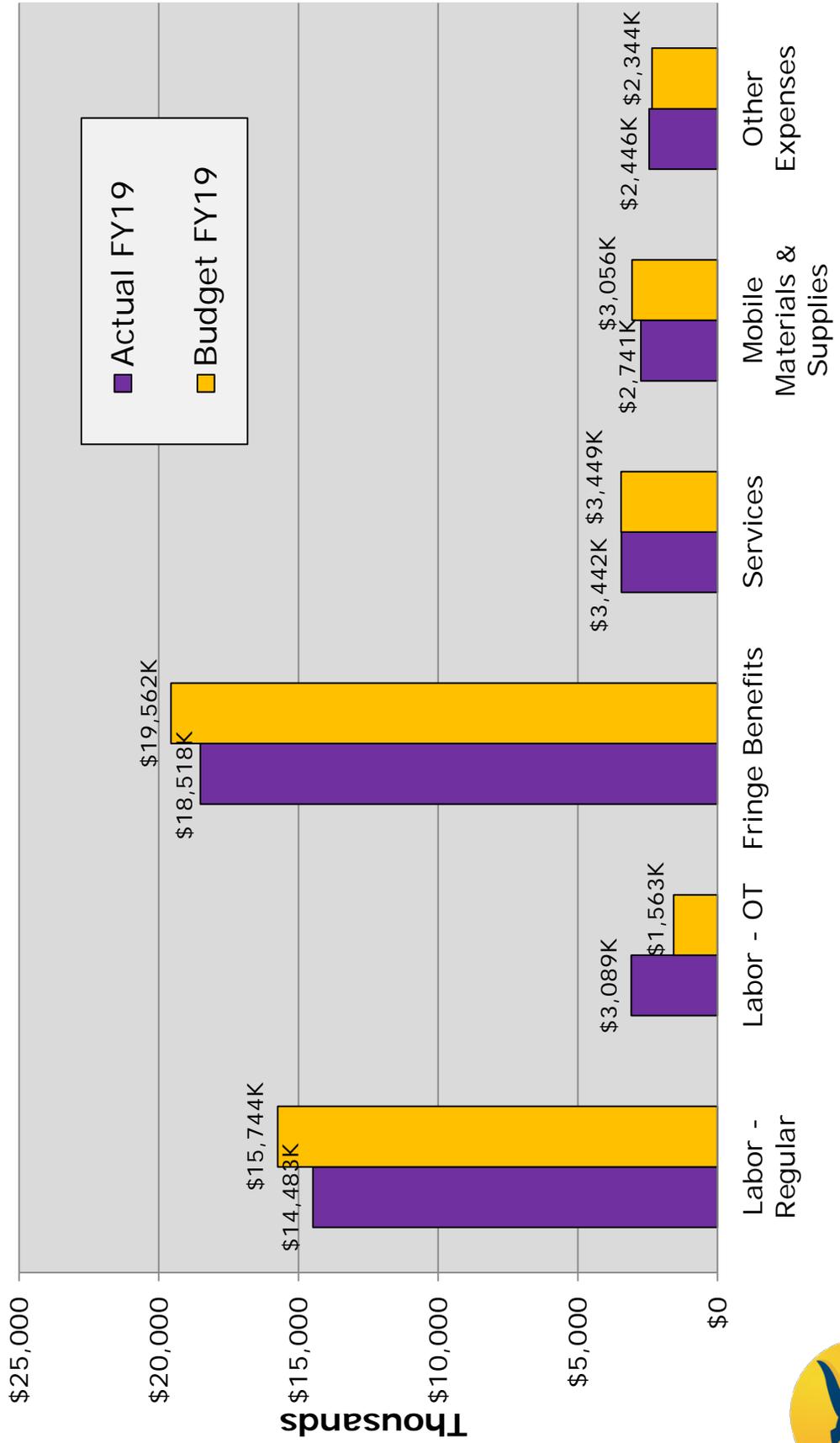
92% of Fiscal Year Elapsed



9-07A.5



FY19 Operating Expenses by Major Expense Category
Year to Date as of May 31, 2019
92% of Fiscal Year Elapsed

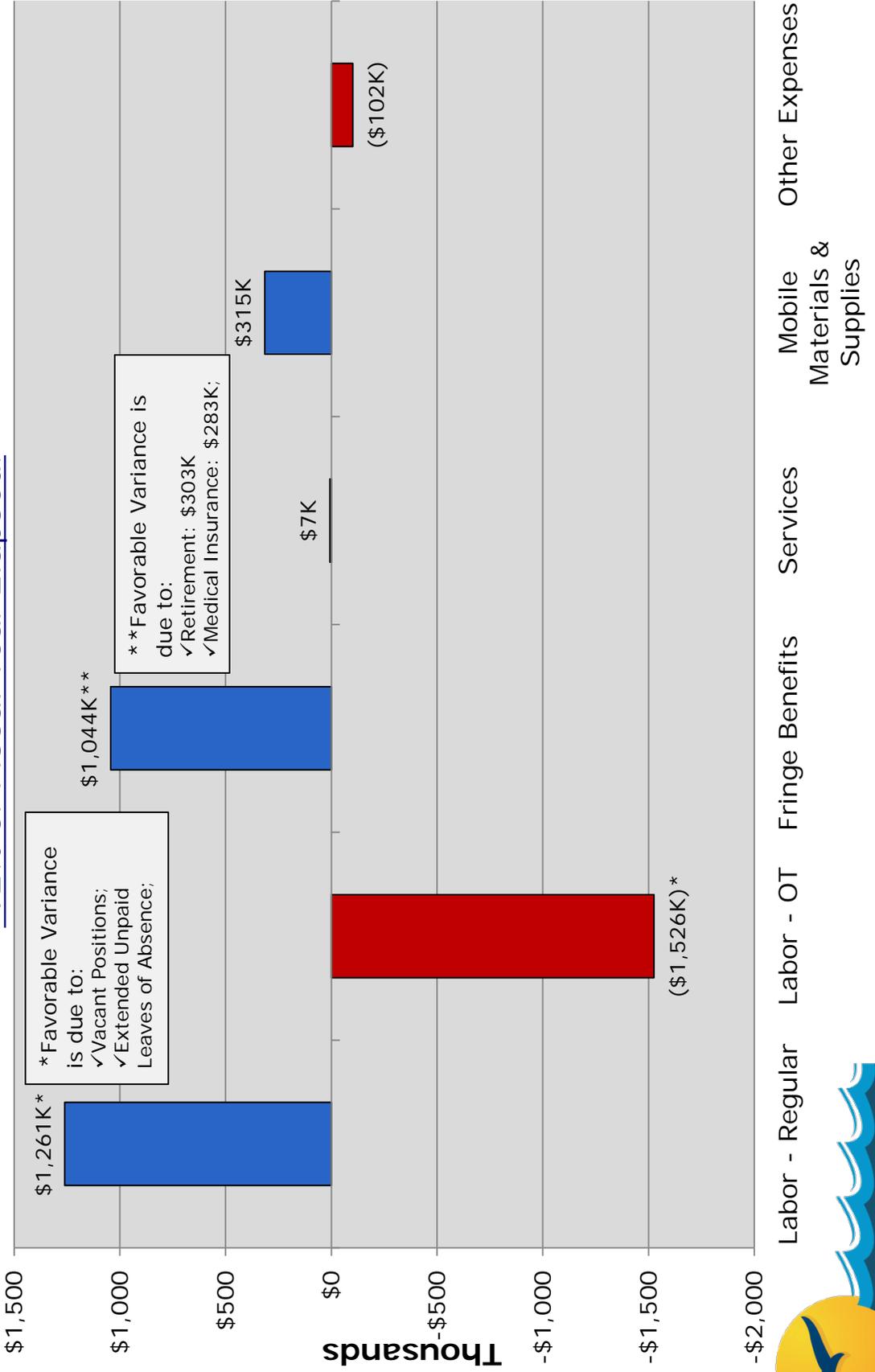


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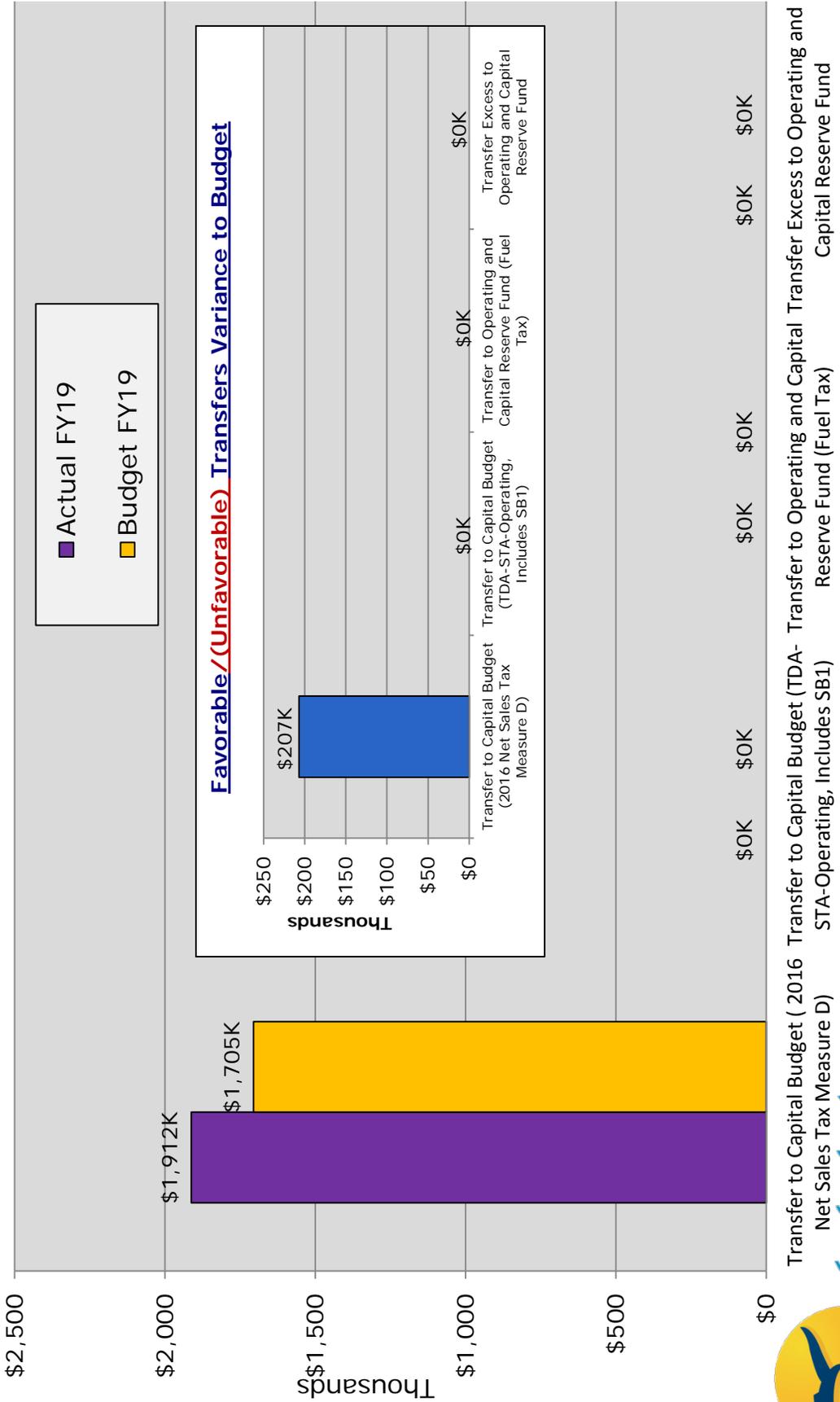


Favorable/(Unfavorable) Expense Variance to Budget Year to Date as of May 31, 2019

92% of Fiscal Year Elapsed:



FY19 Transfers
Year to Date as of May 31, 2019
92% of Fiscal Year Elapsed

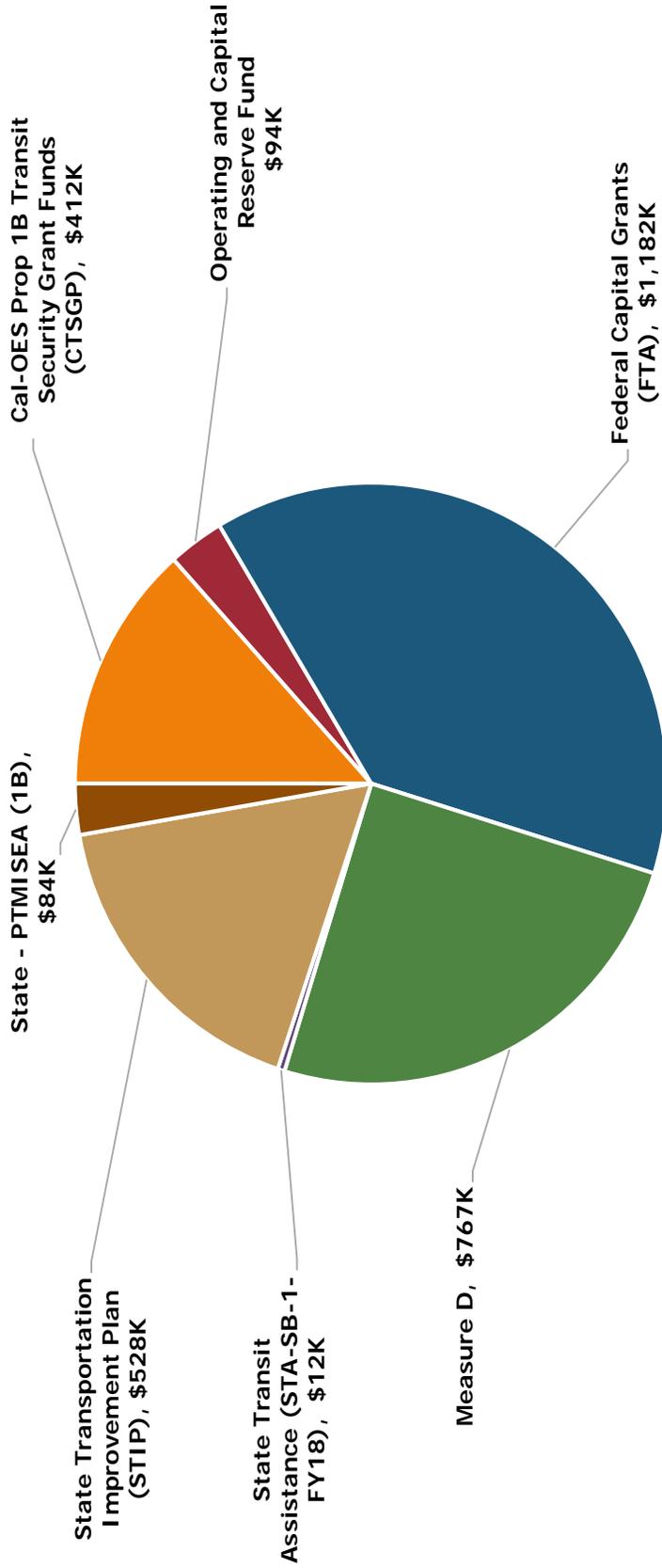


9-07A.8

FY19 Capital Budget:

Spending Year to Date (by Funding Source) as of May 31, 2019
 92% of Fiscal Year Elapsed

	Actual YTD	Total FY19 Budget	% Spent YTD
Total Capital Funding:	\$3,079,234	\$22,803,876	14%



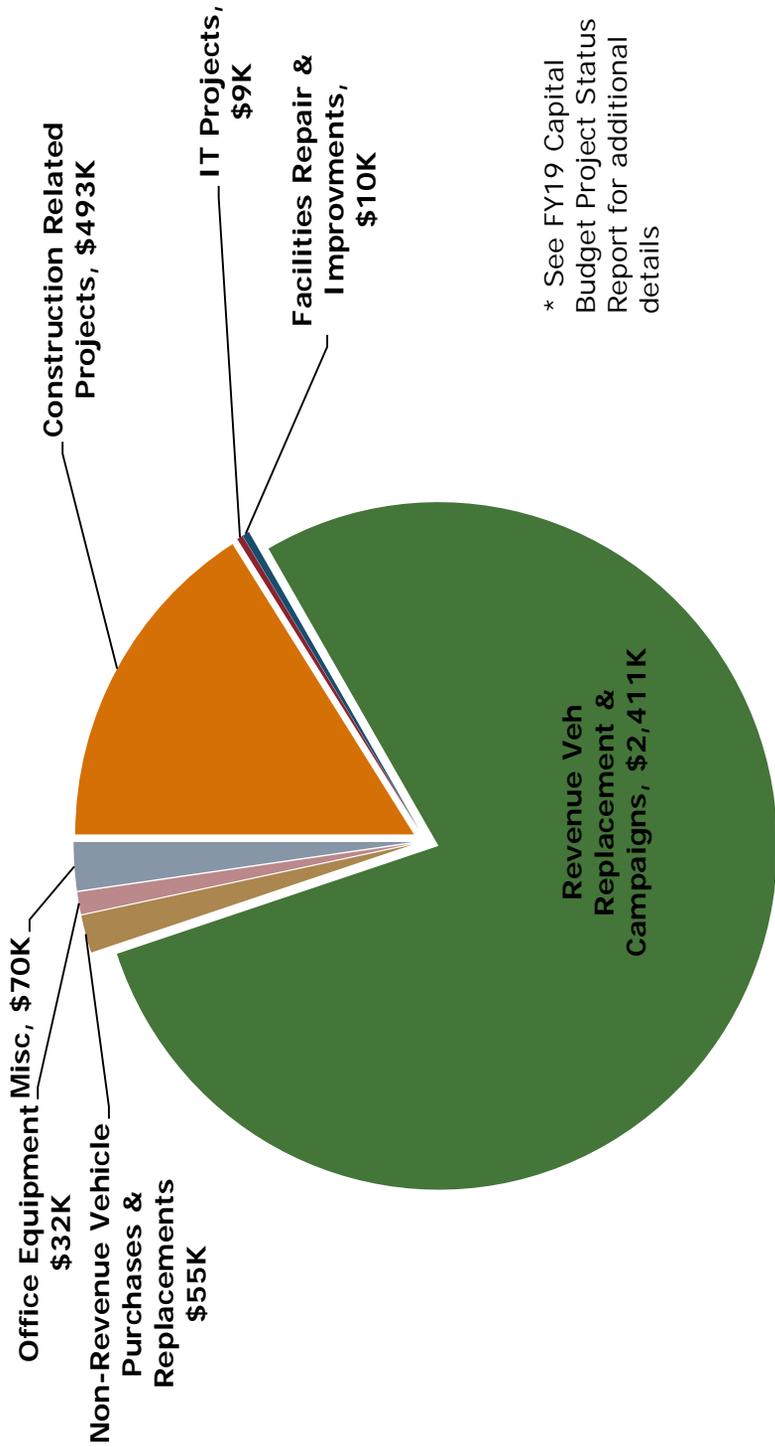
Actual YTD

FY19 Capital Budget:

Spending Year to Date as of May 31, 2019

92% of Fiscal Year Elapsed

	Actual YTD	Total FY19 Budget	% Spent YTD
Total Capital Projects:	\$3,079,234	\$22,803,876	14%



* See FY19 Capital Budget Project Status Report for additional details

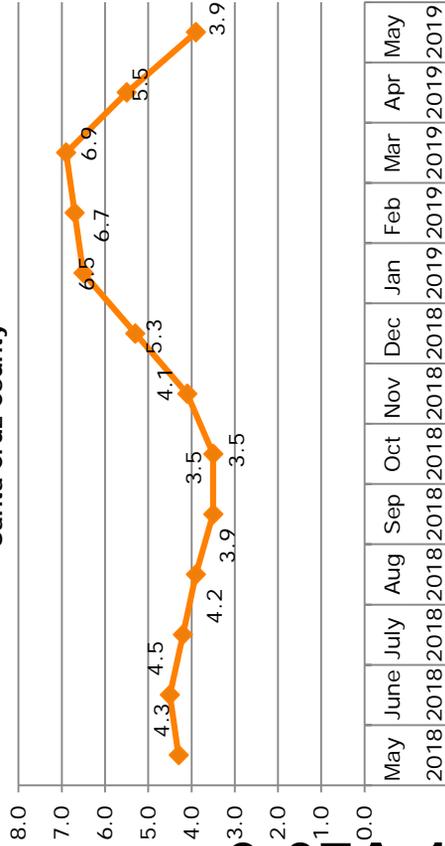
Additional Information

9-07A.11

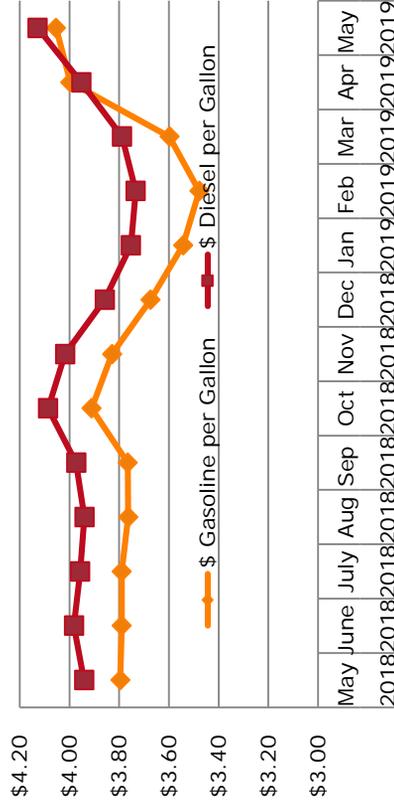


Economic Indicators & Ridership:

Unemployment Rate %
Santa Cruz County



\$ Diesel/Gasoline per Gallon
San Francisco – Oakland – San Jose



FY18-19 Ridership: May YTD			
Ridership	May-FY18	May-FY19	% Change
Total	5,048,512	5,045,751	-0.1%
Hwy 17	290,419	285,401	-1.7%
Local	4,758,093	4,760,350	-0.0%
UCSC	2,592,054	2,666,024	2.9%
Cabrillo	296,571	309,248	4.3%
Non-Student	1,869,468	1,785,078	-4.5%



FY19 Operating Revenue, Expenses, and Transfers:

Year to Date as of June 30, 2019: PRELIMINARY*:

100% of Fiscal Year Elapsed

\$ In Thousands	Actual	Budget	Budget to Actual Favorable/ (Unfavorable)
Revenue:	\$55,863	\$53,731	\$2,132
Operating Expenses:			
Personnel Expenses	\$39,342	\$40,220	\$878
Non-Personnel Expenses	\$9,394	\$9,632	\$238
Total Operating Expenses:	\$48,736	\$49,852	\$1,116
Transfers:			
Transfers to Capital Budget	\$2,328	\$2,328	\$0
Transfers to Operating and Capital Reserve Fund	\$4,655	\$1,407	\$3,248
Total Transfers:	\$6,983	\$3,736	\$3,248
Operating Balance:	\$143	\$143	\$0

*Reflects Actual Data for Qtrs. 1, 2 & 3 of FY19 and Projections for Qtr. 4.



Questions

9-07A.14



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DATE: August 23, 2019
TO: Board of Directors
FROM: Wondimu Mengistu, Grants/Legislative Analyst
SUBJECT: CONSIDER A RESOLUTION DESIGNATING THE CEO AS THE AUTHORIZED AGENT TO SUBMIT A PROJECT LIST AND EXECUTE AGREEMENTS TO RECEIVE CALIFORNIA STATE OF GOOD REPAIR FUNDS

I. RECOMMENDED ACTION

That the Board of Directors adopt a resolution designating the CEO as the Authorized Agent to submit a project list and to execute all agreements necessary to receive funds from the California State of Good Repair program

II. SUMMARY

- The California Road Repair and Accountability Act of 2017 (SB 1) created a State of Good Repair (SGR) formula program for transit capital improvement projects.
- The State Controller's Office (SCO) apportions SGR funds to the Santa Cruz County Regional Transportation Commission (RTC) and the Santa Cruz Metropolitan Transit District (METRO) according to the formula established for apportionment of State Transit Assistance (STA) funds.
- For FY20, the SCO apportioned \$687,360 to Santa Cruz County, \$374,249 to RTC and \$313,111 to METRO.
- The RTC can sub-allocate its apportionment to METRO as currently shown in RTC's amended FY20 Budget.
- METRO has committed its entire apportionment of FY20 SGR funds as well as 85% (\$318,112) of RTC's apportionment of FY20 SGR funds for bus replacements and/or for the required local match for competitive grant opportunities.
- METRO will request that the RTC transfer its 85% of population-based SGR revenue to METRO quarterly when paid by the SCO, just as RTC currently does with STA funds.
- Staff recommends that the Board of Directors (Board) adopt a resolution designating the CEO as the Authorized Agent to submit an application and to execute all agreements and take all other actions, including executing the Certifications and Assurances, necessary to receive the SGR funds; and request the RTC transfer METRO's entire SGR apportionment as well as its

85% of population-based SGR revenue to METRO for transit capital improvements.

III. DISCUSSION/BACKGROUND

On April 28, 2017, Governor Brown signed SB 1, creating new taxes and fees to fund \$50 billion in transportation improvements across all transportation modes throughout the State of California. SB 1 established a new Transportation Improvement Fee on vehicle registrations to fund a new SGR transit capital improvement program. SGR funds are apportioned to counties statewide according to the existing formula in the STA program, which distributes 50% of the revenue to Regional Transportation Planning Agencies based upon county population (the §99313 share) and 50% to transit operators based upon their proportionate share of statewide transit revenue from fares and local taxes (the §99314 share).

The SCO apportions funds to eligible entities throughout the state based upon the revenue it anticipates collecting throughout the year from the Transportation Improvement Fee. For FY20, the SCO apportioned \$687,360 to Santa Cruz County, \$374,249 for the §99313 share to RTC and \$313,111 to METRO for the §99314 share. Both shares, however, are disbursed directly to the RTC, which is responsible for sub-allocating the §99314 SGR funds to METRO and for paying the §99313 SGR funds to METRO or to any other transit operator in the county.

METRO has already committed its entire anticipated FY20 apportionment, as well as 85% of RTC's FY20 SGR funds for bus replacement projects and/or for the required local match for competitive grant opportunities. METRO's highest capital improvement priority is to replace buses that have exceeded their useful lifespan. In FY18, a new METRO capital budget funding strategy was introduced that would result in an estimated \$3M per year to be dedicated to the annual capital budget. The strategy of creating a "Bus Replacement Fund" establishes consistent annual transfers of SGR, STA-SB1 funds and Measure D funds to the capital budget to provide stable funding to purchase and/or provide required local match for fixed-route buses that have exceeded their useful life. METRO plans to use all of its FY20 SGR funds (\$313,111) as well as 85% (\$318,112) of RTC's FY20 SGR funds for bus replacements and/or for the required local match for competitive grant opportunities.

Staff recommends that the Board of Directors adopt a resolution (Attachment A) to:

1. Designate the CEO as the Authorized Agent to submit a project list to Caltrans and to execute all documents and take all further actions necessary to receive FY20 SGR funds (Attachment B).

2. Authorize the CEO to execute the Certifications and Assurances, necessary to receive the SGR funds (Attachment C).
3. Authorize the CEO to request that the RTC sub-allocate 85% of its §99313 population-based share of SGR funds to METRO and identify METRO's bus replacements and/or the required local match for competitive grant opportunities in its project list to Caltrans (Attachment D).

IV. FINANCIAL CONSIDERATIONS/IMPACT

METRO would receive \$631,223 from Santa Cruz County's FY20 SGR apportionment to use for bus replacement projects and/or for the required local match for competitive grant opportunities. If METRO chooses not to use the funds to purchase or lease CNG replacement buses, METRO will reprogram the SGR funds as matching funds required for competitive grant opportunities.

The RTC would pay SGR funds to METRO quarterly as RTC receives them from the SCO. METRO must retain the SGR funds and interest earnings in a separate account until spent.

V. ALTERNATIVES CONSIDERED

There are no alternatives. METRO has already committed the anticipated SGR funds for bus replacements.

VI. ATTACHMENTS

- Attachment A:** Authorizing Resolution
Attachment B: Authorized Agent Form
Attachment C: Certifications and Assurances
Attachment D: Letter to SCCRTC requesting transfer of SGR funds to METRO

Prepared by: Wondimu Mengistu, Grants/Legislative Analyst

VII. APPROVALS:

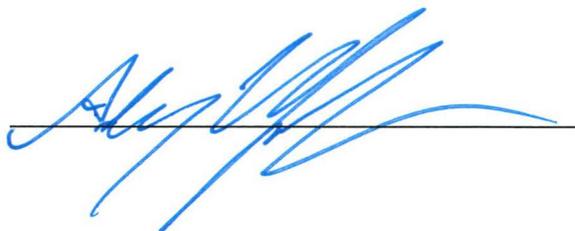
Barrow Emerson, Planning
and Development Director



Approved as to fiscal impact:
Angela Aitken, CFO



Alex Clifford, CEO/General Manager



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:

RESOLUTION OF THE BOARD OF DIRECTORS OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT AUTHORIZING THE EXECUTION OF CERTIFICATIONS AND ASSURANCES AND DESIGNATING ALEX CLIFFORD, CEO/GENERAL MANAGER, AS THE AUTHORIZED AGENT TO EXECUTE ALL ACTIONS NECESSARY TO RECEIVE FUNDS FROM THE STATE OF GOOD REPAIR PROGRAM

WHEREAS, California Governor Brown enacted the Road Repair and Accountability Act of 2017 (SB 1) on 4/28/2017 to provide \$50 billion for transportation investments throughout the State of California during the next decade; and

WHEREAS, SB 1 established the State of Good Repair program (SGR) funded by a Transportation Improvement Fee on motor vehicle registrations beginning 1/1/2018 for transit system capital improvements; and

WHEREAS, SB 1 delegated SGR implementation to the California Department of Transportation (Caltrans) and specified that the State Controller's Office apportion SGR funds to the Regional Transportation Planning Agencies and to the eligible transit operators by the same formula used to distribute State Transit Assistance funds; and

WHEREAS, the Santa Cruz Metropolitan Transit District is an eligible transit operator and will receive its SGR funds from the Santa Cruz County Regional Transportation Commission, to which the SCO disburses all of the SGR revenue for Santa Cruz County; and

WHEREAS, METRO proposes to receive Santa Cruz County's entire population and revenue-based SGR apportionments from the Santa Cruz County Regional Transportation for transit capital improvement projects; and

WHEREAS, the Santa Cruz Metropolitan Transit District authorizes submittal of the following project list to Caltrans for the FY20 SGR funds:

Attachment A

Resolution No. _____

Page 3

Project Name: Bus replacements
Total SGR Funds Requested \$631,223
RTC FY20 apportionment: \$318,112
METRO FY20 apportionment: \$313,111

Short Description: Use FY20 SGR funds to replace buses that have exceeded their useful lifespan.

Contributing Sponsor: Santa Cruz County Regional Transportation

-OR-

Project Name: For the required local match for competitive grant opportunities
Total SGR Funds Requested \$631,223
RTC FY20 apportionment: \$318,112
METRO FY20 apportionment: \$313,111

Short Description: Use FY20 SGR funds for the required local match for competitive grant opportunities.

Contributing Sponsor: Santa Cruz County Regional Transportation

NOW, THEREFORE, BE IT RESOLVED, that the Board of Directors of the Santa Cruz Metropolitan Transit District hereby agrees to comply with all conditions and requirements set forth in the Certification and Assurances document and in the applicable statutes, regulations and guidelines for the SGR; and

THEREFORE, BE IT FURTHER RESOLVED, that the Board of Directors of the Santa Cruz Metropolitan Transit District hereby authorizes Alex Clifford, CEO/General Manager, to establish an agreement with the Santa Cruz County Regional Transportation Commission to transfer the County's population-based apportionment of FY20 State of Good Repair funds to the Santa Cruz Metropolitan Transit District to use the funds for bus replacements and/or to pay the local match for competitive grant opportunities to buy CNG replacement buses; and

THEREFORE, BE IT FURTHER RESOLVED, that the Board of Directors of the Santa Cruz Metropolitan Transit District hereby designates Alex Clifford, CEO/General Manager, or his designee, as the Authorized Agent to execute all actions necessary to receive funds from the SGR.

PASSED AND ADOPTED this 23rd Day of August 2019 by the following vote:

AYES: Directors -

NOES: Directors -

ABSTAIN: Directors -

9-08A.2

Attachment A

Resolution No. _____
Page 4

ABSENT: Directors -

APPROVED _____
ED BOTTORFF
Board Chair

ATTEST _____
ALEX CLIFFORD
CEO/General Manager

APPROVED AS TO FORM:

JULIE SHERMAN
General Counsel

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Attachment B

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION
Division of Rail and Mass Transportation
State Transit Assistance State of Good Repair Program
Authorized Agent Form



Authorized Agent

The following individual(s) are hereby authorized to execute for and on behalf of the named Regional Entity/Transit Operator, and to take any actions necessary for the purpose of obtaining State Transit Assistance State of Good Repair funds provided by the California Department of Transportation, Division of Rail and Mass Transportation. This form is valid at the beginning of Fiscal Year 2019-2020 until the end of the State of Good Repair Program. If there is a change in the authorized agent, the project sponsor must submit a new form. This form is required even when the authorized agent is the executive authority himself.

Alex Clifford, CEO/General Manager OR
(Name and Title of Authorized Agent)

(Name and Title of Authorized Agent) OR

(Name and Title of Authorized Agent)

AS THE CEO/General Manager
(Chief Executive Officer / Director / President / Secretary)

OF THE Santa Cruz Metropolitan Transit District
(Name of County/City Organization)

Alex Clifford
(Print Name)

CEO/General Manager
(Title)

(Signature)

Approved this 23rd day of August, 2019

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State Transit Assistance State of Good Repair Program

Recipient Certifications and Assurances

Recipient: Santa Cruz Metropolitan Transit District.

Effective Date: August 23, 2019.

In order to receive State of Good Repair Program (SGR) funds from the California Department of Transportation (Department), recipients must agree to following terms and conditions:

A. General

- (1) The recipient agrees to abide by the State of Good Repair Guidelines as may be updated from time to time.
- (2) The potential recipient must submit to the Department a State of Good Repair Program Project List annually, listing all projects proposed to be funded by the SGR program. The project list should include the estimated SGR share assigned to each project along with the total estimated cost of each project..
- (3) The recipient must submit a signed Authorized Agent form designating the representative who can submit documents on behalf of the recipient and a copy of the board resolution authorizing the agent.

B. Project Administration

- (1) The recipient certifies that required environmental documentation will be completed prior to expending SGR funds. The recipient assures that each project approved for SGR funding comply with Public Resources Code § 21100 and § 21150.
- (2) The recipient certifies that SGR funds will be used for transit purposes and SGR funded projects will be completed and remain in operation for the estimated useful lives of the assets or improvements.
- (3) The recipient certifies that it has the legal, financial, and technical capacity to deliver the projects, including the safety and security aspects of each project.

Attachment C

- (4) The recipient certifies that there is no pending litigation, dispute, or negative audit findings related to any SGR project at the time an SGR project is submitted in the annual list.
- (5) Recipient agrees to notify the Department immediately if litigation is filed or disputes arise after submission of the annual project list and to notify the Department of any negative audit findings related to any project using SGR funds.
- (6) The recipient must maintain satisfactory continuing control over the use of project equipment and/or facilities and will adequately maintain project equipment and/or facilities for the estimated useful life of each project.
- (7) Any and all interest the recipient earns on SGR funds must be reported to the Department and may only be used on approved SGR projects or returned to the Department.
- (8) The recipient must notify the Department of any proposed changes to an approved project list by submitting an amended project list.
- (9) Funds will be expended in a timely manner.

C. Reporting

- (1) Per Public Utilities Code § 99312.1 (e) and (f), the recipient must submit the following SGR reports:
 - a. Annual Expenditure Reports within six months of the close of the fiscal year (by December 31st) of each year.
 - b. The annual audit required under the Transportation Development Act (TDA), to verify receipt and appropriate expenditure of SGR funds. A copy of the audit report must be submitted to the Department within six months of the close of each fiscal year in which SGR funds have been received or expended.

D. Cost Principles

- (1) The recipient agrees to comply with Title 2 of the Code of Federal Regulations Part 200, Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments.
- (2) The recipient agrees, and will assure that its contractors and subcontractors will be obligated to agree, that (a) Contract Cost Principles and Procedures, 48 CFR, Federal Acquisition Regulations System, Chapter 1, Part 31, et seq., shall be used to

Attachment C

determine the allowability of individual project cost items and (b) those parties shall comply with Federal administrative procedures in accordance with 2 CFR, Part 200, Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments.

- (3) Any project cost for which the recipient has received payment that are determined by subsequent audit to be unallowable under 2 CFR, Part 200, are subject to repayment by the recipient to the State of California (State). Should the recipient fail to reimburse moneys due to the State within thirty (30) days of demand, or within such other period as may be agreed in writing between the Parties hereto, the State is authorized to intercept and withhold future payments due the recipient from the State or any third-party source, including but not limited to, the State Treasurer and the State Controller.

E. Record Retention

- (1) The recipient agrees, and will assure that its contractors and subcontractors shall establish and maintain an accounting system and records that properly accumulate and segregate incurred project costs and matching funds by line item for the project. The accounting system of the recipient, its contractors and all subcontractors shall conform to Generally Accepted Accounting Principles (GAAP), enable the determination of incurred costs at interim points of completion, and provide support for reimbursement payment vouchers or invoices. All accounting records and other supporting papers of the recipient, its contractors and subcontractors connected with SGR funding shall be maintained for a minimum of three (3) years from the date of final payment and shall be held open to inspection, copying, and audit by representatives of the State and the California State Auditor. Copies thereof will be furnished by the recipient, its contractors, and subcontractors upon receipt of any request made by the State or its agents. In conducting an audit of the costs claimed, the State will rely to the maximum extent possible on any prior audit of the recipient pursuant to the provisions of federal and State law. In the absence of such an audit, any acceptable audit work performed by the recipient's external and internal auditors may be relied upon and used by the State when planning and conducting additional audits.
- (2) For the purpose of determining compliance with Title 21, California Code of Regulations, Section 2500 et seq., when applicable, and other matters connected with the performance of the recipient's contracts with third parties pursuant to Government Code § 8546.7, the recipient, its contractors and subcontractors and the Department shall each maintain and make available for inspection all books, documents, papers, accounting records, and other evidence pertaining to the performance of such contracts, including, but not limited to, the costs of administering those various contracts. All of the above referenced parties shall make such materials available at their respective offices at all reasonable times during the entire project period and for three (3) years from the date of final payment. The

Attachment C

Santa Cruz Metropolitan Transit District

Page 4

State, the California State Auditor, or any duly authorized representative of the State, shall each have access to any books, records, and documents that are pertinent to a project for audits, examinations, excerpts, and transactions, and the recipient shall furnish copies thereof if requested.

- (3) The recipient, its contractors and subcontractors will permit access to all records of employment, employment advertisements, employment application forms, and other pertinent data and records by the State Fair Employment Practices and Housing Commission, or any other agency of the State of California designated by the State, for the purpose of any investigation to ascertain compliance with this document.

F. Special Situations

- (1) Recipient acknowledges that if a project list is not submitted timely, the recipient forfeits its apportionment for that fiscal year.
- (2) Recipients with delinquent expenditure reports may risk future eligibility for future SGR funding.
- (3) Recipient acknowledges that the Department shall have the right to perform an audit and/or request detailed project information of the recipient's SGR funded projects at the Department's discretion from SGR award through 3 years after the completion and final billing of any SGR funded project.. Recipient agrees to provide any requested project information.

I certify all of these conditions will be met.

Santa Cruz Metropolitan Transit District

BY: _____

Alex Clifford, CEO/General Manager

9-08C.4

Attachment D

Santa Cruz Metropolitan Transit District



August 23, 2019

Mr. Guy Preston, Executive Director
Santa Cruz County Regional Transportation Commission
1523 Pacific Avenue
Santa Cruz, CA 95060

RE: Request for SCCRTC to Sponsor METRO's FY20 STA State of Good Project

Dear Mr. Preston:

The Santa Cruz Metropolitan Transit District (METRO) requests that the Santa Cruz County Regional Transportation Commission (RTC) delegate its FY20 allocation of State Transit Assistance, State of Good Repair (SGR) funds to METRO for a public transit project to buy new CNG replacement buses or use as matching funds for competitive grant opportunities. METRO currently has programmed the SGR funds for bus replacements; however, if the METRO chooses not use the funds to purchase or lease fewer CNG replacement buses, METRO will reprogram the SGR funds as matching funds required for competitive grant opportunities. The SGR guidelines allow a recipient to contribute its apportionment to a sub-recipient.

The State Controller's Office allocated FY20 SGR funds to regional transportation planning agencies and transit operators using the same distribution formula specified for STA funds under Public Utilities Code 99313 and 99314 (§99313 and §99314). Accordingly, the RTC will receive \$374,249 and METRO will receive \$313,111 in FY20 SGR funds. METRO has already committed its entire anticipated FY20 apportionment as well as 85% of RTC's FY20 SGR funds for bus replacements projects and/or for the required local match for competitive grant opportunities. If the RTC concurs, it will submit METRO's project list for 85% of its §99313 apportionment, and METRO will submit the same project list to Caltrans for its §99314 allocation. METRO will use all of its FY20 SGR funds (\$313,111) as well as 85% (\$318,112) of RTC's FY20 SGR funds for the project(s) described above.

The METRO Board of Directors will consider a resolution authorizing this project at their August 23, 2019 meeting. The application is due to Caltrans by September 7, 2019; therefore, I would request that the RTC consider authorizing the sponsored project at its September 5, 2019 meeting.

110 Vernon Street, Santa Cruz, CA 95060 (831) 426-6080, FAX (831) 426-6117

METRO online at <http://www.scmttd.com>

9-08D.1

Attachment D

If the RTC concurs, please provide a letter to METRO stating that RTC will sponsor METRO's FY20 SGR project in accordance with State of Good Repair Program Guidelines.

Please call me if you would like to discuss any part of this proposal.

Thank you.

Sincerely,

Alex Clifford
CEO/General Manager



DATE: August 23, 2019

TO: Board of Directors

FROM: Wondimu Mengistu, Grants/Legislative Analyst

SUBJECT: CONSIDER A RESOLUTION AUTHORIZING THE CEO TO SUBMIT APPLICATIONS AND EXECUTE AGREEMENTS FOR GRANTS FROM THE FEDERAL TRANSIT ADMINISTRATION AND FROM THE CALIFORNIA DEPARTMENT OF TRANSPORTATION

I. RECOMMENDED ACTION

That the Board of Directors adopt a Resolution authorizing the CEO to submit grant applications and execute agreements for funding from the Federal Transportation Administration and from the California Department of Transportation

II. SUMMARY OF ISSUES

- The Federal Transit Administration (FTA) and the California Department of Transportation (Caltrans) solicit multiple grant applications each year.
- A continuing resolution is acceptable for many FTA and Caltrans grant applications, especially for the annual formula programs.
- This Resolution will be valid for three years, unless rescinded earlier by the Board of Directors.
- Authorizing the Resolution (Attachment A) will allow the CEO to apply for specific grants and execute contracts with the FTA and Caltrans without further action by the Board of Directors.

III. DISCUSSION

The FTA and Caltrans release multiple grant opportunities every year. In the past, Santa Cruz Metropolitan Transit District (METRO) staff prepared a separate staff report and Board Resolution for each grant program, although not all grants require a program-specific resolution. Sponsors accept a continuing resolution for several grant programs, especially those that are allocated by formula every year.

A continuing resolution would enable the CEO to apply and execute agreements for grants in the FTA and Caltrans funding programs without

further Board action. The continuing resolution shortens the process of preparing a grant application.

The attached non-specific resolution will be valid for three years, unless the Board of Directors chooses to rescind it earlier for any reason.

Staff recommends that the Board of Directors adopt the attached continuing resolution for grant applications and agreements for funding from the FTA and Caltrans.

IV. FINANCIAL CONSIDERATIONS

Funding for grants will be presented to the Board for consideration in the annual budget process and in the quarterly grant program status reports.

V. ATTACHMENTS

Attachment A: Authorizing Resolution

Prepared by: Wondimu Mengistu, Grants/Legislative Analyst

VI. APPROVALS

Barrow Emerson, Planning
And Development Director



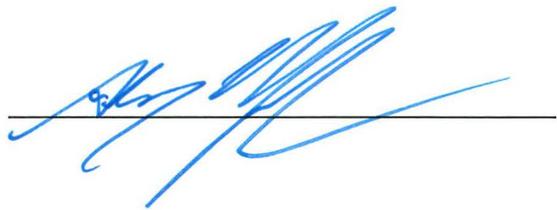
A handwritten signature in blue ink, appearing to read "Barrow Emerson", written over a horizontal line.

Approved as to fiscal impact:
Angela Aitken, CFO



A handwritten signature in blue ink, appearing to read "Angela Aitken", written over a horizontal line.

Alex Clifford, CEO/General Manager



A handwritten signature in blue ink, appearing to read "Alex Clifford", written over a horizontal line.

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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:

RESOLUTION OF THE BOARD OF DIRECTORS OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT AUTHORIZING APPLICATIONS AND EXECUTION OF AGREEMENTS FOR GRANTS FROM THE FEDERAL TRANSIT ADMINISTRATION AND THE CALIFORNIA DEPARTMENT OF TRANSPORTATION

WHEREAS, the Santa Cruz Metropolitan Transit District regularly applies for grant funds from the Federal Transit Administration and from the California Department of Transportation; and

WHEREAS, it is not always necessary or timely to prepare a specific Board Resolution for each grant program; and

WHEREAS, it is in the interest of the Santa Cruz Metropolitan Transit District to submit applications for funding; and

WHEREAS, this Resolution will be valid for three years from the date of execution, or less if the Board rescinds this Resolution for any reason.

NOW, THEREFORE, BE IT RESOLVED, that the CEO/General Manager of the Santa Cruz Metropolitan Transit District is authorized to submit applications, sign all agreements, and take any further actions necessary to obtain funding from the Federal Transit Administration and from the California Department of Transportation.

PASSED AND ADOPTED this 23rd day of August 2019 by the following vote:

AYES: Directors -

NOES: Directors -

ABSTAIN: Directors –

Attachment A

Resolution No. _____
Page 2

ABSENT: Directors -

APPROVED _____
ED BOTTORFF
Board Chair

ATTEST _____
ALEX CLIFFORD
CEO/General Manager

APPROVED AS TO FORM:

JULIE SHERMAN
General Counsel



DATE: August 23, 2019

TO: Board of Directors

FROM: Angela Aitken, Chief Financial Officer

**SUBJECT: CONSIDERATION OF DECLARING VEHICLES AND/OR EQUIPMENT
AS EXCESS FOR PURPOSES OF DISPOSAL OR AUCTION**

I. RECOMMENDED ACTION

That the Board of Directors approve a resolution declaring vehicles and/or obsolete equipment as ready for disposal or auction and direct the CEO to dispose of the surplus items in conformance with METRO's Administrative Policy Number AP-2020 - Fixed Assets and Inventoried Items

II. SUMMARY

- In accordance with Santa Cruz Metropolitan Transit District's (METRO) policy on disposal of fixed assets, at least once per year the Chief Financial Officer shall recommend to the Board of Directors a list of items to be declared excess with appropriate action for disposal.
- Vehicles and/or equipment have exceeded their useful lives and are no longer needed by METRO.
- Staff recommends that the Board of Directors approve the resolution for the disposal or auction of excess property (Attachment A) and declare the item(s) listed in Exhibit A as excess and direct staff to use appropriate action for disposal.

III. DISCUSSION/BACKGROUND

The following vehicles/equipment identified in the Excess Vehicle & Equipment Listing (Exhibit A) have become obsolete and surpassed their useful life expectancy:

- Two (2) 2003 Orion CNG buses in poor condition.
- The two vehicles recommended for disposal have each been depreciated to \$1,209, so there is no financial obligation to a granting agency with regard to the recommended disposal. The cost to repair and continue using these vehicles outweighs their value; therefore, they are recommended for disposal at this time.

Disposal of these assets has been coordinated with management and staff in processing them for disposal and auction if appropriate.

Staff recommends that the Board of Directors approve a resolution (Attachment A) and declare the items listed in Exhibit A as excess and direct staff to use appropriate action for disposal.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The estimated gross market value of these vehicles is approximately \$3,000; all vehicles have reached the end of their useful life and are obsolete. There is no financial impact because of these disposals.

Any revenue generated from the sale of these vehicles will be recorded as income in the current fiscal year's operating budget to 'Gain / Loss Disposal on Assets' budget account 407090-100.

V. ALTERNATIVES CONSIDERED

- Keep the vehicles in inventory. Staff does not recommend this alternative because the vehicles have exceeded their useful life, and are cost prohibitive to repair.

VI. ATTACHMENTS

Attachment A: Resolution to Approve for the Disposal or Auction of Excess Property

Exhibit A: Excess Vehicle & Equipment Listing—as of August 23, 2019

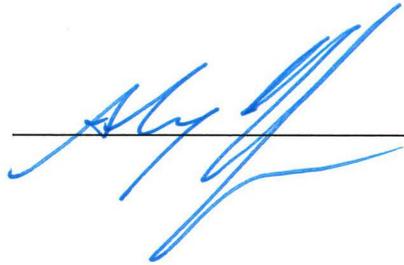
Prepared by: Debbie Kinslow, Finance Deputy Director

VII. APPROVALS:

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

allow for AA

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:

RESOLUTION TO APPROVE THE DISPOSAL OR AUCTION OF EXCESS ASSETS

WHEREAS, the Santa Cruz Metropolitan Transit District (District), receives federal financial assistance from the Federal Transit Administration (FTA) to acquire real property, equipment and supplies, and rolling stock; and

WHEREAS, all such assets must be managed, used, and disposed of in accordance with applicable laws and regulations; and

WHEREAS, the FTA prescribes the method and delivers guidance to public transit operators to comply with grant management requirements in accordance with the regulations in *Title 49 Code of Federal Regulations, part 24 (49CFR 24)* and FTA Circular 5010.1E; and

WHEREAS, the acquisition cost of each item identified as excess is greater than \$5,000; and

WHEREAS, the District has determined that it is necessary to either dispose of the property, and/or to place the items up for auction.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF DIRECTORS OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT, that it hereby resolves, determines and orders as follows:

1. The following assets are declared excess property on the Excess Vehicle & Equipment Listing as of 8/23/19, "Exhibit A" and may be disposed of or auctioned as such:
 - a. "One (1) 2003 Orion CNG Bus no. 2301";
 - b. "One (1) 2003 Orion CNG Bus no. 2310";

Attachment A

Resolution No. _____
Page 2 of 3

PASSED AND ADOPTED by the Board of Directors of the Santa Cruz Metropolitan Transit District on August 23, 2019, by the following vote:

AYES: DIRECTORS –

NOES: DIRECTORS –

ABSENT: DIRECTORS –

ABSTAIN: DIRECTORS –

Ed Botorff, Board Chair

ATTEST:

ALEX CLIFFORD
CEO/General Manager

APPROVED AS TO FORM:

JULIE SHERMAN
General Counsel

Attachment A

Resolution No. _____

Page 3 of 3

EXHIBIT A, SANTA CRUZ METROPOLITAN TRANSIT DISTRICT RESOLUTION NO. _____

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
EXCESS VEHICLE & EQUIPMENT LISTING AS OF 8/23/19

(Attached)



DATE: August 23, 2019

TO: Board of Directors

FROM: Angela Aitken, CFO

SUBJECT: CONSIDERATION OF APPROVAL OF AUDIT ENGAGEMENT LETTER WITH BROWN ARMSTRONG ACCOUNTANCY CORPORATION FOR FINANCIAL AUDIT AND TAX SERVICES FOR THE FISCAL YEAR ENDED JUNE 30, 2019

I. RECOMMENDED ACTION

That the Board of Directors approve and authorize execution of the Audit Engagement Letter with Brown Armstrong Accountancy Corporation for financial audit and tax services for the fiscal year ended June 30, 2019

II. SUMMARY

- Attached for review and approval is Brown Armstrong Accountancy Corporation's Audit Engagement Letter (Attachment A) for the fiscal year ended June 30, 2019.
- The Audit Engagement Letter states the terms and conditions of the engagement, principally addressing the scope of the engagement and the terms of compensation for Brown Armstrong Accountancy Corporation.
- The Audit Engagement Letter also defines the legal relationship between Santa Cruz Metropolitan Transit District (METRO) and Brown Armstrong Accountancy Corporation and provides a detailed description of the services that will be provided through the audit process.
- Annually, the auditors must obtain an audit engagement letter signed by management and those in charge of governance (the CEO and a BOD member) before they can finalize and issue their audit report to METRO.

III. DISCUSSION/BACKGROUND

State law requires that METRO undergo an audit of their financial statements on an annual basis. The statements are to be prepared and presented in conformity with accounting principles generally accepted in the United States of America and must be audited in accordance with auditing standards generally accepted in the United States of America by a firm of Certified Public Accountants licensed to practice in the State of California. Due to the significant level of Federal grant funding that METRO receives annually, the audit must also be conducted in accordance with the standards applicable to financial audits contained in *Government Auditing Standards* ("Yellow Book"), issued by the Comptroller General of the United States of the Government Accountability Office (GAO), and

the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance).

Beginning with the FY18 audit, Brown Armstrong Accountancy Corporation will prepare a separate stand-alone audit report for the financial statements of Measure D funds received and used by METRO, and will report on evidence that the expenditure of Measure D sales tax funds was in accordance with the Expenditure Plan developed by the Santa Cruz County Regional Transportation Commission (SCCRTC) and adopted by Santa Cruz County voters in November 2016. This audit is a requirement under the Measure D Master Funding Agreement between the SCCRTC and METRO.

Additional requirements also include a separate audit report to indicate METRO's compliance, as outlined by Section 6667 of the California Administrative Code, with the Transportation Development Act (TDA), including Public Utility Code Section 99245; and compliance with all statutes related to the Public Transportation Modernization Improvement and Service Enhancement Account (PTMISEA) funding held and received during the year.

On May 18, 2018 METRO awarded a three-year contract with two one-year options to Brown Armstrong Accountancy Corporation for a total amount not to exceed \$124,149 for financial audit and tax services for fiscal years 2018-2020 (three-year contract). The contract was amended to include \$5,000 in additional fees for the one-time preparation of the Independent Auditor Statement (IAS-FD) that is required for the FY18 FTA National Transit Database (NTD) submission, which increased the contract not-to-exceed amount to \$129,149. The all-inclusive maximum price for the FY19 audit and tax submission is \$41,097, and is reflected in Attachment A on page 8.

It is recommended that the Board approve and authorize execution of (sign) the attached Audit Engagement Letter in order to maintain compliance with the legal and regulatory requirements set forth herein. The Audit Engagement Letter needs to be signed by both the CEO and a member of the Board of Directors.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The required funding in the amount of \$41,097 is included in the FY20 current fiscal year's Finance department operating budget within the Accounting / Audit Fees (503011) budget account.

V. ALTERNATIVES CONSIDERED

Declining to sign the Audit Engagement Letter is an alternative, but is not recommended. Auditing standards dictate that the auditors obtain the written

agreement of management and those in charge of governance acknowledging that they accept and understand their responsibilities pertaining to the audit. Without a signed engagement letter, the auditors can not accept the audit engagement; therefore no audit report would be issued. Consequently, important grant funding would be jeopardized, as the timely submission of audited financial statement information to grantor agencies on an annual basis is a requirement for grant compliance and a condition for continued funding.

VI. ATTACHMENTS

Attachment A: Brown Armstrong – Audit Engagement Letter

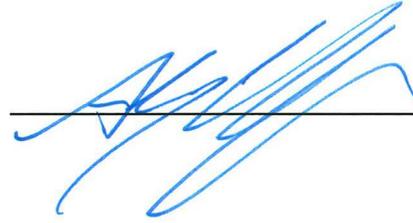
Prepared by: Debbie Kinslow, Finance Deputy Director

VII. APPROVALS:

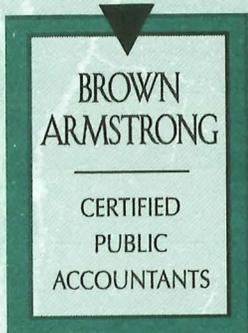
Approved as to fiscal impact:
Angela Aitken, CFO

allow for AA

Alex Clifford, CEO/General Manager



Attachment A



BROWN ARMSTRONG

Certified Public Accountants

June 24, 2019



Alex Clifford, Chief Executive Officer and
Board of Directors
Santa Cruz Metropolitan Transit District
110 Vernon Street
Santa Cruz, California 95060-2130

BAKERSFIELD OFFICE (MAIN OFFICE)

4200 TRUXTUN AVENUE
SUITE 300
BAKERSFIELD, CA 93309
TEL 661.324.4971
FAX 661.324.4997
EMAIL info@bacpas.com

FRESNO OFFICE

10 RIVER PARK PLACE EAST
SUITE 208
FRESNO, CA 93720
TEL 559.476.3592

LAGUNA HILLS OFFICE

23272 MILL CREEK DRIVE
SUITE 255
LAGUNA HILLS, CA 92653
TEL 949.652.5422

STOCKTON OFFICE

1919 GRAND CANAL BLVD
SUITE C6
STOCKTON, CA 95207
TEL 888.565.1040

WWW.BACPAS.COM

Dear Mr. Clifford and Board of Directors:

We are pleased to confirm our understanding of the services we are to provide Santa Cruz Metropolitan Transit District (Santa Cruz METRO) for the year ended June 30, 2019. We will audit the financial statements of the business-type activities, including the related notes to the financial statements, which collectively comprise the basic financial statements of Santa Cruz METRO as of and for the fiscal year ended June 30, 2019. Accounting standards generally accepted in the United States of America provide for certain required supplementary information (RSI), such as management's discussion and analysis (MD&A), to supplement Santa Cruz METRO's basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to Santa Cruz METRO's RSI in accordance with auditing standards generally accepted in the United States of America. These limited procedures will consist of inquiries of management regarding the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We will not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance. The following RSI is required by accounting principles generally accepted in the United States of America and will be subjected to certain limited procedures, but will not be audited:

- 1) Management's Discussion and Analysis
- 2) Schedule of Changes in the Net Pension Liability and Related Ratios
- 3) Schedule of Contributions – Pension
- 4) Schedule of Changes in the Net Other Postemployment Benefits (OPEB) Liability and Related Ratios
- 5) Schedule of Contributions – OPEB

We have also been engaged to report on supplementary information other than RSI that accompanies Santa Cruz METRO's financial statements. We will subject the following supplementary information to the auditing procedures applied in our audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records

Attachment A

Alex Clifford, Chief Executive Officer and
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Santa Cruz Metropolitan Transit District
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used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America, and we will provide an opinion on it in relation to the financial statements as a whole, in a report combined with our auditor's report on the financial statements:

- 1) Schedule of Expenditures of Federal Awards
- 2) Statement of Operating Expenses

Also, we will perform the following additional services as specified by our audit engagement with Santa Cruz METRO for the fiscal year ended June 30, 2019:

- 1) Single Audit Compliance Report in accordance with the U.S. Office Management and Budget (OMB) *Uniform Administrative Requirements, Cost Principles, and Audit Requirement for Federal Awards* (Uniform Guidance)
- 2) Measure D Audit Report

Audit Objectives

The objective of our audit is the expression of opinions as to whether Santa Cruz METRO's financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America and to report on the fairness of the supplementary information referred to in the second paragraph when considered in relation to the financial statements as a whole. The objective also includes reporting on—

- Internal control over financial reporting and compliance with provisions of laws, regulations, contracts, and award agreements, noncompliance with which could have a material effect on the financial statements in accordance with *Government Auditing Standards*.
- Internal control over compliance related to major programs and an opinion (or disclaimer of opinion) on compliance with federal statutes, regulations, and the terms and conditions of federal awards that could have a direct and material effect on each major program in accordance with the Single Audit Act Amendments of 1996 and Title 2 U.S. *Code of Federal Regulations* (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance).

The *Government Auditing Standards* report on internal control over financial reporting and on compliance and other matters will include a paragraph that states that (1) the purpose of the report is solely to describe the scope of testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of Santa Cruz METRO's internal control or on compliance, and (2) the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Santa Cruz METRO's internal control and compliance. The Uniform Guidance report on internal control over compliance will include a paragraph that states that the purpose of the report on internal control over compliance is solely to describe the scope of testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Both reports will state that the report is not suitable for any other purpose.

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Alex Clifford, Chief Executive Officer and
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Page Three

Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America; the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; the Single Audit Act Amendments of 1996; and the provisions of the Uniform Guidance, and will include tests of accounting records, a determination of major program(s) in accordance with the Uniform Guidance, and other procedures we consider necessary to enable us to express such opinions. We will issue written reports upon completion of our Single Audit. Our reports will be addressed to the Board of Directors of Santa Cruz METRO. We cannot provide assurance that unmodified opinions will be expressed. Circumstances may arise in which it is necessary for us to modify our opinions or add an emphasis-of-matter or other-matter paragraph(s). If our opinions are other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed opinions, we may decline to express opinions or issue reports, or we may withdraw from this engagement.

Audit Procedures—General

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements. We will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to Santa Cruz METRO or to acts by management or employees acting on behalf of Santa Cruz METRO. Because the determination of abuse is subjective, *Government Auditing Standards* do not expect auditors to provide reasonable assurance of detecting abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements or noncompliance may exist and not be detected by us, even though the audit is properly planned and performed in accordance with auditing standards generally accepted in the United States of America and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements or on major programs. However, we will inform the appropriate level of management of any material errors, any fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential, and of any material abuse that comes to our attention. We will include such matters in the reports required for a Single Audit. Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, and may include tests of the physical existence of inventories, and direct confirmation of receivables and certain other assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will request written representations from your attorneys as part of the engagement, and they may bill you for responding to this inquiry. At the conclusion of our

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Alex Clifford, Chief Executive Officer and
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Santa Cruz Metropolitan Transit District
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Page Four

audit, we will require certain written representations from you about your responsibilities for the financial statements; schedule of expenditures of federal awards; federal award programs; compliance with laws, regulations, contracts, and grant agreements; and other responsibilities required by auditing standards generally accepted in the United States of America.

Audit Procedures—Internal Control

Our audit will include obtaining an understanding of Santa Cruz METRO and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

As required by the Uniform Guidance, we will perform tests of controls over compliance to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with compliance requirements applicable to each major federal award program. However, our tests will be less in scope than would be necessary to render an opinion on those controls and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to the Uniform Guidance.

An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. Accordingly, we will express no such opinion. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards, *Government Auditing Standards*, and the Uniform Guidance.

Audit Procedures—Compliance

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of Santa Cruz METRO's compliance with provisions of applicable laws, regulations, contracts, and agreements, including grant agreements. However, the objective of those procedures will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

The Uniform Guidance requires that we also plan and perform the audit to obtain reasonable assurance about whether the auditee has complied with federal statutes, regulations, and the terms and conditions of federal awards applicable to major programs. Our procedures will consist of tests of transactions and other applicable procedures described in the *OMB Compliance Supplement* for the types of compliance requirements that could have a direct and material effect on each of Santa Cruz METRO's major programs. The purpose of these procedures will be to express an opinion on Santa Cruz METRO's compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance.

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Alex Clifford, Chief Executive Officer and
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Other Services

We will also assist in preparing the financial statements, schedule of expenditures of federal awards, and related notes of Santa Cruz METRO in conformity with accounting principles generally accepted in the United States of America and the Uniform Guidance based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*. We will perform the services in accordance with applicable professional standards. The other services are limited to the financial statements, schedule of expenditures of federal awards, and related notes services previously defined. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

Management Responsibilities

Management is responsible for (1) designing, implementing, establishing, and maintaining effective internal controls relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, including internal controls over federal awards, and for evaluating and monitoring ongoing activities to help ensure that appropriate goals and objectives are met; (2) following laws and regulations; (3) ensuring that there is reasonable assurance that government programs are administered in compliance with compliance requirements; and (4) ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles; for the preparation and fair presentation of the financial statements, schedule of expenditures of federal awards, and all accompanying information in conformity with accounting principles generally accepted in the United States of America; and for compliance with applicable laws and regulations (including federal statutes) and the provisions of contracts and grant agreements (including award agreements). Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for program compliance and for the accuracy and completeness of that information.

Management is also responsible for making all financial records and related information available to us and for the accuracy and completeness of that information. You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the Uniform Guidance, (3) additional information that we may request for the purpose of the audit, and (4) unrestricted access to persons within Santa Cruz METRO from whom we determine it necessary to obtain audit evidence.

Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting Santa Cruz METRO involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud

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Alex Clifford, Chief Executive Officer and
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Page Six

could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting Santa Cruz METRO received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that Santa Cruz METRO complies with applicable laws, regulations, contracts, agreements, and grants. Management is also responsible for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements, or abuse that we report. Additionally, as required by the Uniform Guidance, it is management's responsibility to evaluate and monitor noncompliance with federal statutes, regulations, and the terms and conditions of federal awards; take prompt action when instances of noncompliance are identified including noncompliance identified in audit findings; promptly follow up and take corrective action on reported audit findings; and prepare a summary schedule of prior audit findings and a separate corrective action plan. The summary schedule of prior audit findings should be available for our review.

You are responsible for identifying all federal awards received and understanding and complying with the compliance requirements and for the preparation of the schedule of expenditures of federal awards (including notes and noncash assistance received) in conformity with the Uniform Guidance. You agree to include our report on the schedule of expenditures of federal awards in any document that contains and indicates that we have reported on the schedule of expenditures of federal awards. You also agree to include the audited financial statements with any presentation of the schedule of expenditures of federal awards that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the schedule of expenditures of federal awards in accordance with the Uniform Guidance; (2) you believe the schedule of expenditures of federal awards, including its form and content, is stated fairly in accordance with the Uniform Guidance; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the schedule of expenditures of federal awards.

You are also responsible for the preparation of the other supplementary information, which we have been engaged to report on, in conformity with accounting principles generally accepted in the United States of America. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary information in accordance with accounting principles generally accepted in the United States of America; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with accounting principles generally accepted in the United States of America; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the Audit Objectives section of this letter. This responsibility includes relaying to

Attachment A

Alex Clifford, Chief Executive Officer and
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Page Seven

us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions, for the report, and for the timing and format for providing that information.

You agree to assume all management responsibilities relating to the financial statements, schedule of expenditures of federal awards, and related notes, and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter our assistance with preparation of the financial statements, schedule of expenditures of federal awards, and related notes and that you have reviewed and approved the financial statements, schedule of expenditures of federal awards, and related notes prior to their issuance and have accepted responsibility for them. Further, you agree to oversee the nonaudit services by designating an individual, preferably from senior management, with suitable skill, knowledge, or experience; evaluate the adequacy and results of those services; and accept responsibility for them.

Engagement Administration, Fees, and Other

We may from time to time and depending on the circumstances, use third-party service providers in serving your account. We may share confidential information about you with these service providers, but remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures, and safeguards to protect the confidentiality of your personal information. In addition, we will secure confidentiality agreements with all service providers to maintain the confidentiality of your information and we will take reasonable precautions to determine that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others. In the event that we are unable to secure an appropriate confidentiality agreement, you will be asked to provide your consent prior to the sharing of your confidential information with the third-party service provider. Furthermore, we will remain responsible for the work provided by any such third-party service providers.

We understand that your employees will prepare all cash, accounts receivable, or other confirmations we request and will locate any documents selected by us for testing.

At the conclusion of the engagement, we will complete the appropriate sections of the Data Collection Form that summarizes our audit findings. It is management's responsibility of Santa Cruz METRO to electronically submit the reporting package (including financial statements, schedule of expenditures of federal awards, summary schedule of prior audit findings, auditor's reports, and corrective action plan) along with the Data Collection Form to the federal audit clearinghouse. We will coordinate with you the electronic submission and certification. The Data Collection Form and the reporting package must be submitted within the earlier of 30 calendar days after receipt of the auditor's reports or nine months after the end of the audit period.

We will provide copies of our reports to Santa Cruz METRO; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

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Alex Clifford, Chief Executive Officer and
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Page Eight

The audit documentation for this engagement is the property of Brown Armstrong Accountancy Corporation and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to the Department of Transportation or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Brown Armstrong Accountancy Corporation personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of five years after the report release date or for any additional period requested by the Department of Transportation or its designee. If we are aware that a federal awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

We expect to begin our audit on approximately August 5, 2019, and to issue our reports no later than December 31, 2019. Ryan L. Nielsen is the engagement partner and is responsible for supervising the engagement and signing the reports or authorizing another individual to sign them.

Our fee for these services will be at our standard hourly rates plus out-of-pocket costs (such as report reproduction, word processing, postage, travel, copies, telephone, etc.) except that we agree that our gross fee, including expenses, will not exceed \$41,097 for the financial statements and tax returns. Our standard hourly rates vary according to the degree of responsibility involved and the experience level of the personnel assigned to your audit. Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 90 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report(s). You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate before we incur the additional costs.

All disputes under this agreement shall be submitted to mediation. Each party shall designate an executive officer empowered to attempt to resolve the dispute. Should the designated representatives be unable to agree on a resolution, a competent and impartial third party acceptable to both parties shall be appointed to mediate. Each disputing party shall pay an equal percentage of the mediator's fees and expenses. No suit or arbitration proceedings shall be commenced under this agreement until at least 60 days after the mediator's first meeting with the involved parties. In the event that the dispute is required to be litigated, the court shall be authorized to assess litigation costs against any party found not to have participated in the mediation process in good faith.

You have requested that we provide you with a copy of our most recent external peer review report and any subsequent reports received during the contract period. Our most recent peer review report accompanies this letter.

9-11A.8

Attachment A

Alex Clifford, Chief Executive Officer and
Board of Directors
Santa Cruz Metropolitan Transit District
June 24, 2019
Page Nine

We appreciate the opportunity to be of service to Santa Cruz METRO and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Sincerely,

BROWN ARMSTRONG
ACCOUNTANCY CORPORATION



By: Ryan L. Nielsen

RLN:mlc:mmj
Enclosure

Pfx Engagement\74043 6/30/19 Audit\PSR-2-1 Audit Engagement Letter Single Audit Draft SC

RESPONSE:

This letter correctly sets forth the understanding of Santa Cruz METRO.

Management signature: _____

Title: _____

Date: _____

Governance signature: _____

Title: _____

Date: _____

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DATE: August 23, 2019
TO: Board of Directors
FROM: Angela Aitken, Chief Financial Officer
**SUBJECT: RENEWAL OF PROPERTY INSURANCE COVERAGE FOR FY20
WITH ZURICH AMERICAN INSURANCE COMPANY**

I. RECOMMENDED ACTION

That the Board of Directors authorize the renewal of property insurance coverage with Zurich American Insurance Company

II. SUMMARY

- Santa Cruz Metropolitan Transit District (METRO) maintains property insurance on all its owned facilities and on leased facilities in accordance with lease agreements, as well as on building contents.
- Staff recommends that the Board of Directors authorize the renewal of property insurance coverage with Zurich American Insurance Company for \$57,343.

III. DISCUSSION/BACKGROUND

Marsh & McLennan, METRO's property insurance broker, has arranged for renewal of property insurance coverage with Zurich American Insurance Company. This is all risk coverage, excluding earthquake and flood, and includes buildings and contents, computer and telephone systems, employee tools, and other equipment, with a \$5,000 deductible.

The Zurich American Insurance Company is rated A+ XV by A. M. Best. The "A+" is the superior or highest rating on the A.M. Best rating scale, and "XV" refers to financial size category (FSC) and is based on adjusted policyholders' surplus. "XV" translates to two billion or greater.

METRO carries separate policies for flood insurance for the Judy K. Souza Operations Building at 1200 "A" River Street and the Fueling and Service Building at 1200 "B" River Street.

METRO does not carry earthquake insurance.

Staff recommends that the Board of Directors authorize the renewal of property insurance coverage with Zurich American Insurance Company for \$57,343. The annualized year-over-year increase is \$2,279 or 4.14%, and is due to increasing some of the property limits based on updated Marshall & Swifts data.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The following outlines the elements of the above recommendation:

1. AMOUNT OF RECOMMENDATION: \$57,343
2. SOURCE OF FUNDING: FY20 Operating Budget
3. EXPENSE ACCOUNTS TO CHARGE: Ins. Property - 506011
4. FISCAL IMPACT:
 - The cost for the recommendation of renewal of property insurance for \$57,343 is included in the Finance Department FY19 – FY20 final operating budget. The recommended amount includes a Client Services Fee (broker fee) of \$12,000. This fee covers all services related to the agency's property and flood insurance, and includes employment practices liability (EPL), and cyber liability insurance as well.

V. ALTERNATIVES CONSIDERED

- Using an alternate insurance carrier is certainly an option but could negatively affect the cost, coupled with the fact that no other insurance companies bid on the renewal.
- METRO could self-insure, but does not currently have the cash reserves to support such a program.

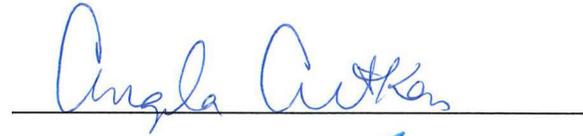
VI. ATTACHMENTS

None

Prepared By: Debbie Kinslow, Finance Deputy Director

VII. APPROVALS:

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



Alex Clifford, CEO/General Manager



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DATE: August 23, 2019
TO: Board of Directors
FROM: Dawn Crummié, Human Resources Director
SUBJECT: CONSIDERATION OF RATIFICATION OF CONTRACT WITH ALLIANT INSURANCE SERVICES, INC. FOR EMPLOYEE VISION CARE INSURANCE NOT TO EXCEED \$701,500

I. RECOMMENDED ACTION

That the Board of Directors ratify the execution of a contract with Alliant Insurance Services, Inc. as broker for Employee Vision Care Insurance with Vision Service Plan via CSAC EIA in an amount not to exceed \$701,500, for a term not to exceed seven (7) years

II. SUMMARY

- The Santa Cruz Metropolitan Transit District (METRO) provides Vision Care Insurance to its employees and their families. METRO's contract with Vision Service Plan (VSP) expired on July 31, 2019, with no further options to renew.
- A formal request for proposals was conducted to solicit proposals from qualified firms. Representatives from SEIU and SMART reviewed the draft specifications prior to issuance, and no changes were recommended.
- Four (4) firms submitted proposals for METRO's review, including VSP.
- A three (3)-member evaluation team comprised of METRO staff reviewed and evaluated the proposals, and recommended an award to Alliant Insurance Services, Inc. (Alliant) for VSP Insurance via the California State Association of Counties Excess Insurance Authority (CSAC EIA).
- Due to delays in both issuance of the procurement and evaluation of proposals, and the METRO Board not meeting in July, it was necessary to execute a contract with Alliant prior to this Board Meeting in order to maintain continuity of coverage. Staff is recommending that the Board now ratify the execution of this contract.

III. DISCUSSION/BACKGROUND

VSP has been METRO's provider of employee Vision Care Insurance for many years, having been awarded a contract following the previous four formal procurements issued for these services. As VSP's contract was due to expire on July 31, 2019, with no further options to renew, METRO issued a new Request for Proposals (RFP) No. 19-06 for Employee Vision Care Insurance. The issuance of this RFP was delayed due to circumstances beyond the control of Purchasing staff.

On May 14, 2019, RFP No. 19-06 was legally advertised and distributed to 12 firms, notice was posted on METRO's website, and email notices were sent to all GovDelivery subscribers. On June 10, 2019, proposals were received and opened from four (4) firms. A list of these firms is provided in Attachment A.

A three (3)-member evaluation team comprised of METRO staff reviewed and evaluated the proposals. The evaluation team used the following criteria as contained in the Request for Proposals:

Evaluation Criteria	Points
Qualifications and Experience	20
Coverage/benefits offered	50
References	10
Cost/Price proposal	20
Total Points Possible	100

Due to complex benefits analysis between the two highest ranked offerors, VSP and Alliant, contract award was further delayed. Alliant's proposal, submitted as an insurance broker, offered vision care insurance from VSP via the CSAC EIA Joint Powers Authority (JPA) that matched METRO's current benefits, but for an 11% lower monthly cost.

Alliant is the largest public entity broker/consultant in California, and their relationship with JPAs enables them to provide cost-effective insurance solutions to JPA member organizations. METRO is a CSAC EIA member, and in fact already utilizes CSAC EIA pool insurance, with Alliant as broker, for Life and Accidental Death and Dismemberment, Long Term Disability, Excess Workers' Compensation, and Dental Insurances.

The evaluation team recommended an award for Employee Vision Care Insurance to Alliant. In order to maintain continuity of coverage, a contract with Alliant has already been executed in an amount not to exceed \$701,500, and for a term not to exceed seven (7) years. Staff is recommending that the Board of Directors now ratify the execution of this contract. Contractor will provide all services meeting all METRO's specifications and requirements of the contract. Dawn Crummié, Human Resources Director, will serve as the Contract Administrator and will ensure contract compliance.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The value of the contract is \$701,500 for the entire term, which is not to exceed seven (7) years. The initial insurance plan is for a 17-month period, and may be extended in accordance with the terms and conditions of the pool renewal offered for VSP through CSAC EIA, which is generally on a multi-year basis.

Funds to support this contract are included in each department's Fringe Benefit (account #502045) Operating Budget. The estimated annual cost ranges from \$105,000 to \$110,000.

V. ALTERNATIVES CONSIDERED

- Staff considered recommending an award to VSP and continuing with coverage directly from them. However, the lower rates Alliant can offer for the same VSP insurance via the CSAC EIA pool, as well as the benefit of having the same administrative platform for Vision Care Insurance as for METRO's Dental Insurance, resulted in the recommendation to award to Alliant.

VI. ATTACHMENTS

Attachment A: List of Responding Firms

Attachment B: Contract with Alliant Insurance Services, Inc.

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

Prepared by: Joan Jeffries, Administrative Specialist

VII. APPROVALS:

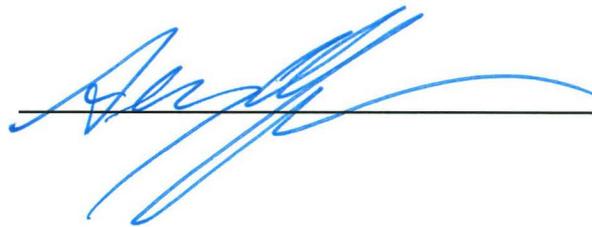
Dawn Crummié, Human Resources Director



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



Alex Clifford, CEO/General Manager



Attachment A



Responding Firms for RFP No. 19-06

Employee Vision Care Insurance

Received by June 10, 2019 at 5:00 PM

Alliant Insurance Services, Inc.	San Francisco	CA
EyeMax Vision Plan	Orange	CA
Superior Vision Services, Inc.	Linthicum	MD
Vision Service Plan	Rancho Cordova	CA

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Attachment B

PROFESSIONAL SERVICES CONTRACT FOR EMPLOYEE VISION CARE INSURANCE (19-06)

THIS CONTRACT is made effective on August 1, 2019 between the SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (“Santa Cruz METRO”), a political subdivision of the State of California, and ALLIANT INSURANCE SERVICES, INC. (“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 Vision Care Insurance

Santa Cruz METRO has the need for Employee Vision Care Insurance. In order to obtain these services, Santa Cruz METRO issued a Request for Proposals, dated May 14, 2019, 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 broker qualified to provide Employee Vision Care Insurance and whose principal place of business is 100 Pine Street, 11th Floor, San Francisco, CA 94111. Pursuant to the Request for Proposals issued by Santa Cruz METRO, Contractor submitted a proposal for Employee Vision Care Insurance with Vision Service Plan (“VSP”) through the California State Association of Counties Excess Insurance Authority (“CSAC EIA”) pool, which is attached hereto and incorporated herein by reference as Exhibit B.

1.4 Selection of Contractor and Intent of Contract

On July 16, 2019, Santa Cruz METRO selected Contractor as the offeror whose proposal was most advantageous to Santa Cruz METRO to provide the Employee Vision Care Insurance 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 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.

Attachment B

A. Exhibit A

Santa Cruz METRO's "Request for Proposals" dated May 14, 2019, including Addendum No. 1 dated May 30, 2019, and Addendum No. 2 dated June 5, 2019.

B. Exhibit B (Contractor's Proposal)

Contractor's Proposal to Santa Cruz METRO for Employee Vision Care Insurance, signed by Contractor and dated June 7, 2019.

2.2 Conflicts

Where in conflict, the provisions of this writing supersede those of the above-referenced documents, Exhibits A and B. Where in conflict, the provisions of Exhibit A 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 these services in accordance with the Request for Proposals issued May 14, 2019.

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 May 14, 2019.

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.

Attachment B

4. TIME OF PERFORMANCE

4.1 Term

The term of the initial insurance plan will be for a period of 17 months, from August 1, 2019 through December 31, 2020.

At the option of Santa Cruz METRO, the plan may be extended in accordance with the terms and conditions of the pool renewal offered for VSP through CSAC EIA, which is generally on a multi-year basis.

The total term of this Contract is not to exceed seven (7) years.

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 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 **\$701,500** 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. Contractor's invoices shall include detailed records showing the following for each employee covered under the plan: name; coverage tier (employee only, employee + spouse, employee + child, or employee + family); premium amount; adjustments (if any); division (active, retiree, or COBRA); and employee ID (last 4 digits of social security number).

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.

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.

Attachment B

Santa Cruz METRO

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

Attention: Alex Clifford, CEO

CONTRACTOR

Alliant Insurance Services, Inc.
100 Pine Street, 11th Floor
San Francisco, CA 94111

Attention: Leah Ledda, Account Executive
(415) 403-1479
leah.ledda@alliant.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.

SIGNATURES ON NEXT PAGE

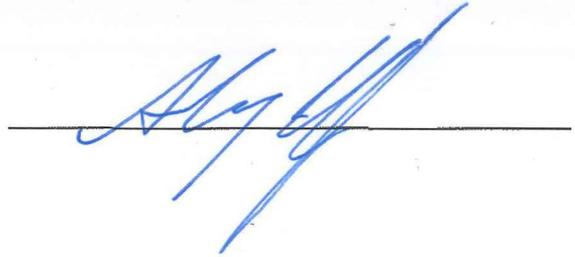
Attachment B

Signed on _____

7/25/19

Santa Cruz METRO –
SANTA CRUZ METROPOLITAN TRANSIT
DISTRICT

Alex Clifford, CEO/General Manager



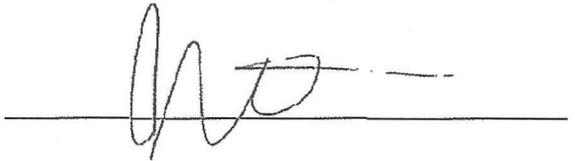
Contractor –
ALLIANT INSURANCE SERVICES, INC.

Christine Kerns, Senior Vice President



Approved as to Form:

Julie A. Sherman, General Counsel



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DATE: August 23, 2019
TO: Board of Directors
FROM: Freddy Rocha, Facilities Manager
SUBJECT: CONSIDERATION OF AWARD OF CONTRACT TO CENTRAL ELECTRIC COMPANY FOR PURCHASE AND INSTALLATION OF AN EMERGENCY POWER GENERATOR NOT TO EXCEED \$307,732

I. RECOMMENDED ACTION

That the Board of Directors authorize the CEO to execute a contract with Central Electric Company for Purchase and Installation of an Emergency Power Generator in an amount not to exceed \$279,756, with a \$27,976 contingency

II. SUMMARY

- The Santa Cruz Metropolitan Transit District (METRO) has a need for a new emergency power generator at its Administration building, located at 110 Vernon Street, Santa Cruz.
- A competitive procurement was conducted to solicit bids from qualified firms. One firm submitted a bid for METRO's review.
- Staff has reviewed the submitted bid and is recommending that the Board of Directors authorize a contract with Central Electric Company.

III. DISCUSSION/BACKGROUND

METRO currently has an emergency backup generator at its Administration building that does not meet power demands should there be an emergency with loss of power. The equipment for METRO's entire I.T system resides at this location, and it is the only system powered by the generator during power loss; no additional power is available for staff needs. The purchase and installation of a new generator is required at this time. The existing generator will be relocated to the Watsonville Transit Center or the Scotts Valley facility if possible.

On June 11, 2019, METRO legally advertised and distributed Invitation for Bids (IFB) No. 19-18 for Purchase and Installation of an Emergency Power Generator to six firms and builders' exchanges, posted notice on its website, and sent email notices to all GovDelivery subscribers. On July 16, 2019, a single bid was received and opened from Central Electric Company. Staff reviewed the bid submitted, and determined that Central Electric Company is a responsible bidder whose bid is responsive to all the requirements of the IFB, and whose bid is fair and reasonable. Established in 1912 in Watsonville, Central Electric Company is

a local, family run business owned and operated by the fourth generation of its founders.

Staff recommends that the Board of Directors authorize the CEO to execute a contract on behalf of METRO with Central Electric Company for Purchase and Installation of an Emergency Power Generator in an amount not to exceed \$279,756. Staff is also requesting to add a 10% contingency to this amount, or \$27,976, and approval authority for the CEO to execute any necessary change orders up to this contingency amount. Contractor will provide all equipment and materials meeting all of METRO's specifications and requirements of the contract. Freddy Rocha, Facilities Manager, will serve as the Contract Administrator and will ensure contract compliance.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The value of the contract is \$279,756. The addition of a 10% contingency for any necessary change orders would bring the total to \$307,732. Funds to support this contract are being requested from Capital cash reserves.

V. ALTERNATIVES CONSIDERED

- Do not award this contract. This is not recommended, as staff at the Administration building cannot currently remain working when there is a power outage.

VI. ATTACHMENTS

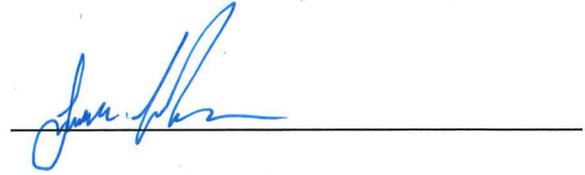
Attachment A: Contract with Central Electric Company

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

Prepared by: Joan Jeffries, Administrative Specialist

VII. APPROVALS:

Freddy Rocha, Facilities Manager

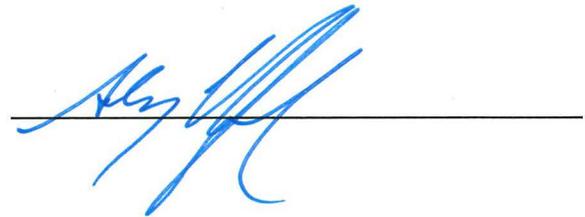


Approved as to fiscal impact:
Angela Aitken, Chief Financial Officer

ok as for AA



Alex Clifford, CEO/General Manager



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Attachment A

CONTRACT FOR THE PURCHASE AND INSTALLATION OF AN EMERGENCY POWER GENERATOR

No. 19-18

THIS CONTRACT is made effective on August 28, 2019 between the SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (“Santa Cruz METRO”), a political subdivision of the State of California, and DUFOUR INCORPORATED d/b/a CENTRAL ELECTRIC COMPANY (“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 the Purchase and Installation of an Emergency Power Generator

Santa Cruz METRO requires the Purchase and Installation of an Emergency Power Generator. In order to obtain said Purchase and Installation of an Emergency Power Generator, Santa Cruz METRO issued an Invitation for Bids, dated June 11, 2019, setting forth specifications for Purchase and Installation of an Emergency Power Generator. The Invitation for Bids is attached hereto and incorporated herein by reference as Exhibit A.

1.3 Contractor’s Bid Form

Contractor is a licensed general contractor desired by Santa Cruz METRO and whose principal place of business is 430 Walker Street, Watsonville, CA 95076. Pursuant to the Invitation for Bids issued by Santa Cruz METRO, Contractor submitted a bid for provision of said Purchase and Installation of an Emergency Power Generator, which is attached hereto and incorporated herein by reference as Exhibit B.

1.4 Selection of Contractor and Intent of Contract

On July 29, 2019, Santa Cruz METRO selected Contractor as the lowest responsive, responsible bidder to provide said Purchase and Installation of an Emergency Power Generator, located at 110 Vernon Street, Santa Cruz. The purpose of this Contract is to set forth the provisions of this procurement.

1.5 Contractor and Supplier Synonymous

For the purposes of this Contract, the terms “Contractor” and “supplier” are synonymous.

Santa Cruz METRO and Contractor agree as follows:

2. INCORPORATED DOCUMENTS AND APPLICABLE LAW

Attachment A

2.1 Documents Incorporated in This Contract

The documents 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 Contract, except for written amendments, if any, made after the date of this Contract.

a) Exhibit A

Santa Cruz Metropolitan Transit District's "Invitation for Bids No. 19-18" dated June 11, 2019, including Addendum number 1.

b) Exhibit B (Bid Form)

Contractor's submitted bid to Santa Cruz METRO for the Purchase and Installation of an Emergency Power Generator as signed by Contractor.

2.2 Conflicts

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

2.3 Recitals

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

3. TIME OF PERFORMANCE

3.1 General

The work under this Contract shall be completed no later than December 20, 2019.

3.2 Term

The term of this Contract shall commence upon the execution of the Contract by Santa Cruz METRO. Issuance of a Notice to Proceed shall remain in force until Final Acceptance as provided by Part IV, Section 21 of this Contract.

3.3 Acceptance of Terms

Execution of this document shall be deemed as acceptance of all of the terms and conditions as set forth herein and those contained in the Instructions to Bidders, the General Conditions, the Special Conditions, the Specifications for Work and all attachments and addenda, which are incorporated herein by reference as integral parts of this Contract.

4. SCOPE OF WORK

4.1 Contractor shall furnish Santa Cruz METRO all supervision, labor, equipment, supplies, material, freight, transportation, tools and other work and services as specified in and in full

Attachment A

accordance with the Invitation for Bids (IFB) No. 19-18 dated June 11, 2019 for the Purchase and Installation of an Emergency Power Generator. The Contractor shall provide a complete project in conformance with the intent shown on the drawings and specified herein and as provided for and set forth in the IFB.

- 4.2 Contractor and Santa Cruz METRO agree to comply with and fulfill all obligations, promises, covenants and conditions imposed upon each of them in the Contract Documents. All of said work done under this Contract shall be performed to the satisfaction of Santa Cruz METRO or its representative, who shall have the right to reject any and all materials and supplies furnished by Contractor which do not strictly comply with the requirements contained herein, together with the right to require Contractor to replace any and all work furnished by Contractor which shall not either in workmanship or material be in strict accordance with the Contract Documents.

5. COMPENSATION

5.1 Terms of Payment

Santa Cruz METRO agrees to pay Contractor an amount not to exceed Two Hundred Seventy-Nine Thousand, Seven Hundred Fifty-Six Dollars (\$279,756) as identified in the Bid Form, Exhibit B, for satisfactory completion of all work, including all costs for labor, materials, tools, equipment, services, freight, insurance, overhead, profit and all other costs incidental to the performance of the services specified under this Contract. A schedule of values shall be submitted to Santa Cruz METRO on which all progress payments shall be based. Payments for completed work will be made within thirty (30) days of receipt of progress payment request. Contractor understands and agrees that if it exceeds the \$279,756 maximum amount payable under this Contract, it does so at its own risk.

5.2 Release of Claims

Payment by Santa Cruz METRO of undisputed contract amounts is contingent upon Contractor furnishing Santa Cruz METRO with a Release of All Claims against Santa Cruz METRO arising by virtue of the part of the Contract related to those amounts.

5.3 Retention of progress payments

Santa Cruz METRO will retain five (5%) percent of the contract price from each progress payment made pursuant to the Contract through the completion of the Contract. The retention shall be released, with the exception of 150 percent (150%) of any disputed amount, within 60 days after the date of completion of the work. Pursuant to Section 22300 of the Public Contract Code, Contractor may substitute a deposit of securities in lieu of Santa Cruz METRO withholding any monies to ensure Contractor's performance under the Contract, or alternatively, request that Santa Cruz METRO make payment of retentions earned directly to an escrow agent at the expense of Contractor. The provisions of Public Contract Code Section 22300 are incorporated herein by reference as though set forth in full, and shall govern the substitution of securities and/or escrow account. If a Stop Notice is filed, Santa Cruz METRO will retain 125% of the amount set forth in the Stop Notice from the next progress payment made to Contractor.

Attachment A

5.4 Change in Contract Price

5.4.1 General

- A. The Contract price constitutes the total compensation payable to Contractor for performing the work. All duties, responsibilities, and obligations assigned to or undertaken by Contractor to perform the work shall be at Contractor's expense without change in the Contract price.
- B. The Contract price may only be changed by a change order. Any request for an increase in the Contract price shall be based on written notice delivered by the Contractor to the Contract Administrator promptly, but in no event later than 10 days after the date of the occurrence of the event giving rise to the request, and shall state the general nature of the request. Notice of the amount of the request with supporting data shall be delivered within 45 days after the date of the occurrence, unless the Contract Administrator allows an additional period of time to ascertain more accurate data in support of the request, and shall be accompanied by the Contractor's written statement that the amount requested covers all amounts (direct, indirect, and consequential) to which the Contractor is entitled as a result of the occurrence of the event. No request for an adjustment in the Contract price will be valid if not submitted in accordance with this Article.
- C. The value of any work covered by a change order or of any request for an increase or decrease in the Contract price shall be determined in one of the following ways:
 1. Where the work involved is covered by unit prices contained in the Contract documents, by application of unit prices to the quantities of the items involved; or
 2. By mutual acceptance of a lump sum, which may include an allowance for overhead and profit not necessarily in accordance with Article 5.4.4; or
 3. On the basis of the cost of work (determined as provided in Articles 5.4.2 and 5.4.3) plus a Contractor's fee for overhead and profit (determined as provided in Article 5.4.4).

5.4.2 Cost of Work (Based on Time and Materials)

- A. General: The term "cost of work" means the sum of all costs necessarily incurred and paid by Contractor for labor, materials, and equipment in the proper performance of work. Except as otherwise may be agreed to in writing by Santa Cruz METRO, such costs shall be in amounts no higher than those prevailing in the locality of the project.
- B. Labor: The cost of labor used in performing work by Contractor, a subcontractor, or other forces, will be the sum of the following:
 1. The actual wages paid plus any employer payments to or on behalf of workers for fringe benefits, including health and welfare, pension, vacation, and similar purposes. The cost of labor may include the wages paid to foremen when it is

Attachment A

determined by the Contract Administrator that the services of foremen do not constitute a part of the overhead allowance.

2. There will be added to the actual wages, as defined above, a percentage set forth in the latest "Labor Surcharge and Equipment Rental Rates" in use by the California State Department of Transportation which is in effect on the date upon which the work is accomplished. This percentage shall constitute full compensation for all payments imposed by State and Federal laws including, but not limited to, workers' compensation insurance and Social Security payments.
 3. The amount paid for subsistence and travel required by collective bargaining agreements.
 4. For equipment operators, payment for the actual cost of labor and subsistence or travel allowance will be made at the rates paid by Contractor to other workers operating similar equipment already on the work, or in the absence of such labor, established by collective bargaining agreements for the type of workers and location of the extra work, whether or not the operator is actually covered by such an agreement. A labor surcharge will be added to the cost of labor described herein in accordance with the provisions of subsection 2 of Article 5.4.2 B herein, which surcharge shall constitute full compensation for payments imposed by State and Federal laws, and all other payments made to on behalf of workers other than actual wages.
- C. Materials: The cost of materials used in performing work will be the cost to the purchaser, whether Contractor or subcontractor, from the supplier thereof, except as the following are applicable:
1. Trade discounts available to the purchaser shall be credited to Santa Cruz METRO notwithstanding the fact that such discounts may not have been taken by Contractor.
 2. For materials secured by other than a direct purchase and direct billing to the purchaser, the cost shall be deemed to be the price paid to the actual supplier as determined by the Contract Administrator. Markup, except for actual costs incurred in the handling of such materials, will not be allowed.
 3. Payment for materials from sources owned wholly or in part by the purchaser shall not exceed the price paid by the purchaser for similar materials from said sources on extra work items or the current wholesale price for such materials delivered to the work site, whichever price is lower.
 4. If, in the opinion of the Contract Administrator, the cost of material is excessive, or the Contractor does not furnish satisfactory evidence of the cost of such material, then the cost shall be deemed to be the lowest current wholesale price for the quantity concerned delivered to the work site, less trade discount. Santa Cruz METRO reserves the right to furnish materials for the extra work and no claim shall be made by the Contractor for costs and profit on such materials.

Attachment A

- D. Equipment: The Contractor will be paid for the use of equipment at the rental rate listed for such equipment specified in the current edition of the Department of Transportation publication entitled "Labor Surcharge and Equipment Rental Rates" which is in effect on the date upon which the work is accomplished. Such rental rates will be used to compute payments for equipment whether the equipment is under the Contractor's control through direct ownership, leasing, renting, or another method of acquisition. The rental rate to be applied for use of each item of equipment shall be the rate resulting in the least total cost to Santa Cruz METRO for the total period of use. If it is deemed necessary by the Contractor to use equipment not listed in the foregoing publication, the Contract Administrator will establish an equitable rental rate for the equipment. The Contractor may furnish cost data that might assist the Contract Administrator in the establishment of the rental rate.
1. The rental rates paid, as above provided, shall include the cost of fuel, oil, lubrication supplies, small tools, necessary attachments, repairs and maintenance of all kinds, depreciation, storage, insurance, and all incidentals. Operators of equipment will be separately paid for as provided in subsection 4 of Article 5.4.2 B.
 2. All equipment shall be in good working condition and suitable for the purpose for which the equipment is to be used.
 3. Before construction equipment is used on the extra work, Contractor shall plainly stencil or stamp an identifying number thereon at a conspicuous location, and shall furnish to the Contract Administrator, in duplicate, a description of the equipment and its identifying number.
 4. Unless otherwise specified, manufacturer's ratings and manufacturer-approved modifications shall be used to classify equipment for the determination of applicable rental rates. Equipment which has no direct power unit shall be powered by a unit of at least the minimum rating recommended by the manufacturer.
 5. Individual pieces of equipment or tools having a replacement value of \$500 or less, whether or not consumed by use, shall be considered to be small tools and no payment will be made therefore.
- E. Owner-Operated Equipment: When owner-operated equipment is used to perform work and is to be paid for as extra work, Contractor will be paid for the equipment and operator as follows:

Payment for the equipment will be made in accordance with the provisions in Article 5.4.2 D, "Equipment."

Payment for the cost of labor and subsistence or travel allowance will be made at the rates paid by Contractor to other workers operating similar equipment already on the project, or, in the absence of such other workers, at the rates for such labor established by collective bargaining agreement for type of worker and location of the work, whether or not the owner-operator is actually covered by such an

Attachment A

agreement. A labor surcharge will be added to the cost of labor described herein, in accordance with the provisions in subsection 2 of Article 5.4.2 B, "Labor."

To the direct cost of equipment rental and labor, computed as provided herein, will be added the markup for equipment rental and labor as provided in Article 5.4.4, "Contractor's Fee."

- F. Equipment Time: The rental time to be paid for equipment on the work shall be the time the equipment is in productive operation on the work being performed and shall include the time required to move the equipment to the new location and return it to the original location or to another location requiring no more time than that required to return it to its original location; except that moving time will not be paid if the equipment is used on other than the extra work. Loading and transporting costs will be allowed, in lieu of moving time, when the equipment is moved by means other than its own power. No payment will be made for loading and transporting costs when the equipment is used at the site of the extra work on other than the extra work. The following shall be used in computing the rental time of equipment on the work:
1. When hourly rates are listed, any part of an hour less than 30 minutes of operation shall be considered to be ½-hour of operation, and any part of an hour in excess of 30 minutes will be considered 1-hour of operation.
 2. When daily rates are listed, operation for any part of a day less than 4 hours shall be considered to be ½-day of operation.
 3. Rental time will not be allowed while equipment is inoperative due to breakdowns or Contractor-caused delays.
- G. Cost of Work Documentation: The Contractor shall furnish the Contract Administrator Daily Extra Work Reports on a daily basis covering the direct costs of labor and materials and charges for equipment whether furnished by Contractor, subcontractor, or other forces. Santa Cruz METRO will provide the Daily Extra Work Report forms to Contractor. The Contractor or an authorized agent shall sign each Daily Extra Work Report. The Daily Extra Work Report shall provide names and classifications of workers and hours worked; size, type, and identification number of equipment; and the hours operated. Copies of certified payrolls and statement of fringe benefit shall substantiate labor charges. Valid copies of vendor's invoices shall substantiate material charges.

The Contract Administrator will make any necessary adjustments. When these reports are agreed upon and signed by both parties, they shall become the basis of payment for the work performed, but shall not preclude subsequent adjustment based on a later audit.

The Contractor shall inform the Contract Administrator when extra work will begin so that the Santa Cruz METRO inspector can concur with the Daily Extra Work Reports. Failure to conform to these requirements may impact the Contractor's ability to receive proper compensation.

Attachment A

5.4.3 Special Services

Special services are defined as that work characterized by extraordinary complexity, sophistication, or innovations, or a combination of the foregoing attributes that are unique to the construction industry. The following may be considered by the Contract Administrator in making estimates for payment for special services:

- A. When the Contract Administrator and the Contractor, by agreement, determine that a special service is required which cannot be performed by the forces of the Contractor or those of any of its subcontractors, the special service may be performed by an entity especially skilled in the work to be performed. After validation of invoices and determination of market values by the Contract Administrator, invoices for special services based upon the current fair market value thereof may be accepted without complete itemization of labor, material, and equipment rental costs.
- B. When Contractor is required to perform work necessitating special fabrication or machining process in a fabrication or a machine shop facility away from the jobsite, the charges for that portion of the work performed at the offsite facility may, by agreement, be accepted as a special service and accordingly, the invoices for the work may be accepted without detailed itemization.
- C. All invoices for special services will be adjusted by deducting all trade discounts offered or available, whether the discounts were taken or not. In lieu of the allowances for overhead and profit on labor, materials, and equipment specified in Article 5.4.4 herein, a single allowance of ten (10) percent will be added to invoices for special services.

5.4.4 Contractor's Fee

- A. Work ordered on the basis of time and materials will be paid for at the actual and necessary cost as determined by the Contract Administrator, plus allowances for overhead and profit, which allowances shall constitute the "Contractor's Fee," except as provided in subparagraph B of this Article. For extra work involving a combination of increases and decreases in the work, the actual necessary cost will be the arithmetic sum of the additive and deductive costs. The allowance for overhead and profit shall include compensation for superintendence, bond and insurance premiums, taxes, all field and home office expenses, and all other items of expense or cost not included in the cost of labor, materials, or equipment provided for under Articles 5.4.2 B, C, D, and E herein. The allowance for overhead and profit will be made in accordance with the following schedule:

Actual Necessary Cost	Overhead and Profit Allowance
Labor	33 percent
Materials.....	15 percent
Equipment.....	15 percent

- B. Labor, materials, and equipment may be furnished by the Contractor or by the subcontractor on behalf of the Contractor. When a subcontractor performs all or any part of the extra work, the allowance specified in subparagraph A of

Attachment A

Article 5.4.4 shall only be applied to the labor, materials, and equipment costs of the subcontractors, to which the Contractor may add 5 percent of the subcontractor's total cost for the extra work. Regardless of the number of hierarchal tiers of subcontractors, the 5 percent increase above the subcontractor's total cost, which includes the allowances for overhead and profit specified herein, may be applied one time only for each separate work transaction.

5.4.5 Compensation for Time Extensions

Adjustments in compensation for time extension will be allowed only for causes in Article 5.5.1 B.1 through Article 5.5.1 B.3 computed in accordance with Article 5.4 and the following. No adjustments in compensation will be allowed when Santa Cruz METRO-caused delays to a controlling item of work and Contractor-caused delays to a controlling item of work occur concurrently or for causes in Article 5.5.1 B.4 through Article 5.5.1 B.5.

5.5 Change of Contract Time

5.5.1 General

A. The Contract time may only be changed by a change order. Any request for an extension of the Contract time shall be based on written notice delivered by the Contractor to the Contract Administrator promptly, but in no event later than 10 days after the date of the occurrence of the event giving rise to the request, and shall state the general nature of the request. Notice of the extent of the request with supporting data shall be delivered within 45 days after the date of such occurrence, unless the Contract Administrator allows an additional period of time to ascertain more accurate data in support of the request, and shall be accompanied by the Contractor's written statement that the adjustment requested is the entire adjustment to which the Contractor has reason to believe it is entitled as a result of the occurrence of said event. No request for an adjustment in the Contract time will be valid if not submitted in accordance with the requirements of this Article.

The Contract time will only be extended when a delay occurs which impacts a controlling item of work as shown on the work schedules required in the Special Provisions. Time extensions will be allowed only if the cause is beyond the control and without the fault or negligence of the Contractor. Time extensions will also be allowed when Santa Cruz METRO-caused delays to a controlling item of work and Contractor-caused delays to a controlling item of work occur concurrently. The Contractor will be notified if the Contract Administrator determines that a time extension is not justified.

B. The Contract time will be extended in an amount equal to time lost due to delays beyond the control of the Contractor if a request is made therefore as provided in this Article. An extension of Contract time will only be granted for days on which the Contractor is prevented from proceeding with at least 75 percent of the normal labor and equipment force actually engaged on the said work, by said occurrences or conditions resulting immediately therefrom which impact a controlling item of work as determined by the Contract Administrator. Such delays shall include:

Attachment A

1. Changes.
2. Failure of Santa Cruz METRO to furnish access, right of way, completed facilities of related projects, drawings, materials, equipment, or services for which Santa Cruz METRO is responsible.
3. Survey error by Santa Cruz METRO.
4. Occurrences of a severe and unusual nature including, but not restricted to, acts of God, fires, other force majeure events, and excusable inclement weather. A force majeure event includes an earthquake, flood, cloudburst, cyclone or other cataclysmic phenomena of nature beyond the power of the Contractor to foresee or to make preparation in defense against, but does not include ordinary inclement weather. Excusable inclement weather is any weather condition, the duration of which varies in excess of the average conditions expected, which is unusual for the particular time and place where the work is to be performed, or which could not have been reasonably anticipated by the Contractor, as determined from U.S. Weather Bureau records for the preceding 3-year period or as provided for in the Special Provisions.
5. Act of the public enemy, act of another governmental entity, public utility, epidemic, quarantine restriction, freight embargo, strike, or labor dispute. A delay to a subcontractor or supplier due to the above circumstances will be taken into consideration for extensions to the time of completion.

5.5.2 Extensions of Time for Delay Due to Excusable Inclement Weather

- A. The Contract time will be extended for as many days in excess of the average number of days of excusable inclement weather, as defined in Article 5.5.1 B.5, as the Contractor is specifically required under the Special Provisions to suspend construction operations, or as many days as the Contractor is prevented by excusable inclement weather, or conditions resulting immediately therefrom, from proceeding with at least 75 percent of the normal labor and equipment force engaged on critical items of work as shown on the schedule.
- B. Should the Contractor prepare to begin work at the regular starting time at the beginning of any regular work shift on any day on which excusable inclement weather, or the conditions resulting from the weather, prevents work from beginning at the usual starting time and the crew is dismissed as a result thereof, the Contractor will be entitled to a 1-day extension whether or not conditions change thereafter during said day and the major portion of the day could be considered to be suitable for such construction operations.
- C. The Contractor shall base the construction schedule upon the inclusion of the number of days of excusable inclement weather specified in the Article titled "Excusable Inclement Weather Delays," of the Special Provisions. No extension of the Contract time due to excusable inclement weather will be considered until after the said aggregate total number of days of excusable inclement weather has been reached; however, no reduction in Contract time would be made if said number of days of excusable inclement weather is not reached.

Attachment A

5.6 Changed Site Conditions

If any work involves digging trenches or other excavations below the surface, Contractor shall promptly, and before the following conditions are disturbed, notify Santa Cruz METRO in writing of any:

- A. Material that Contractor believes may be a regulated material which is required to be removed to a Class I, Class II, or Class III disposal site in accordance with provisions of existing law.
- B. Subsurface or latent physical conditions at the site differing from those indicated in this Contract.
- C. Unknown physical conditions at the site of any unusual nature, different materially from those ordinarily encountered and generally recognized as inherent in work of the character provided for in the Contract.

Santa Cruz METRO will promptly investigate the condition and if it finds that the conditions do materially so differ, or do involve regulated material, and cause a decrease or increase in the Contractor's cost of, or the time required for, performance of any part of the work, Santa Cruz METRO will issue a change order under the procedures described in this Contract. For regulated materials, Santa Cruz METRO reserves the right to use other forces for exploratory work to identify and determine the extent of such material and for removing regulated material from such areas.

In the event that a dispute arises between Santa Cruz METRO and the Contractor on whether the conditions materially differ or on the Contractor's cost of, or time required for, performance of any part of the work, the Contractor shall not be excused from any scheduled completion date provided for by this Contract but shall proceed with all work to be performed under the Contract. The Contractor shall retain any and all rights provided either by this Contract or by law, which pertain to the resolution of disputes and protests between the contracting parties.

5.7 Waivers and Releases

Contractor is required to provide unconditional waivers and releases of stop notices in accordance with California Civil Code §3262(d)(2). Santa Cruz METRO agrees to pay Contractor within 30 days after receipt of an undisputed and properly submitted payment request from Contractor. If Santa Cruz METRO fails to make such payments in a timely manner, Santa Cruz METRO shall pay interest to Contractor equivalent to the legal rate set forth in Subdivision (a) of Section 685.010 of the Code of Civil Procedure. For purposes of this section, "progress payment" includes all payments due Contractor, except that portion of the final payment designated by the Contract as retention earnings. Any payment request determined not to be a proper payment request suitable for payment shall be returned to Contractor as soon as practicable, but not later than seven days after receipt. A request returned pursuant to this paragraph shall be accompanied by a written explanation of why the payment request is not proper. The number of days available to Santa Cruz METRO to make a payment without incurring interest pursuant to this section shall be reduced by the number of days by which Santa Cruz METRO exceeds the seven-day return requirement set forth above. A payment request shall be considered properly executed if funds are available for

Attachment A

payment of the payment request and payment is not delayed due to an audit inquiry by Santa Cruz METRO's financial officer.

6. NOTICES

All notices under this Contract shall be in writing and shall be effective when received, if delivered by hand, or three (3) days after posting if sent by registered mail, return 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/General Manager

CONTRACTOR

Central Electric Company
430 Walker Street
Watsonville, CA 95076

Attention: Tony Kulich, President
(831) 251-7100
tony@centralelectriccompany.com

7. ENTIRE AGREEMENT

7.1 This Contract represents the entire agreement of the parties with respect to the subject matter hereof, and all such agreements entered into prior hereto are revoked and superseded by this Contract, and no representations, warranties, inducements or oral agreements have been made by any of the parties except as expressly set forth herein, or in other contemporaneous written agreements.

7.2 This Contract may not be changed, modified or rescinded except in writing, signed by all parties hereto, and any attempt at oral modification of this Contract shall be void and of no effect.

8. 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

Attachment A

Contract may be executed in two or more counterparts, all of which constitute one and the same instrument.

9. 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.

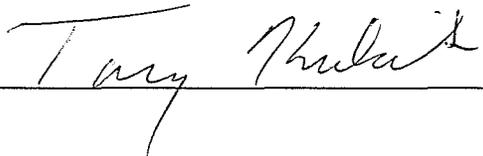
Signed on _____

Santa Cruz METRO –
SANTA CRUZ METROPOLITAN TRANSIT
DISTRICT

Alex Clifford, CEO/General Manager

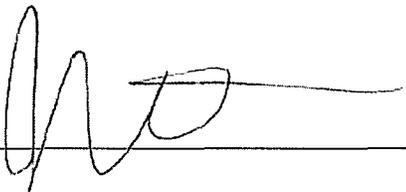
Contractor –
DUFOUR INCORPORATED d/b/a
CENTRAL ELECTRIC COMPANY

Tony Kulich, President



Approved as to Form:

Julie A. Sherman, General Counsel



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DATE: August 23, 2019
TO: Board of Directors
FROM: Dawn Crummié, HR Director
SUBJECT: APPROVAL OF THE FINAL SEIU POSITION DESCRIPTIONS

I. RECOMMENDED ACTION

That the Board of Directors approve the final SEIU position descriptions

II. SUMMARY

- An SEIU Classification and Total Compensation Study was needed for Santa Cruz Metropolitan Transit District (METRO), 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 Classification study in August 2018.
- 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' SEIU Classification Study Report, which included revised job descriptions for the SEIU staff positions.
- METRO and SEIU met and conferred on the new position descriptions and have come to a final agreement.
- Staff recommends that the Board of Directors approve the final SEIU position descriptions.

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 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, which we are in the midst of now.

In August 2018, the Board of Directors approved the award of 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 by 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.

Staff has reviewed the final job classification descriptions, met and conferred with SEIU on the resulting position descriptions, and developed an agreed upon class series that resulted in 75 position descriptions and 37 class series (Attachment A).

The SEIU Classification Report, corresponding position descriptions and agreed upon class series document are being used for the Total Compensation phase of the study.

IV. FINANCIAL CONSIDERATIONS/IMPACT

There is no financial impact to adopting these final SEIU Position Descriptions.

V. ALTERNATIVES CONSIDERED

- The Board could decline to accept the results of the SEIU meet and confer process on the position descriptions.
 - Staff does not recommend this as METRO's outdated job specifications affect the agency's ability to attract and retain valuable personnel.
- The Board could discuss alternative approaches to the SEIU meet and confer process on the position descriptions and delegate the matter to the Personnel Committee for further review, analysis, and the development of a recommendation back to the full Board.

VI. ATTACHMENTS

Attachment A: Final SEIU agreed to 37 series and 75 positions – June 6, 2019

Attachment B: CPS SEIU Position Descriptions - as of June 14, 2019

Prepared by: Angela Aitken, CFO
Dawn Crummié, HR Director

VII. APPROVALS

Dawn Crummié, HR Director



Approved as to fiscal impact:
Angela Aitken, CFO



Alex Clifford, CEO/General Manager



75 positions	1	2	3	4
	Custodial Series	Facilities Maintenance Series	Vehicle Service Series	Upholsterer Series
leveling terms	Entry/First working level			
	Journey	Facilities Maintenance Worker I	Vehicle Service Worker I	
	Advanced	Facilities Maintenance Worker II	Vehicle Service Worker II	Upholsterer I
	Advanced - Lead	Lead Facilities Maintenance Worker	Vehicle Service Detailer	Upholsterer II
	Supervisor I		Lead Vehicle Service Worker	
	Supervisor II			
	Supervisor III	Facilities Maintenance Supervisor		
	Agreement	Agreement	Agreement	Agreement

Attachment A

Final SEIU agreed to 37 series and 75 positions - 060619

75 positions	5	6	7	8
	<u>Vehicle Body Repair Mechanic Series</u>	<u>Mechanic Series</u>	<u>Parts Series</u>	<u>Customer Service Series</u>
leveling terms	<u>Classes</u>			
	Series across			
	Entry/First working level	Mechanic I		
	Journey	Mechanic II	Parts and Materials Clerk	Customer Service Representative
	Advanced	Mechanic III		
	Advanced - Lead	Lead Mechanic	Lead Parts and Materials Clerk	Senior Customer Service Representative
	Supervisor I			
	Supervisor II			
	Supervisor III	Fleet Maintenance Supervisor	Parts and Materials Supervisor	Customer Service Supervisor
		Agreement	Agreement	Agreement

9-15A.2

75 positions					
	Series across	14	15	16	
	Classes	Safety & Training Series	Safety and Training Program Specialist Series	Information Technology Support Analyst Series	
leveling terms	Entry/First working level		Safety and Training Program Specialist I	Information Technology Support Analyst I	
	Journey		Safety and Training Program Specialist II	Information Technology Support Analyst II	
	Advanced				
	Advanced - Lead	Transit Supervisor			
	Supervisor I	Assistant Safety & Training Coordinator			
	Supervisor II	Safety & Training Coordinator			
	Supervisor III				
		Agreement	Agreement	Agreement	
		Transit Supervisor			
		Agreed to put in this class on 06/06/19, instead of in its own class.			

Attachment A

Final SEIU agreed to 37 series and 75 positions - 060619

75 positions	17	18	19	20	21
	Systems Administrator Series	Transportation Planner Series	Planning Aide Series	Planning Data Analyst Series	Claims Technician Series
leveling terms	Classes				
	Series across				
	Entry/First working level	Transportation Planner I	Planning Aide		Claims Technician I
	Journey	Transportation Planner II		Planning Data Analyst	Claims Technician II
	Advanced				
	Advanced - Lead	Senior Transportation Planner			
	Supervisor I				
	Supervisor II				
	Supervisor III	Transportation Planning Supervisor			
		Agreement	Agreement	Agreement	Agreement

9-15A.5

Attachment A

Final SEIU agreed to 37 series and 75 positions - 060619

75 positions	22	23	24	25	26	27
	<u>Purchasing Series</u>	<u>Financial Analyst Series</u>	<u>Rev Collection Series</u>	<u>Revenue Account Series</u>	<u>Paralegal Series</u>	<u>Benefits Technician Series</u>
leveling terms						
	Buyer	Financial Analyst	Revenue Collection Clerk	Revenue Account Coordinator	Paralegal I	Benefits Technician
	Purchasing Agent	Senior Financial Analyst			Paralegal II	
			Revenue Collection Supervisor			
	Agreement	Agreement	Agreement	Agreement	Agreement	Agreement
		11/28/18 - Mgmt offer is to make positions confidential				

9-15A.6

75 positions	28	29	30	31
Series across	Electronic Technician Series	HR Clerical Series	HR Tech Series	HR Generalist Series
Classes				
leveling terms	Entry/First working level			
	Journey	Human Resources Clerk	Human Resources Technician	
	Advanced	Human Resources Specialist		Principle Human Resources Generalist
	Advanced - Lead			
	Supervisor I			
	Supervisor II			
	Supervisor III			
	Agreement	Agreement	Agreement	Agreement

Attachment A

Final SEIU agreed to 37 series and 75 positions - 060619

75 positions	Series across	32	33	34	35	36
	Classes	Grants Series	Legal Sec Series	AS Coordinator Series	Para Elig Coord Series	Scheduling Series
leveling terms	Entry/First working level					
	Journey	Grants/Legislative Analyst	Legal Secretary	Accessible Services Coordinator	Paratransit Eligibility Coordinator	Scheduling Analyst
	Advanced					
	Advanced - Lead					
	Supervisor I					
	Supervisor II					
	Supervisor III					
		Agreement	Agreement	Agreement	Agreement	Agreement

75 positions		
	Series across	37
	Classes	Purchasing Assistant Series
leveling terms	Entry/First working level	
	Journey	
	Advanced	Purchasing Assistant
	Advanced - Lead	
	Supervisor I	
	Supervisor II	
	Supervisor III	
		Agreement

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CPS SEIU Position Descriptions

As of June 14, 2019

Accessible Services Coordinator
Accountant I
Accountant II
Accounting Clerk
Accounting Specialist
Accounting Technician
Administrative Assistant
Administrative Clerk
Administrative Specialist
Administrative Supervisor
Assistant Safety and Training Coordinator
Benefits Technician
Buyer
Claims Technician I
Claims Technician II
Custodial Service Worker
Custodial Supervisor
Customer Service Representative
Customer Service Supervisor
Electronic Technician
Facilities Maintenance Supervisor
Facilities Maintenance Worker I
Facilities Maintenance Worker II
Financial Analyst
Fleet Maintenance Supervisor
Grants/Legislative Analyst
Human Resources Clerk
Human Resources Specialist
Human Resources Technician
Information Technology Support Analyst I
Information Technology Support Analyst II

CPS SEIU Position Descriptions

As of June 14, 2019

Lead Custodial Service Worker
Lead Facilities Maintenance Worker
Lead Mechanic
Lead Parts and Materials Clerk
Lead Vehicle Service Worker
Legal Secretary
Mechanic I
Mechanic II
Mechanic III
Paralegal I
Paralegal II
Paratransit Eligibility Coordinator
Parts and Materials Clerk
Parts and Materials Supervisor
Payroll Specialist
Planning Aide
Planning Data Analyst
Principal HR Generalist
Purchasing Agent
Purchasing Assistant
Revenue Account Coordinator
Revenue Collection Clerk
Revenue Collection Supervisor
Safety and Training Coordinator
Safety and Training Program Specialist I
Safety and Training Program Specialist II
Scheduling Analyst
Senior Accounting Technician
Senior Customer Service Representative
Senior Financial Analyst
Senior Payroll Specialist

CPS SEIU Position Descriptions

As of June 14, 2019

Senior Systems Administrator

Senior Transportation Planner

Systems Administrator

Transit Supervisor

Transportation Planner I

Transportation Planner II

Transportation Planning Supervisor

Upholsterer I

Upholsterer II

Vehicle Body Repair Mechanic

Vehicle Service Detailer

Vehicle Service Worker I

Vehicle Service Worker II

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

*Class Code: AS101
FLSA Status: Non-exempt*

Accessible Services Coordinator Bargaining Unit: SEA

DEFINITION:

Under direction, the Accessible Services Coordinator performs program administrative and operations duties to assist Santa Cruz Metro riders, the older adult and disabled community utilize Santa Cruz METRO transit services; provides outreach and education to current and potential customers to encourage the use of Santa Cruz METRO's accessible services; plans, coordinates, develops, and implements Santa Cruz METRO's Mobility Training Program; serves as a liaison and information source to customers, community agencies, and the public regarding Santa Cruz METRO accessibility services and Mobility Training; supports Santa Cruz METRO management in ensuring that Santa Cruz METRO's vehicles and services comply with the Americans With Disabilities Act (ADA) requirements; performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Accessible Services Coordinator is a journey-level class in this series. An incumbent in this class is primarily responsible for planning, developing, coordinating, and providing Santa Cruz 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 Santa Cruz METRO policies and procedures.
- Plans and implements Santa Cruz 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 Santa Cruz 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 Santa Cruz METRO's accessibility services.
- Creates teaching materials and presents ADA-related training to Santa Cruz METRO staff as assigned.
- Serves as a liaison and information source to customers, community agencies and the public with regard to Santa Cruz METRO accessibility services and the Mobility Training Program.
- Works with Santa Cruz METRO management to help ensure that Santa Cruz METRO's vehicles and services comply with Americans with Disabilities Act (ADA) requirements.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Reviews, investigates and responds to ADA complaints as assigned.
- May be required to serve 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.
- 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; utilizes computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles of program organization, administration and coordination.
- Common transit agency policies and procedures associated with 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 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 ratios, percentages, and intermediate statistics.
- 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.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Instruct others in the safe utilization of Santa Cruz METRO vehicles and services and adapt training procedures to the needs of the individual.
- Act as liaison between Santa Cruz 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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.



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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; 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 work out in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Transit Operations
*Job Series:	Accessible Services
*Job Series Level:	Journey
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: P0200
FLSA Status: Non-exempt*

**Accountant I
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Accountant I performs a limited range of professional accounting duties related to Santa Cruz 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 Santa Cruz METRO accounting systems and sub-systems; learns to reconcile the General Ledger and various bank records; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Accountant I is the journey-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 advanced 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 advanced 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 Santa Cruz 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; utilizes computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages, and intermediate statistics.
- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities for CPA certification.

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

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Professional
*Job Series: Accountant
*Job Series Level: Journey
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: P0201
FLSA Status: Non-exempt*

**Accountant II
Bargaining Unit: SEA**

DEFINITION:

Under direction, an Accountant II performs professional accounting duties to support Santa Cruz METRO financial functions and processes; analyzes and reconciles accounting records for compliance with State and Federal laws, regulations, and requirements; coordinates the development of Santa Cruz METRO accounting systems and sub-systems; reconciles the General Ledger and various bank records; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Accountant II is the advanced 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 journey-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 advanced 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.

- Plans, coordinates, and project manages Santa Cruz METRO's participation in annual financial statement audit and in the preparation of annual audited financial statements and notes; develops management discussion points and analysis in accordance with legal requirements; effectively performs a variety of governmental accounting and variance analysis assignment.
- 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 capturing data necessary for control purposes and recording accurate revenue activity.
- Develops and recommends Santa Cruz METRO financial policies and procedures; provides technical assistance to accounting clerical staff; provides training on new or updated procedures to Finance and other staff as needed, reviews accounting systems and practices and recommends improvements.
- 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 and archives accounting records, depreciation schedules for capital assets purchased under Federal and State grants; post accounts distribution for all revenue/grant receipts; documents grant funding source for capital asset purchases.



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- Prepare, review, and file tax returns; analyze and research tax issues that arise and recommend course of action as a matter of professional opinion.
- Utilizes fixed asset management software as part of capital asset tracking.
- Analyzes and investigates variances between actual and budgeted expenditures necessitating realignment of budget, payments, or correction of general ledger activity 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, such as internal audit testing and surprise cash counts.
- Provides information to employees and the public.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles, practices, forms and techniques of professional public sector accounting, finance, and budgeting.
- Thorough knowledge of Generally Accepted Accounting Principles (GAAP) used by state and local governments, 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 percentages and intermediate statistics.
- 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.



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- Perform professional accounting activities in compliance with applicable laws, regulations, and policies.
- Consult with and advise management on a wide variety of financial issues
- Maintain complex financial/statistical data and records.
- 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.
- Demonstrate exceptional time management and organizational skills to ensure timely completion and delivery of a variety of reports and filings required by grantors
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.
- Utilizes fixed asset management software as part of capital asset tracking.

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 principles of accounting, intermediate accounting, advanced accounting, governmental accounting, fund accounting, cost accounting, auditing, financial accounting, managerial accounting or business law.

AND

Three (3) years of professional accounting experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities for CPA certification.



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Santa Cruz METRO**

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

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Professional
*Job Series: Accountant
*Job Series Level: Advanced
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS113
FLSA Status: Non-exempt*

**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; performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Accounting Clerk is a journey-level clerical class in the series. 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 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.
- 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; utilizes computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



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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 percentages and basic statistics.
- Telephone techniques and etiquette.
- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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, data entry, typing, and maintaining detailed records.

Experience must have also included at least one (1) year of clerical accounting work.



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Santa Cruz METRO**

LICENSES AND CERTIFICATES:

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

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

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

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

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Financial Clerical
*Job Series:	Accounting Clerk
*Job Series Level:	Journey
*Confidential:	No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: PP102
FLSA Status: Non-exempt*

**Accounting Specialist
Bargaining Unit: SEA**

DEFINITION:

Under direction, an Accounting Specialist performs advanced technical accounting duties to support Santa Cruz 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; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Accounting 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 Senior Accounting Technician 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 Santa Cruz Metro Center 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 Santa Cruz Metro Center; provides fund balance and transaction information for other staff as requested.
- 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; utilizes computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages, intermediate statistics, and financial data conventions.
- 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.
- Coordinate and perform technical accounting activities in a manner that complies with applicable laws, regulations, and policies.



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- 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 timelines and due dates.
- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college, in accounting, business administration or a related field

AND

Three (3) years of experience requiring journey-level technical bookkeeping, financial recordkeeping, and/or accounts payable/receivable work, preferably in a public agency.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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.



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

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

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Technical
*Job Series: Accounting Technician
*Job Series Level: Advanced
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: PP100
FLSA Status: Non-exempt*

**Accounting Technician
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Accounting Technician 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Accounting Technician is the entry/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 Senior Accounting Technician 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.



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- Monitors insurance policies for properties under contract with Santa Cruz METRO; tracks 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 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages, intermediate statistics, and financial data conventions.
- The effective use of modern office equipment, personal computers, and standard business software.



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Ability to:

- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information using tact and discretion.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 certificate of proficiency from an accredited college 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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Santa Cruz METRO**

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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Financial Clerical
*Job Series:	Accounting Technician
*Job Series Level:	Entry/First working
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS103
FLSA Status: Non-exempt*

**Administrative Assistant
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Administrative Assistant performs journey-level and difficult clerical duties to relieve management staff of administrative detail; assists in the preparation of difficult 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Administrative Assistant is a journey-level class in the series. An incumbent in this class performs a wide range of administrative duties that require 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 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 meetings involving multiple participants and/or locations; prepares and distributes agendas and meeting materials; maintains appointment calendars for management.
- Enters and retrieves information from both hard copy and electronic records; utilizes various manual and electronic tools to log, track, summarize, and report information.
- Maintains, and updates general administrative filing systems in accordance with departmental records retention programs; documents retention storage; creates reference material.
- Budget tracking for department.



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- Receives and assists in gathering 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 employee arrangement to attend meetings.
- Assists in coordinating projects and assignments.
- Operates standard office equipment; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

EMPLOYMENT STANDARDS:

Knowledge of:

- 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.
- Intermediate mathematics, including percentages and Intermediate statistics.
- Advanced telephone techniques and etiquette.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Interpret and apply Santa Cruz 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 40 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.



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- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 recordkeeping systems.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted: 12-11-18

*BOD Approved: 00-00-00



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*Revised: 00-00-00
*Job Family: Administrative Clerical
*Job Series: Administrative
*Job Series Level: Journey
*Confidential: Yes, in Human Resources Department



**HUMAN RESOURCES DEPARTMENT
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*Class Code: AS102
FLSA Status: Non-exempt*

**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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Administrative Clerk is an entry/first-working level class in the series. 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 journey 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; inputs 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 conferences and training seminars.
- Operates standard office equipment; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



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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 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, percentages and basic statistics.
- Telephone techniques and etiquette.
- 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 40 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Clerical
*Job Series:	Administrative
*Job Series Level:	Entry/First working
*Confidential:	No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS104
FLSA Status: Non-exempt*

**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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Administrative Specialist is an advanced level class in the series. 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. Develop administer, maintain and adhere to Santa Cruz METRO's travel principles and policy for each Employee, Board of Director, and external candidate traveler and communicates with business event sponsors and organizations in arranging complex travel. 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, 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.



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- Prepares, monitors, and processes a variety of transactional documents, including purchase requisitions, budget requests and transfers, expenditure claims, and personnel/payroll actions.
- 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.
- 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, tracks, and monitors technical, administrative studies and projects concerning Santa Cruz 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

EMPLOYMENT STANDARDS:

Knowledge of:

- Technical principles, practices, and procedures common to public administration, including budgeting, records management, purchasing, 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 percentages and Intermediate statistics.
- Advanced telephone techniques and etiquette.
- 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.



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- Interpret and apply policies, procedures, and Federal State and local regulations to comply with program or project reporting requirements, public outreach, and organize data into functional reports.
- Coordinate and perform technical, administrative activities and meetings in a manner that complies with applicable laws, regulations, and policies.
- Perform meeting minutes in a highly technical setting and transcribe into report format.
- 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 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.
- Review and edit documents for proper grammar, punctuation, and spelling.

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 course work from an accredited college in 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Technical
*Job Series:	Administrative
*Job Series Level:	Advanced
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: OA200
FLSA Status: Non-exempt*

**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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Administrative Supervisor is a supervisor level class in the series. 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 department 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;



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researches and prepares responses as directed; maintain complex files and record-keeping systems.

- Prepares, monitors, and processes a variety of transactional documents, including purchase requisitions, budget requests and transfers, expenditure claims, and personnel/payroll actions.
- Approves time-off request for subordinate staff.
- 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required
- Payroll and timekeeping preparation and backup.

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 percentages, and Intermediate statistics.
- Advanced telephone techniques and etiquette.
- 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.
- 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.
- 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 in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college 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 must have included at least one (1) year of supervisory experience at the administrative level.

Experience in a public agency is desirable.



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LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Technical
*Job Series:	Administrative
*Job Series Level:	Supervisor
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
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*Class Code: P0203
FLSA Status: Non-exempt*

**Assistant Safety and Training Coordinator
Bargaining Unit: PSA**

DEFINITION:

Under direction of the Safety and Training Coordinator, the Assistant Safety and Training Coordinator performs technical and instructional duties related to training and re-training Bus Operators and other Santa Cruz METRO staff in the proper and safe operation of transit buses and other Santa Cruz METRO vehicles in accordance with Federal, State and local laws as well Santa Cruz METRO policies, procedures and labor agreements; assists in the development of curriculum, lesson plans, and training/reference materials; performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Assistant Safety and Training Coordinator is a supervisory level class in the series. An incumbent in this class performs a limited range of delivering required training programs for bus operators and other Santa Cruz METRO staff, performs other technical administrative duties while learning to perform the full scope of the Safety and Training Coordinator level work. This class is distinguished from the Safety and Training Coordinator position because an incumbent in the latter class performs the full scope of Safety and Training Coordinator level of planning, developing, and coordinating the delivery of required training programs for bus operators and other Santa Cruz METRO 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.

- Plans, coordinates and conducts training and re-training programs for Bus Operators and may assist in other department trainings;
- Maintains, updates, and compiles in accordance with Federal and State mandated bus operator programs and Santa Cruz METRO policies, procedures, and labor agreements.
- Assists with developing of and updating curriculum, lesson plans, training schedules and reference materials for Bus Operators, Transit Supervisors, and other Santa Cruz METRO employees; as needed, in conformance with state and federal guidelines and regulations, and with Santa Cruz METRO policies and procedures;
- Provides support to train and coordinate with Transit Supervisors who assist with training and retraining of Bus Operators and other Santa Cruz 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 Operations Manager 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.
- Coordinates activities with Transit Supervisors who are certified to perform DMV exams; maintain related records; participates in CHP/DMV and other audits.



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- 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 and observes driving skills of new Operators and evaluates Trainee Operators
- Provides recommendations regarding Operator retention based on training information;
- Participates 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.
- May performs retraining with fully qualified Bus Operators/Line Instructors as directed or needed.
- Participates in selection of new bus operators.
- Provides period counseling and evaluations.
- Acts as the designated examiner in the testing and certification of Bus Operators.
- Makes recommendations regarding new bus operator retention based on training information.
- Participates in special projects.
- Participates in seminars and workshops as required in relations to the duties and functions of the position.
- Provides information to employees and the public.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drives and Operates Santa Cruz METRO vehicles to perform assignments.
- Performs related work as required
- Responsible for the implementation of ongoing line-instruction program, including selection, training, and evaluation of the line instructor regarding monetary, grading, reporting, and program compliance criteria.
- Conducts verification of transit training (VTT) classes as required and provides customized trainings as required by Operations Manager, Assistant Operations Manager, or Maintenance Manager.
- Participates in development, revision and update of incident and accident investigation procedures and safety procedures
- Maintains record of Santa Cruz METRO accidents; prepares summary reports of accidents; and coordinates the accident review process
- Participates in the planning, organizing, and support of internal and external training activities.
- Provides training in escalated or emergency situations, as assigned.
- Reviews pull-notices and takes appropriate action when required.
- Upon request, provides technical training assistance, pull- notice review for the paratransit department.
- Enforces Santa Cruz METRO rules, policies, and procedures; applies provisions of Labor Agreements within the scope of duties.
- May represent Santa Cruz METRO at disciplinary hearing, legal proceedings, and other meetings, as required
- Under the direction of the Safety and Training Coordinator, incorporates information into training curriculum on new equipment, and changes in existing equipment.
- Communicates with orally with and in writing with Operations and other departments and agencies.
- May serve as a liaison with local emergency responders, such as police and fire, by providing information and orientation regarding Santa Cruz METRO vehicle fleet, fuels utilized, emergency access, and other public safety related information.



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- May participate in committees and projects teams, may make recommendations related to safety, training, licensing requirements, accident investigations, and other position related topics as assigned;
- Serves as hazardous materials trainer for the Operations department.
- May assist with the development of departmental policies, procedures, programs, and budget on safety related issues in cooperation with the Safety, Security, and Risk Department.
- May assist in conducting surveys of other organizations to compile, and analyze data, prepare report and perform calculations, as needed.
- Selects, supervises, trains, motivates, assigns, evaluates, counsels, and disciplines staff.

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 ratios, percentages, and intermediate statistics.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software; including audio/visual equipment.
- Basic mechanical features of transit buses.
- Safety and health related regulations.
- Motivate, train and evaluate staff
- Develop and write plans, procedures, reports, forms and test.
- Conduct field investigations to identify patterns and problems in areas and make recommendations.
- Principles of supervision, training, and employee development.
- Procedures of operator's evaluation, counseling and discipline.

Ability to:

- Provide transit bus operator training in accordance with Federal, State, and local laws as well as Santa Cruz METRO policies, procedures, and labor agreements.
- Read, review and apply laws, regulations and labor contract provisions.
- Instruct others in the safe operation of Santa Cruz METRO vehicles and adapt training procedures to the needs of the individual.
- Develop and write plans, procedures, reports, forms, and tests.



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- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.
- Assist in the development of course curriculum and lesson plans.
- Assist in the development and presentation of customized training.

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 course work from an accredited college.

Additional directly related experience beyond the minimum requirements may be substituted for the required education based on the ration of one and a half (1.5) years of experience for each one (1) year of experience for each one (1) year of education.

AND

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:

A valid California Class “B” Commercial Driver’s License with a “P” passenger endorsement will be required at the time of appointment and throughout employment.

AND

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.



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Upon hire, an employee will be required to successfully complete the Department of Transportation (DOT) transit instruction course.

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 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, bend, kneel, 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 a background check.
- This position is considered a safety sensitive position and requires participation in Santa Cruz METRO’s drug and alcohol testing program.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Technical
*Job Series:	Safety and Training
*Job Series Level:	Supervisor
*Confidential:	No

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

*Class Code: PP103
FLSA Status: Non-exempt*

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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Benefits Technician is a journey-level technical, administrative class in the series. 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,



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contractors, and others; prepares claim forms; monitors employee leave reports for benefit tracking purposes.

- 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 Santa Cruz 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and basic statistics.
- Advanced telephone techniques and etiquette.
- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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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 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.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass a requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Technical
*Job Series:	Benefits Technician
*Job Series Level:	Journey
*Confidential:	Yes



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: PP104
FLSA Status: Non-exempt*

**Buyer
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Buyer 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Buyer is a journey-level class of the series. 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 Santa Cruz 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 Santa Cruz METRO purchasing policies and procedures.
- Reads the terms and conditions applicable to new vendors and flags discrepancies with Santa Cruz METRO purchasing policies.
- Provides training and re-training to various Santa Cruz 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.



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- Operates standard office equipment; utilizes computer software in performing job tasks
- Utilizes standard business software in performing job tasks;
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 ratios, percentages, and intermediate statistics.
- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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:

One (1) year certificate of proficiency from an accredited college 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.



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*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical
*Job Series: Purchasing
*Job Series Level: Journey
*Confidential: No



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

*Class Code: AS107
FLSA Status: Non-exempt*

Claims Technician I Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Claims Technician I performs a limited range of technical duties to support Santa Cruz 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 Santa Cruz METRO Counsel with the determination of Santa Cruz METRO liability; uses established procedures to conduct field investigations of accidents/incidents as well as claims and litigation filed against Santa Cruz METRO; assists with administering settlements and property recovery activities for routine liability claims based on established parameters; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Claims Technician I is the entry/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 Santa Cruz 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 Santa Cruz METRO 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.
- Assists with 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.
- Assists with recovery actions for property damages sustained by Santa Cruz METRO from vehicle accidents, tenant lease agreements, and other related expenses.
- Assists with routine settlements or other actions on litigated and non-litigated claims within established limits; may participate in negotiations.
- May represent Santa Cruz METRO as a witness in small claims court hearings; prepares and provides appropriate information and required documentation.
- Operates field investigation tools including photographic equipment; operates Santa Cruz METRO vehicles, computer programs and equipment, and other office machines.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- 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; utilizes computer software in performing job tasks; operates field investigation tools including photographic equipment.
- Utilizes standard business software in performing job tasks;
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 ratios, percentages, and intermediate statistics.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Understand and refer to 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.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

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. Fieldwork is occasionally required.



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

OTHER CONDITIONS OF EMPLOYMENT:

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

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical
*Job Series: Claims Technician
*Job Series Level: Entry/First working
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS108
FLSA Status: Non-exempt*

**Claims Technician II
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Claims Technician II performs technical duties to support Santa Cruz METRO risk management functions and activities; receives, reviews and processes injury and property damage claims to assist Santa Cruz METRO Counsel with the determination of Santa Cruz METRO liability; uses established procedures to conduct field investigations of accidents/incidents claims and litigation filed against Santa Cruz METRO; administers settlements for routine liability claims based on established parameters; administers property recovery activities; and performs related work as required.

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 Santa Cruz METRO risk management functions and activities.
- Receives, reviews and processes injury and property damage claims to assist in the determination of Santa Cruz METRO 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 Santa Cruz METRO 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 Santa Cruz METRO as a witness in small claims court hearings; prepares and provides appropriate information and required documentation.
- Operates field investigation tools including photographic equipment; operates Santa Cruz METRO vehicles, computer programs and equipment, and other office machines.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- 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; utilizes computer software in performing job tasks; operates field investigation tools including photographic equipment.
- Utilizes standard business software in performing job tasks;
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 ratios, percentages, and intermediate statistics.
- 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.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

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. Fieldwork is occasionally required.



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

OTHER CONDITIONS OF EMPLOYMENT:

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

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical
*Job Series: Claims Technician
*Job Series Level: Journey
*Confidential: No



Santa Cruz METRO

Class Code: SM100
FLSA Status: Non-exempt

Custodial Service Worker Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Custodial Service Worker performs janitorial and related tasks at Santa Cruz METRO facilities; keeps facility interiors and exteriors clean and orderly; performs minor building maintenance duties, and performs related work as required.

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 Santa Cruz 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, light bulbs, 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 Santa Cruz METRO vehicle to perform work assignments.
- Performs related work as required



Santa Cruz METRO

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, and painting, and grounds keeping.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

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, in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



Santa Cruz METRO

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.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally work extended hours or hours outside of regular schedule.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Custodial
*Job Series:	Custodial
*Job Series Level:	Journey
*Confidential:	No

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Santa Cruz METRO

Class Code: OA201
FLSA Status: Non-exempt

Custodial Supervisor Bargaining Unit: SEA

DEFINITION:

Under direction, a Custodial Supervisor performs supervisory and related work to ensure the cleanliness and routine maintenance of Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Custodial Supervisor is the supervisor 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 Santa Cruz 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 Santa Cruz 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.



Santa Cruz METRO

- 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 utilizes computer software in performing job tasks.
- Performs related work as required

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 building 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.
- Communicate clearly and effectively in both oral and written form.
- Intermediate mathematics including percentages, and basic statistics.
- The effective use of modern office equipment, personal computers, and applicable 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.



Santa Cruz METRO

- 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 Santa Cruz METRO software if assigned.
- Drive a Santa Cruz 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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:



Santa Cruz METRO

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 a requisite background check.
- May occasionally work extended hours or hours outside of regular schedule.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Custodial
*Job Series: Custodial
*Job Series Level: Supervisor
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS109
FLSA Status: Non-exempt*

**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 related work as required.

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 and 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 an advanced-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 questions and explains different fare media to customers, photo identification, lost and found, and bus schedule publication and distribution.
- Creates ride reservations for customers in accordance with Americans with Disabilities Act (ADA) guidelines (paratransit eligible customers only) for single and/or multiple trips utilizing paratransit services.; 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 answers public information requests; receives and inputs compliments, complaints, and service improvement suggestions into the customer service database.
- Participates in outreach and public relations activities and may represent Santa Cruz METRO at special events; may assist with the design and preparation of brochures, informational flyers, written articles, and news releases.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Operates a cash register and photography equipment
- Drive a Santa Cruz METRO vehicle to perform assignments
- Performs related work as required



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

EMPLOYMENT STANDARDS:

Knowledge of:

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

Ability to:

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



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.
- Ability to handle conflict resolutions and mediate solutions.

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 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

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

Mental Demands

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

Work Environment:

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



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OTHER CONDITIONS OF EMPLOYMENT:

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

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Customer Service
*Job Series: Customer Service
*Job Series Level: Journey
Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: OA202
FLSA Status: Non-exempt*

**Customer Service Supervisor
Bargaining Unit: SEA**

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; performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Customer Service Supervisor is the supervisor 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 Santa Cruz 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 Santa Cruz 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.
- Basic mathematics including, percentages and basic statistics.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments as required.
- Performs related work as required

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 Santa Cruz METRO customers.
- Santa Cruz 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.
- 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 schedules.
- 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 Santa Cruz METRO vehicle to perform assignments as required.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz 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 in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college in business administration, communications, public relations, or a related field.

AND

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

Previous experience serving as a lead and fluency in Spanish is desirable.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

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

Mental Demands

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

Work Environment:

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



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OTHER CONDITIONS OF EMPLOYMENT:

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

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Customer Service
*Job Series: Customer Service
*Job Series Level: Supervisor
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: T0100
FLSA Status: Non-exempt*

**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 Santa Cruz METRO vehicles and facilities; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Electronic Technician is an advanced level class in the series. An incumbent in this class performs tasks to ensure electronic systems and devices related to Santa Cruz 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 Santa Cruz METRO vehicles and facilities; installs, tests, diagnoses, repairs, and/or removes a variety of 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 Santa Cruz METRO vehicles and in Santa Cruz 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 Santa Cruz 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 Santa Cruz METRO electronic equipment without significantly affecting operations.
- Provide information, assistance, and training to other staff regarding the installation, use, maintenance, and repair of electronic systems and components.
- May oversee and inspect the work of contractors and vendors working on electronic equipment, as assigned.



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- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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.
- Intermediate mathematics, including percentages and intermediate statistics.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Effectively test, diagnose, and perform corrective maintenance on Santa Cruz 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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 course work from an accredited college 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:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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 a 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 Santa Cruz 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.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance
*Job Series: Electronic Technician
*Job Series Level: Advanced
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: OA203
FLSA Status: Non-exempt*

**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 Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Facilities Maintenance Supervisor is the supervisor level class in the series. An incumbent in this class supervises and performs systems maintenance, repair and renovation work for Santa Cruz METRO buildings and facilities to ensure they safe and operational. This class is distinguished from the Lead Facilities Maintenance Worker because an incumbent in the latter class serves as a lead worker over subordinate Facilities 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 Santa Cruz 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 Santa Cruz 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.



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- Prepares technical studies and reports; obtains and renews required permits related to equipment and building operation.
- Represents the department at meetings; may serve as a 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.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 Santa Cruz 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 grounds keeping 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 fractions, percentages, and basic statistics.



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- The effective use of modern office equipment, personal computers, and applicable standard business software.

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 determines the 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 with at least one (1) year in a lead worker capacity is required.

Completion of one (1) year certificate of proficiency from an accredited college in construction technology, business administration, building inspection, energy management, or a related field may be substituted for one (1) year of the required experience.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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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; 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- Required to be able to respond to emergency situations seven days per week, 24 hours per day.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Facilities
*Job Series:	Facilities Maintenance
*Job Series Level:	Supervisor
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SC100
FLSA Status: Non-exempt*

**Facilities Maintenance Worker I
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Facilities Maintenance Worker I performs unskilled, semi-skilled, and some-skilled tasks maintenance, repair, and construction of Santa Cruz METRO facilities and properties; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Facilities Maintenance Worker I is the entry/first working level class in the series. An incumbent in this class performs a limited range of unskilled, semi-skilled and some 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 II 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, semi-skilled and some skilled tasks related to the maintenance and repair of Santa Cruz 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
- Performs minor electrical repairs
- 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; operates vehicles such as dump trucks, truck mounted cranes and forklifts.
- Performs related work as required.



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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 grounds keeping 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 percentages and basic statistics.
- 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 Santa Cruz METRO software if assigned.
- 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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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 work extended hours or hours outside of regular schedule.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Facilities
*Job Series:	Facilities Maintenance
*Job Series Level:	Entry/First working
*Confidential:	No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SC101
FLSA Status: Non-Exempt*

**Facilities Maintenance Worker II
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Facility Maintenance Worker II performs semi-skilled and skilled tasks related to the maintenance, repair, and construction of Santa Cruz METRO facilities, properties, and related equipment; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Facilities Maintenance Worker II 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 Worker I 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 Lead 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 Santa Cruz 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 equipment.
- Monitors and maintains secondary storage systems including above-ground waste storage and hazardous materials storage; pumps out waste collection systems; collects storm water runoff samples for hazardous testing.
- Offloads Compressed Natural Gas (CNG) and diesel fuel from trucks to Santa Cruz 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.



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- 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.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

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 grounds keeping 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 fractions.
- Communicate clearly and effectively in oral and written Form.
- 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.



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- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz 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 experience equivalent to a Facilities Maintenance Worker I.

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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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 work 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.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Facilities
*Job Series:	Facilities Maintenance
*Job Series Level:	Journey
*Confidential:	No



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*Class Code: P0205
FLSA Status: Exempt*

Financial Analyst Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Financial Analyst performs a range of journey-level professional analytical duties related to centralized Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Financial Analyst is the journey-level class in the series. An incumbent in this class performs a range of journey level professional financial analytical duties while learning to perform the full scope of financial analytical work. This class may be distinguished from the higher level class of Senior Financial Analyst because an incumbent in the latter class performs the full scope of advanced 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 range of journey-level professional analytical duties to support centralized Santa Cruz METRO budgetary and other financial functions, processes, and projects, while learning to perform the full scope of advanced level financial analytical work.
- Participates in the annual organization wide budget process; assists in gathering 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 Santa Cruz METRO's five and ten year Strategic Plan; assists in researching, analyzing, and summarizing 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 Santa Cruz METRO's actual revenues and expenses in relation to the adopted operating and capital budgets.
- Assists in administering Santa Cruz 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.



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- Calculates pay rates for all bargaining units and management classes for purposes of labor negotiations, wage surveys, and classification and compensation studies;
- Assist in preparing operating cost effects 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.
- Assists with special projects.
- Develops and maintains a wide variety of financial records, reports, reporting tools and other documents; prepares correspondence;
- May present to individuals and groups.
- Provides information to employees and the public.
- Operates standard office equipment; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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
- 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 percentages, intermediate statistics, and financial data conventions.
- The effective use of modern office equipment, personal computers, and standard business software, including specialized financial applications.



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Ability to:

- Plan, organize, coordinate, prepare, and control budgets.
- Perform a wide variety of intricate, 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 intricate 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
- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

SPECIAL REQUIREMENTS:

- Must maintain the strictest confidentiality of information.
- May require occasional travel.



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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Financial Professional
*Job Series:	Financial Analyst
*Job Series Level:	Journey
*Confidential:	No



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*Class Code: OA204
FLSA Status: Non-exempt*

**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 Santa Cruz METRO vehicles and equipment; supervises and evaluates Fleet Maintenance staff; coordinates and develops safety and training programs for department; develops, implements and supervises department record keeping and information systems; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Fleet Maintenance Supervisor is a supervisory level class. An incumbent in this class supervises, performs, and coordinates fleet maintenance repair, and renovation work for Santa Cruz METRO vehicles to ensure that they are in a safe, clean, and operational 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.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; 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 Santa Cruz 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 Santa Cruz 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 and equipment; monitors vehicle failure trends and suggests corrective actions as needed.
- Solicits and receives quotes from outside vendors as needed to complete jobs.
- Monitors budgets; assists in departmental planning by projecting expenditures and determining staffing needs.



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- Assists 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 a 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; create spreadsheets and other tools to track information.
- Type correspondence and other documents; answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related works as required.

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 percentages and basic statistics.
- 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 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 equipment and/or alternative fuel mechanic repair work, rebuilding heavy-duty engines, and related components.

AND

Three (3) years of supervisory or lead experience

Two (2) years course work from an accredited college in business, transit management, hazardous materials technology, industrial technology, and/or behavioral science is desirable.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.



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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 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 aided 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 a 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 Santa Cruz 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.
- May occasionally work extended hours or hours outside of regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Maintenance
*Job Series:	Maintenance
*Job Series Level:	Supervisor
*Confidential:	No



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*Class Code: P0207
FLSA Status: Non-exempt*

**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; performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Grants/Legislative Analyst is a journey-level professional analyst class in the series. 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 Santa Cruz 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 Santa Cruz METRO; trains staff of sub-recipients regarding grant procedures and requirements; reviews submittals from sub-recipients and determines compliance with grant requirements.



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- 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.
- Provides grant-specific training and support to the department.
- Researches, monitors, and reviews legislation, laws, rules, and regulations to ensure Santa Cruz METRO compliance and recommend appropriate action.
- Oversees and coordinates the department's legislative agenda and works with management for input and needs.
- Represents Santa Cruz 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 Santa Cruz 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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.



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- Intermediate mathematics, including percentages and intermediate statistics.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 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.



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LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- Must participate in professional development activities.
- May occasionally work extended hours or hours outside of the regular schedule.
- May require occasional travel.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Professional
*Job Series:	Grants
*Job Series Level:	Journey
*Confidential:	No



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

*Class Code: AS111
FLSA Status: Non-exempt*

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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Human Resources Clerk is a journey-level clerical class in the series. 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



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- May coordinate employee medical exams and assist with employee orientations.
- May verify applicant identity and employment eligibility by gathering and reviewing documentation.

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 percentages and basic statistics.
- Telephone techniques and etiquette.
- 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 40 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 in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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:

One (1) year of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining detailed recordkeeping systems.

LICENSES AND CERTIFICATES:

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

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

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Clerical
*Job Series:	HR Clerical
*Job Series Level:	Journey
*Confidential:	Yes

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

Class Code: AS112
FLSA Status: Non-exempt

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; performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Human Resources Specialist is an advanced level clerical class in the series. 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 Santa Cruz 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 Santa Cruz 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 Santa Cruz METRO Human Resources Information System (HRIS); maintains information related to personnel actions such as



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change of status, hours worked, performance reviews, step advancements, and other HR activities.

- Assists in conducting recruitment and testing activities; responds to inquiries regarding job openings and recruitment status; assists in maintaining employee benefit records 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and basic statistics.
- Telephone techniques and etiquette.
- 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.



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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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work in organizational development from an accredited college

AND

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.

SHRM certification a plus.

Experience reviewing and processing workers' compensation claims is desirable.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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.



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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; 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 a requisite background check.
- Must maintain strict confidentiality of work related information.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical
*Job Series: HR Clerical
*Job Series Level: Advanced
*Confidential: Yes



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

*Class Code: PP105
FLSA Status: Non-exempt*

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; performs related work as required.

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 Principle Human Resources Generalist because an incumbent in the latter class performs advanced 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.
- May assist 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.



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- 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, 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and intermediate statistics.
- Advanced telephone techniques and etiquette.
- 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.



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- Maintain confidentiality of materials, records, files, and other privileged information using tact and discretion.
- 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 in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work in organizational development from an accredited college 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.

SHRM certification a plus.

Experience in a public agency is desirable.

Experience performing employee recruitment activities is desirable.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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



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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 a requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical
*Job Series: HR Technical
*Job Series Level: Journey
*Confidential: Yes



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: T0101
FLSA Status: Non-exempt*

**Information Technology Support Analyst I
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Information Technology Support Analyst I 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Information Technology Support Analyst 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 operating 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 minor procedures and related administrative tasks.



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- Creates, changes, maintains, data in ITS systems, including installation, configuration, troubleshoot, data creation, builds images, and deployment.
- Assists with maintaining, monitoring, and supporting transit ticketing systems, including hardware, installations, upgrades, equipment, and applications.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

EMPLOYMENT STANDARDS:

Knowledge of:

- Workplace safety issues related to the use of computers.
- Basic Microsoft Windows
- Basic TCP/IP and networking
- Basic Microsoft Office application software, including Word and Excel.
- Basic knowledge of NIX operating systems.
- Basic computer and networking hardware
- Basic remote access technologies.
- Basic anti-virus technologies.
- Basic security protocols.
- Workplace safety issues related to the use of computers
- Basic mathematics, including percentages and basic statistics.
- The effective use of modern office equipment, personal computers, and standard business software.

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 basic 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.
- Install computer hardware and software
- Provide helpdesk support for desktop application
- Utilize helpdesk tracking systems
- Work with users and co-workers on one-on-one or small group informal bases to demonstrate application and or business processes.

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 certification of proficiency from an accredited college in computer science.

AND /OR

Two (2) years of technical computer support experience.

Experience providing customer support using a help desk ticket tracking system is desirable.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- May occasionally work extended hours or hours outside of regular the schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Information Technology Technical
*Job Series:	Information Technology Support Analyst
*Job Series Level:	Entry/First working
*Confidential:	No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: T0102
FLSA Status: Non-exempt*

**Information Technology Support Analyst II
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, an Information Technology Support Analyst II 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Information Technology Support Analyst 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 Support Analyst 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 operating systems, and networks; performs routine configuration maintenance; troubleshoots routine operation and configuration issues and tests system stability; performs reset, recovery and backup procedures.



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- Assists third party vendors with installations, upgrades, and application maintenance; helps with application troubleshooting, diagnostics, communication, and resolution.
- Maintains, monitors, and supports transit ticketing systems including hardware, installations, upgrades, equipment, and applications.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.
- Assists with minor procurements and related administrative tasks
- Creates, changes, maintains Data in ITS systems, including installations, configurations, troubleshoot, data creation, building images, and deployment.

EMPLOYMENT STANDARDS:

Knowledge of:

- Microsoft Windows
- Basic TCP/IP Networking Microsoft Office application software, including Word and Excel.
- Basic knowledge of NIX operating systems.
- Current computer and networking hardware.
- Workplace safety issues related to the use of computers.
- Remote access technologies.
- Anti-virus technologies.
- Security protocols.
- Basic mathematics, including percentages and basic statistics.
- The effective use of modern office equipment, personal computers, and standard business software

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 basic 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Install computer hardware, software, and upgrades
- Provide helpdesk support for desktop applications.
- Utilize helpdesk ticketing systems
- Work with users and co-workers on a one-on-one or small group informal basis to demonstrate applications and/or business processes
- 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 course work from an accredited college in computer science.

AND/OR

Four (4) years of technical computer support experience.

Experience must have included at least two (2) years providing customer support using a help desk ticket tracking system.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- May occasionally-work extended hours or hours outside of regular the schedule.



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Information Technology Technical
*Job Series: Information Technology Support Analyst
*Job Series Level: Journey
*Confidential: No



Santa Cruz METRO

Class Code: SM101
FLSA Status: Non-exempt

Lead Custodial Service Worker Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Lead Custodial Service Worker performs lead work as well as janitorial and related tasks at Santa Cruz METRO facilities; ensures that facility interiors and exteriors are clean and orderly; performs minor building maintenance duties; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Lead Custodial Service Worker is the advanced-lead 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 Santa Cruz 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 Santa Cruz 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, grounds or related facility maintenance and 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.



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- Conducts safety checks by checking for locked doors, temperature readings for heating and air conditioning, and on/off switches for machines.
- Ensures safe usage of chemical cleaning materials in compliance with Santa Cruz 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, utilizes computer software in performing job tasks.
- Performs related work as required

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, painting, and landscaping activities.
- Basic operation and maintenance of heating and ventilating equipment.
- Standard tools, terminology, and practices used in skilled building trades
- Time management techniques.
- Basic mathematical skills to create proper dilutions of cleaning products.
- The effective use of modern office equipment, personal computers, and applicable 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.



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- 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.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Drive a Santa Cruz METRO vehicle to perform assignments as required.
- Communicate clearly and effectively in both oral and written form
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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.



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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 work extended hours or hours outside of regular schedule
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Custodial
*Job Series: Custodial
*Job Series Level: Advanced – Lead
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SC102
FLSA Status: Non-exempt*

**Lead Facilities Maintenance Worker
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Lead Facilities Maintenance Worker performs lead work as well as semi-skilled and skilled tasks related to the maintenance, repair, and construction of Santa Cruz METRO facilities, properties, and related equipment; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Lead Facilities Maintenance Worker is the advanced-lead 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 II 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 Santa Cruz 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 equipment.
- Monitors and maintains secondary storage systems including aboveground waste storage and hazardous materials storage; pumps out waste collection systems; collects storm water runoff samples for hazardous testing.
- Offloads Compressed Natural Gas (CNG) and diesel fuel from trucks to Santa Cruz METRO fueling facilities; monitors fuel station; implements emergency procedures for spill recovery as required.



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- 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.
- 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.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 grounds keeping 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 percentages and basic statistics
- 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 determines the materials and equipment needed to make building and equipment repairs.
- Use manual and power tools and equipment safely.
- Make quick decisions in an emergency.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 II.

OR

Two (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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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



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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 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Facilities
*Job Series: Facilities Maintenance
*Job Series Level: Advanced - Lead
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SC106
FLSA Status: Non-exempt*

**Lead Mechanic
Bargaining Unit: VMU**

DEFINITION:

Under general supervision, a Lead Mechanic performs lead work and skilled maintenance work related to the repair, alteration, and service of Santa Cruz 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 Santa Cruz METRO buses, vehicles, and related fleet equipment and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Lead Mechanic is the advanced- 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 Mechanic 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.

- All duties of Mechanic I, Mechanic II and Mechanic III positions.
- 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 Santa Cruz 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 Santa Cruz 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.



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- 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 Santa Cruz METRO equipment including gasoline, diesel, and CNG vehicles.
- Maintains Santa Cruz 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.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and basic statistics.
- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 responsible experience equivalent to a Mechanic III.

OR

Three (3) years of progressively responsible experience equivalent to a Mechanic II.

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:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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.



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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 80 pounds aided 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 a 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 Santa Cruz 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.
- May occasionally work extended hours and hours outside of regular schedule.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance
*Job Series: Mechanic
*Job Series Level: Advanced-Lead
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS106
FLSA Status: Non-exempt*

**Lead Parts and Materials Clerk
Bargaining Unit: VMU**

DEFINITION:

Under general supervision, a Lead Parts and Materials Clerk performs lead work and maintenance support work related to requisitioning, receiving, inspecting, identifying, researching, stocking and issuing of a variety of parts, equipment, tools, materials and supplies, including highly specialized items for vehicle maintenance and repairs, facilities maintenance and repairs and custodial activities; oversees the maintenance of appropriate inventory; performs record keeping and other administrative support work; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Lead Parts and Materials Clerk is the advanced-lead level class in the series. An incumbent in this class serves as a lead worker over subordinate Parts and Materials Clerks and also performs tasks requiring advanced knowledge of heavy-duty transit vehicles maintenance, repairs and storekeeping and purchasing methods as well as related departmental policies, practices, and procedures. This class may be distinguished from the lower level class of Parts and Materials 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 Parts and Materials Clerk 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.
- Performs researching, requisitioning, receiving, inspecting, stocking and issuing of a variety of materials and supplies requested by multiple departments, including specialized parts, equipment, and tools for vehicle maintenance and repairs, facilities maintenance and repairs, and custodial activities.
- Monitors the “out of service” list and updates work orders to show status of orders; provides an estimated time of arrival.
- Assists Parts and Materials staff and other 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 Santa Cruz METRO policies.
- Prepares budgetary estimates for parts, materials, and supplies.
- Contacts vendors to obtain pricing and availability quotations.



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- 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.
- Ensures the maintenance and currency of Fleet and Facilities Department's Safety Data Sheet (MSDS) records, ensuring that items used or purchased by Fleet and Facilities Departments are in the SDS catalog; Leads and participates in a yearly SDS inventory.
- Performs the monitoring of accumulated metal, hazardous waste, and other items and arranges pick-up for disposal.
- Performs the packaging and shipping of items needing repair or warranty work.
- Performs the inspections of forklifts and other equipment to verify safe operation.
- Performs the loading and unloading mobile vaults from an armored car containing revenue
- Participates in keeping the parts room clean and orderly.
- 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; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 department needs, 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 percentages and basic statistics.
- Telephone techniques and etiquette.



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- 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.
- Lead and participate in the identification and procurement of a wide variety of [highly specialized] tools, equipment, parts, supplies and other items requested by customers.
- Research the availability and price of requested items.
- Read and comprehend a variety of [highly specialized] technical parts manuals, schematics, and safety-related documentation.
- Coordinates 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 Santa Cruz METRO software if assigned.
- Drive a forklift after receiving appropriate training.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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



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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 a requisite background check.
- May occasionally working extended hours or hours outside of regular schedule.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Purchasing
*Job Series:	Parts
*Job Series Level:	Advanced-Lead
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SM105
FLSA Status: Non-exempt*

**Lead Vehicle Service Worker
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Lead Vehicle Service Worker performs lead work 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Lead Vehicle Service Worker is the advanced – lead level class in the series. An incumbent in this class leads, coordinates, and performs a variety of tasks to ensure that Santa Cruz 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 Santa Cruz 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.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Operates standard office equipment; utilizes computer software in performing job tasks.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Automotive maintenance nomenclature.
- Safe work practices.



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- Proper use of lubricants and fuels.
- 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 percentages and basic statistics.
- 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 Santa Cruz 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.
- Operates standard office equipment; utilizes computer software in performing job tasks and learn to use specialized Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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.



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LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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 a background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally work extended hours or hours outside of the regular schedule.
- This position is considered a safety sensitive position and requires participation in Santa Cruz 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.



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*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance
*Job Series: Vehicle Service
*Job Series Level: Advanced - Lead
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS114
FLSA Status: Non-exempt*

**Legal Secretary
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Legal Secretary performs specialized clerical and secretarial work; prepares and processes legal documents, obtains or provides confidential information; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Legal Secretary is a journey-level class in the series. 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and basic statistics.
- Telephone techniques and etiquette.
- 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, timelines, and deadlines.
- 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 in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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.



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LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- Must maintain strict confidentiality of work-related information.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Legal Clerical
*Job Series: Legal Sec
*Job Series Level: Journey
*Confidential: Yes

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SC103
FLSA Status: Non-exempt*

**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 Santa Cruz 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 related work as required

DISTINGUISHING CHARACTERISTICS:

Mechanic I is the entry/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, and trucks and other Santa Cruz 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 Santa Cruz METRO equipment including gasoline, diesel, and Compressed Natural Gas (CNG) vehicles.



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- Maintains Santa Cruz METRO property, tools, and equipment used in vehicle maintenance.
- Maintains a clean work area.
- 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; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and basic statistics.
- 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.



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- Make quick decisions in an emergency.
- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 Santa Cruz METRO standards) AND six (6) months of experience performing mechanic work.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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.



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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 80 pounds aided 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 a 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 Santa Cruz 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.
- May occasionally work extended hours or hours outside of regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Maintenance
*Job Series:	Mechanic
*Job Series Level:	Entry/First Working
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SC104
FLSA Status: Non-exempt*

**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 Santa Cruz METRO buses, vehicles, and other equipment; provides technical direction and assistance to lower level staff; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Mechanic II is the journey-level class in the series. An incumbent in this class performs a wide range of moderately to 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 engine overhaul in frame repair 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.

- All duties of Mechanic I position
- Performs a variety of skilled tasks in the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other Santa Cruz 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 Santa Cruz METRO equipment including gasoline, diesel, and CNG vehicles.
- Maintains Santa Cruz METRO property, tools, and equipment used in vehicle maintenance.
- Maintains a clean work area.
- Maintains accurate written and electronic records, logs and work orders.



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- 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; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and basic statistics.
- 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.



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- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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.

OR

Graduation from a certified maintenance training program approved to Santa Cruz METRO standards **AND** one (1) year of experience performing mechanic duties.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "B" license with "P" Passenger endorsement.

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.



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Santa Cruz METRO**

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 aided 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 a 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 Santa Cruz 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.
- May occasionally work extended hours or hours outside of regular schedule.

*Adopted: 12-11-18
 *BOD Approved: 00-00-00
 *Revised: 00-00-00
 *Job Family: Maintenance
 *Job Series: Mechanic
 *Job Series Level: Journey
 *Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SC105
FLSA Status: Non-exempt*

**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 Santa Cruz METRO buses, vehicles, and other equipment; provides technical direction and assistance to lower level staff; and performs related work as required.

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.

- All duties of Mechanic I and Mechanic II positions.
- Performs a variety of highly skilled and difficult tasks in the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other Santa Cruz 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 Santa Cruz METRO equipment including gasoline, diesel, and CNG vehicles.
- Maintains Santa Cruz 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.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and basic statistics.
- 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.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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 aided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

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 a 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 Santa Cruz 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.
- May occasionally work extended hours or hours outside of regular schedule.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance
*Job Series: Mechanic
*Job Series Level: Advanced
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: PP106
FLSA Status: Non-Exempt*

**Paralegal I
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Paralegal performs legal, technical work for the department manager and General Counsel; assists in preparing for litigation; performs legal research; interviews witnesses; assists with the preparation of legal documents; and performs related work as required.

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 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 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 Santa Cruz METRO witnesses for depositions; prepares deposition summaries.
- Confers with Santa Cruz METRO Counsel, investigators, employees, and other individuals regarding legal matters.
- Attends court and other legal forums with Santa Cruz 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

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.
- 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 percentages and basic statistics.
- Telephone techniques and etiquette.
- 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 Santa Cruz 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.
- Use good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

MINIMUM QUALIFICATIONS:

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

Education, Training, and Experience:

Associates Degree from an accredited college in Paralegal Studies.

AND

Two (2) years of experience as a paralegal, legal assistant or legal secretary.

LICENSES AND CERTIFICATES:

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

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

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- Must maintain strict confidentiality of work related information.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Legal Technical
*Job Series:	Paralegal
*Job Series Level:	Journey
*Confidential:	Yes

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: PP107
FLSA Status: Non-exempt*

**Paralegal II
Bargaining Unit: SEA**

DEFINITION:

Under direction, a Paralegal II performs advanced and specialized legal, technical work for the Chief Executive Officer, General Counsel, and Department Managers by assisting with complex functions while also providing advanced support for litigation and related legal matters; assists with administering workers' compensation, employee leaves; assists General Counsel in preparing for litigation by performing legal research, interviewing witnesses and preparing legal documents, and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Paralegal II is the advanced level class in the series. An incumbent in this class performs advanced and specialized technical legal activities requiring knowledge of complex functions, policies and procedures as well as general paralegal processes. This class is distinguished from the lower level class of Paralegal I 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 leaves, workers compensation documentation; drafts correspondence and prepares reports and documentation for employee leaves.
- Assists and acts as liaison in monitoring workers' compensation cases from inception to final disposition.
- Tracks and maintains union contracts, management compensation plan changes, and side agreement.
- May assist in tracking and processing employee COBRA eligibility.
- Administers Santa Cruz METRO's Lactation Accommodation Program.
- Processes records requests according to the California Public Records Act; responds to Title II/Title VI/ADA/504 complaints; communicates and coordinates legal inquiries and document subpoenas.
- Drafts and files complex legal documents; confer with the CEO, General Counsel, and Department Managers regarding legal matters; researches, and studies, statutes, case law, legislation, and other legal authorities
- Assists with legal matters related to CalTIP claims and the Disadvantaged Business Enterprise (DBE) Program.
- May assist with preparing departmental budgets; may assist in maintaining information in the Human Resources Information System (HRIS).
- Prepares training materials and presentations to management; prepares staff reports for board meetings and drafts resolutions.
- Operates standard office equipment; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



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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 electronic 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.
- Advanced mathematics, including percentages and advanced statistics
- Telephone techniques and etiquette.
- The effective use of modern office equipment, personal computers, and standard business software.

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 Santa Cruz METRO employees regarding discovery, case investigation, and trial preparation.
- Interpret, explain, and apply legal 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

MINIMUM QUALIFICATIONS:

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

Education, Training, and Experience:

Bachelor’s degree from an accredited college and a certificate in Paralegal Studies.

AND

Four (4) years of legal experience as a paralegal, legal assistant, or legal secretary.

LICENSES AND CERTIFICATES:

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

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

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- Must maintain strict confidentiality of work-related information.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Legal Technical
*Job Series:	Paralegal
*Job Series Level:	Advanced
*Confidential:	Yes

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS115
FLSA Status: Non-exempt*

**Paratransit Eligibility Coordinator
Bargaining Unit: SEA**

DEFINITION:

Under general direction, the Paratransit Eligibility Coordinator performs professional duties related to Americans with Disabilities Act (ADA) paratransit eligibility functions; determines customer eligibility for Santa Cruz METRO paratransit services; conducts outreach to and educates the community, potential applicants and their families regarding available Santa Cruz METRO paratransit and accessible services, consistent with the transportation provisions of the ADA; coordinates the ADA Paratransit Certification program; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Paratransit Eligibility Coordinator is a journey-level class in the series. An incumbent in this class performs tasks related to Santa Cruz 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 Santa Cruz METRO paratransit services including passenger certification, appeals, and recertification services in compliance with legal requirements and Santa Cruz 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 Santa Cruz METRO guidelines.
- Produces periodic statistical summaries and analytical reports for Santa Cruz 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 Santa Cruz 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.



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- Reviews and makes appropriate determinations on immediate needs certification and other special requests as needed.
- 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; utilizes computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages, and basic statistics.
- Principles and practices of effective training.
- Telephone techniques and etiquette.
- The effective use of modern office equipment, personal computers, and standard business software.



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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.
- 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 Santa Cruz 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 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.



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LICENSES AND CERTIFICATES:

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

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

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- Must participate in professional development activities.
- May occasionally work extended hours or hours outside of the regular schedule.
- May require occasional travel.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Transit Operations Professional
*Job Series:	Paratransit Eligibility Coordinator
*Job Series Level:	Journey
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: OA205
FLSA Status: Exempt*

**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, identifying, researching, stocking and issuing of a variety of parts, equipment, tools, materials and supplies, including highly specialized items for vehicle maintenance and repairs, facilities maintenance and repairs and custodial 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

The Parts and Materials Supervisor is the supervisor level class in the series. An incumbent in this class is responsible for supervising subordinate staff that requisition, receive, inspect, identify, research, stock, and issue a variety of parts, equipment, tools, materials, and supplies for multiple Santa Cruz 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 Lead Parts and Materials Clerk because an incumbent in the latter class serves as a lead worker over subordinate Parts and Materials 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 Santa Cruz 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 all parts core programs; arranges shipment back to vendors and follows up with vendors to get core credits.
- Administers and oversees Santa Cruz METRO's MSDS program for Fleet and Facilities departments; ensures that all chemicals received and purchased are entered into the system.
- Participates in the daily work of requisitioning, receiving, inspecting, identifying, researching, stocking and issuing materials and supplies and performing other Parts and Materials Clerk/Lead Parts and Materials 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; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

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 department needs, 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.
- Advanced mathematics including, percentages and advanced statistics.
- Telephone techniques and etiquette.
- 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 Santa Cruz METRO software if assigned.
- Drive a forklift after receiving appropriate training.
- Communicate clearly and effectively, in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college, 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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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; 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Purchasing
*Job Series: Parts
*Job Series Level: Supervisor
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS105
FLSA Status: Non-exempt*

**Parts and Materials Clerk
Bargaining Unit: VMU**

DEFINITION:

Under general supervision, a Parts and Materials Clerk performs skilled maintenance and clerical support duties related to requisitioning, receiving, inspecting, identifying, researching, stocking and issuing of a variety of parts, equipment, tools, materials and supplies including highly specialized items for vehicle maintenance and repairs, facilities maintenance and repairs, and custodial activities; assists departments in identifying the correct items to be purchased; performs daily checks and balances as well as weekly group inventories; may perform general office work, and performs related duties as required.

DISTINGUISHING CHARACTERISTICS:

Parts and Materials Clerk is the journey-level class in the series. An incumbent in this class performs tasks of various difficulty that require a moderate knowledge of heavy and light duty vehicles, storekeeping and purchasing methods as well as related departmental policies, practices, and procedures. This class may be distinguished from the higher level class of Lead Parts and Materials Clerk because an incumbent in the latter class serves as an advanced-lead worker over subordinate Parts and Materials 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.

- Requisitions, receives, inspects, stocks, and issues a variety of materials and supplies requested by multiple departments, including specialized parts, equipment, and tools for vehicle maintenance and repairs, facilities maintenance and repairs, and custodial 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 Santa Cruz METRO policies; issues items to departments.
- Receives, inspects and stocks deliveries from suppliers; compares actual items received against orders to confirm the 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.
- Assists with workplace safety regulatory compliance such as the Material Safety Data Sheet (MSDS) program for Fleet and Facility Maintenance.
- Monitors accumulated metal, hazardous waste and other items and notifies superior of need for disposal and assists with the disposal process
- Packages and ships items needing repair or warranty work.
- Inspects forklifts and other equipment to verify safe operation.
- Loads and unloads mobile vaults on and off armored cars as needed.
- Maintains the parts room in a clean and orderly fashion.

Parts and Materials Clerk

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- 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; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related duties as required.

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 department needs, 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.
- Intermediate methods of maintaining information in digital or hard copy files.
- Intermediate clerical methods of researching, gathering, organizing and reporting data.
- Intermediate-methods of prioritizing, planning, and organizing work.
- Intermediate time management techniques.
- Intermediate clerical customer service techniques.
- Intermediate mathematics including percentages and intermediate statistics.
- Telephone techniques and etiquette.
- 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 Santa Cruz METRO software if assigned.
- Drive a forklift after receiving appropriate training.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 an inventory of automotive and heavy-duty transit parts and supplies.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.

Parts and Materials Clerk

9-15B.181



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- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Purchasing
*Job Series: Parts
*Job Series Level: Journey
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS116
FLSA Status: Non-exempt*

**Payroll Specialist
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Payroll Specialist performs technical administrative work related to timekeeping and payroll functions for a single Santa Cruz 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 related work as required

DISTINGUISHING CHARACTERISTICS:

Payroll Specialist 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 Specialist because an incumbent in the latter class has overall responsibility for organization wide payroll processing and administers payroll activities affecting all Santa Cruz 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 Santa Cruz 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.
- Identifies, develops, recommends, and implements 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 administrative activities; 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.



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- Operates standard office equipment; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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.
- Methods of researching, gathering, organizing, and reporting data.
- Methods of prioritizing, planning, and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics, including percentages and basic statistics.
- Telephone techniques and etiquette.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.



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Santa Cruz METRO**

- 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 certificate of proficiency from an accredited college, 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- Must maintain strict confidentiality of work related information.
- May occasionally work extended hours or hours outside of the regular schedule.



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Santa Cruz METRO**

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Payroll
*Job Series: Payroll Specialist
*Job Series Level: Journey
*Confidential: No



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

Class Code: P0202
FLSA Status: Non-exempt

Planning 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 Santa Cruz 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 work as required.

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 Santa Cruz 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 Santa Cruz 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 Santa Cruz 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; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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.



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- Basic mathematics, including percentages and basic statistics.
- Telephone techniques and etiquette.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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.



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Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

Does occasional fieldwork.

OTHER CONDITIONS OF EMPLOYMENT:

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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Planning Clerical
*Job Series:	Planning Aide
*Job Series Level:	Entry/First working
*Confidential:	No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: P0211
FLSA Status: Non-exempt*

**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 related work as required.

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 Santa Cruz METRO staff, board members, the public, and other agencies.
- Operates standard office equipment; utilizes computer software in performing job tasks.



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- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 ratios, percentages, and intermediate statistics.
- 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.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.



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- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- Must participate in professional development activities.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Professional Administrative
*Job Series: Planning Data Analyst
*Job Series Level: Journey
*Confidential: No



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

Class Code: P0212
FLSA Status: Non-exempt

Principal HR Generalist Bargaining Unit: SEA

DEFINITION:

Under general direction, a Principle Human Resource Generalist performs 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 Santa Cruz METRO management on personnel-related issues; performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Principle Human Resource Generalist is an advanced level class in the series. 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 analytical duties to support HR functions and processes and Human Resource Information System (HRIS) development and administration;
- Assists Human Resources Management in planning, organizing, and achieving departmental objectives;
- Assist Santa Cruz METRO management on personnel-related issues.
- Coordinates with Information Technology (IT), Finance and Payroll to ensure that HRIS data is appropriately reported_maintained and updated and integrating properly with other systems;
- Performs HRIS audits to identify and resolve deficiencies;
- Communicates end user requirements to the HRIS vendor as well as IT staff; trains HR staff and HRIS end users
- Prepares and administers the HR budget and process expenditures.
- Assists in planning, administering, and implementing Santa Cruz METRO's Equal Employment Opportunity Plan.
- Evaluates operational effectiveness and efficiency; recommend changes as needed;
- Ensure compliance with industry standards and legal requirements;
- May assist in developing HR policies and procedures.
- Process step increase and longevity pay; ensure compliance of payable with collective bargaining agreements;
- Process compensation changes, personnel action documents and route for approval into HRIS;
- May develop and conduct recruitment and related outreach activities
- May assists with conducting job analyses, evaluations and classification studies;
- May write classification specifications and conducts salary surveys;



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- May assist in performing 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 Technician position
- Operates standard office equipment; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required
- Provide staff training as needed

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
- Laws and regulations applicable to public human resources management.
- Principles of pay equity and compensation management.
- Analytical methods of researching, gathering, organizing and reporting data.
- Modern office practices, procedures and equipment
- 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 percentages and intermediate statistics.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Analyze, interpret, explain, and implement human resources policies, regulations and requirements.
- Solve complex problems and develop solutions using analytical techniques.
- Plan, organize and/or prepare research and analytical studies
- Research, collect, analyze and interpret data and prepare comprehensive reports of findings and recommendations.
- Provide effective and responsive customer service, including in stressful situations.
- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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 in occupational development 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.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

Certified Professional (CP) or Senior Certified Professional (SCP) from a recognized Human Resource Certification organization preferred.

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.



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Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- May require occasional travel.
- Must maintain strict confidentiality of work-related information.
- Must participate in professional development activities.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Professional
*Job Series: HR Generalist
*Job Series Level: Advanced
*Confidential: Yes



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

*Class Code: P0213
FLSA Status: Non-exempt*

Purchasing Agent Bargaining Unit: SEA

DEFINITION:

Under direction, a Purchasing Agent performs advanced lead 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Purchasing Agent is an advanced lead level class in this series. 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 Santa Cruz 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 Santa Cruz 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 Santa Cruz METRO policies; assists in the development of Santa Cruz 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 Santa Cruz METRO.
- 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 lead the work of subordinate technical or clerical staff as an ancillary duty.
- Provides information to employees and the public.
- Operates standard office equipment; utilizes computer software in performing job tasks
- Utilizes standard business software in performing job tasks;
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 ratios, percentages, and intermediate statistics.
- 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.



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- Perform professional purchasing activities in a manner that complies with applicable laws, regulations, and policies.
- Review requisitions and prepare product specifications, bids, and agreements.
- Evaluate quotations and bids and make awards consistent with Santa Cruz 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 the work of subordinate technical or clerical staff.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 in public administration, business administration, accounting, or a related field.

AND

Two (2) years' experience in performing technical purchasing work, preferably at a public agency.

Experience, which demonstrates substantial knowledge and abilities pertinent to specific purchasing job functions, may be substituted for the required education on a year-for-year basis.

OR

One (1) year certificate of proficiency from an accredited college in public administration, business administration or a comparable field of coursework.

AND

Four (4) years of experience performing professional purchasing work, preferably in a public agency.

NTI procurement series completed or ability to complete within the first year of employment.



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LICENSES AND CERTIFICATES:

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

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

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

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

Mental Demands

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

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- Must participate in professional development activities.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Professional
*Job Series:	Purchasing
*Job Series Level:	Advanced-Lead
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: PP108
FLSA Status: Non-exempt*

**Purchasing Assistant
Bargaining Unit: SEA**

DEFINITION:

Under direction, a Purchasing Assistant performs advanced clerical and technical duties to support complex departmental administrative or operational activities, with an emphasis on purchasing and contract administration; researches, gathers, organizes, and prepares purchasing related documents; reviews documents and data for compliance with program requirements; maintains complex files, records, correspondence and other documents; prepares detailed reports regarding budgetary and funding allocations and expenditures; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Purchasing Assistant is an advanced level class in the series. An incumbent in this class performs advanced clerical and technical administrative duties that require substantial interpretation and application of laws, regulations and/or specialized departmental and 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.

- Provides advanced clerical and technical administrative support to the purchasing and contracting process; modifies established templates and formats to prepare a variety of purchasing-related documents and correspondence including requests for bids/proposals, contracts, renewals, requisitions, purchase orders, proposals, agreements, and correspondence; proofreads documents for accuracy, completeness, and compliance with purchasing policies, procedures and requirements; coordinates administrative approval processes.
- Coordinates with departments to obtain scope of work and other required information; creates and maintains potential bidder lists; drafts and publishes IFB/RFP documents and sends to requestors; attends and takes minutes/notes at various bid-related conferences and related meetings; prepares and distributes addenda and project changes as requested.
- Supports the vendor selection and contract preparation process; develops bid-related evaluation packets and forms; verifies the submission of required documents and vendor references/qualifications; coordinates with departmental, legal and other parties to ensure technical contract correctness.
- Drafts and finalizes procurement-related Board agenda items and staff reports using established templates and required formats; schedules agenda items in compliance with administrative procedures and deadlines; may attend Board meetings as a technical process representative.
- Monitors contract renewal dates and initiates the renewal process based on expiration date and procedural requirements; coordinates with departments to confirm renewal terms and funding plans; drafts renewal documents for approval by management; obtains signatures and distributes final documents.
- Performs contract closing processes.



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- Provides input regarding the design, organization, retrieval, and reporting functions for procurement-related information systems; recommends the feasibility of modifying administrative systems and procedures to improve efficiencies using automated records processing.
- Conducts and coordinates technical administrative studies and projects concerning Santa Cruz 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.
- Develops, maintains and updates administrative procedures related to areas of assignment; provides information and explains policies to staff and other agencies.
- Tracks, maintains, collects, assembles, and summarizes operational, financial and budgetary data related to assigned responsibilities and functions; prepares and provides reports and updates to management; collects, compile, and organizes data for required reporting to State and/or Federal agencies.
- Maintains files in accordance with established indexing systems; reviews dated files to purge or combine materials; updates index and cross reference files.
- Receives, reviews, and processes requests and complaints from other departments, other agencies and/or members of the public; researches information to assist management in formulating a response.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

EMPLOYMENT STANDARDS:

Knowledge of:

- Contract principles and administration procedures.
- Technical principles, practices, and procedures common to public administration, including budgeting, records management, purchasing, human resources administration, and the use of technology.
- Basic laws 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 percentages and intermediate statistics.
- Advanced telephone techniques and etiquette.
- The effective use of modern office equipment, personal computers, and standard business software.



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Ability to:

- Draft and revise a variety of contract documents utilizing clear, precise, and detailed language.
- 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.
- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college in public administration, business administration, or a related field.

AND

Three (3) years of responsible clerical or program administration experience, which required the operation of office equipment maintaining/retaining complex records and files.

Experience must have included at least two (2) years administering purchasing related processes.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Technical
*Job Series:	Purchasing Assistant
*Job Series Level:	Advanced
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS119
FLSA Status: Non-exempt*

**Revenue Account Coordinator
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, performs bookkeeping, record keeping and general support duties for Santa Cruz METRO's Revenue Account Coordinator; distributes Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Revenue Account Coordinator is a journey-level clerical and program support class in this series. 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.

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 Santa Cruz METRO's Ticket and Pass Sales Program.
- Delivers Santa Cruz METRO tickets and passes to ticket agents and vendors; reconciles ticket stock, and collects payments for tickets and passes sold. Provides program information and orientation to potential and new ticket agents
- Maintains various records and information in manual and automated files related to ticket and pass sales including sales reports, deposit slips, receipts, invoices, 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 and makes bank deposits.
- Balance Ticket Vending Machine (TVM) sales; retrieve revenue and refill machines with change; counts and deposits TVM revenues; orders change to refill machines; provides revenue information to the Finance department.
- Fulfills ticket and pass requests received via Internet; mail order; and discounted pass requests (bulk purchases.)
- Ensures that cash is handled in dual custody to maintain adequate financial controls and that all fare media is secure and protected at all times
- Communicates with outside contractors during periodic audits.
- Maintains inventories and orders supplies.
- Type memoranda, letters, reports, contracts, purchase orders, statistical data, specifications, and other documents as directed.
- Answers telephones and provides information to employees and the public.



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- Operates standard office equipment; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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, percentages and basic statistics.
- 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 in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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:

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

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

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Financial Administrative Support
*Job Series:	Revenue Account
*Job Series Level:	Journey
*Confidential:	No

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

*Class Code: AS118
FLSA Status: Non-exempt*

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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Revenue Collection Clerk is a journey-level class in the series. 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 Santa Cruz 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; utilizes standard business computer software in performing job tasks; operates specialized revenue and fare counting equipment.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



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EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures and equipment.
- 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 percentages and basic statistics.
- Basic money handling procedures, including counting large sums of money.
- Telephone techniques and etiquette.
- 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 Santa Cruz METRO software if assigned.
- Drive a Santa Cruz METRO vehicle to various work locations as required.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 cash handling and counting large sums of money.



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LICENSES AND CERTIFICATES:

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

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

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Clerical
*Job Series:	Revenue Collection
*Job Series Level:	Journey
*Confidential:	No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: OA206
FLSA Status: Non-exempt*

**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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Revenue Collection Supervisor is the supervisor 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 Santa Cruz 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; utilizes standard business computer software in performing job tasks; operates specialized revenue and fare counting equipment.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



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EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- 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 percentages.
- Telephone techniques and etiquette.
- 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 Santa Cruz METRO software if assigned.
- Drive a Santa Cruz METRO vehicle to perform assignments as required.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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Santa Cruz METRO**

MINIMUM QUALIFICATIONS:

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

Education, Training, and Experience:

Two (2) years course work from an accredited college in business administration, accounting, or a related field.

AND

Two (2) years of clerical and one (1) year supervisory experience requiring revenue collection, cashiering and/or handling and counting large sums of money.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is 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 a requisite background check.
- May occasionally work extended hours or hours outside of the regular schedule.



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*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical
*Job Series: Revenue Collection
*Job Series Level: Supervisory
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
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*Class Code: P0204
FLSA Status: Non-exempt*

**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 Santa Cruz METRO policies and procedures; develops and updates curriculum, lesson plans, and training/reference materials; oversees the Assistant Safety and Training Coordinator; participates in the development and updating of accident investigation procedures and processes as well as departmental safety procedures; and performs related duties as required.

DISTINGUISHING CHARACTERISTICS:

Safety and Training Coordinator is the supervisory level class series. An incumbent in this class performs the full scope of Safety and Training Coordinator level of planning, developing, and coordinating the delivery of required training programs for bus operators and other Santa Cruz METRO 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.

- 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 Santa Cruz METRO policies, procedures and labor agreements.
- Trains and coordinates with Transit Supervisors who assist in training and re training Santa Cruz METRO employees
- Develops and updates curriculum, lesson plans, training and reference materials for Bus Operators, Transit Supervisors and other Santa Cruz METRO employees;
- Develops 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 and Assistant Safety and Training Coordinator that assist with training and retraining of Bus Operators and other Santa Cruz METRO employees.
- Assists the Operations Manager 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 evaluates new Operators during training;



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- Provides recommendations regarding Operator retention based on training information;
- Participates in direct observations of Operator skills as required;
- Conducts corrective action or re-training as appropriate;
- Participates in selection of new Bus Operators
- Participates in the delivery of training instruction as required, including VTT classes;
- Develops and may provide customized or specialized trainings as requested.
- May represent Santa Cruz 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;
- Initiates or may have significant input into disciplinary actions.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drives and Operates Santa Cruz METRO vehicles to perform assignments.
- Performs related work as required
- Responsible for the implementation of ongoing line-instruction program, including selection, training, and evaluation of the line instructor regarding monetary, grading, reporting, and program compliance criteria.
- Conducts verification of transit training (VTT) classes as required; and provides customized trainings as required by Superintendent.
- Participates in the planning, organizing, and support of internal and external training activities.
- Provides training in escalated or emergency situations, as assigned.
- Reviews pull-notices and takes appropriate action when required.
- Upon request, provides technical training assistance, pull- notice review for the paratransit department.
- Enforces Santa Cruz METRO rules, policies, and procedures; applies provisions of Labor Agreements within the scope of duties.
- May represent Santa Cruz METRO at disciplinary hearing, legal proceedings, and other meetings, as required
- Incorporates information into training curriculum on new equipment, and changes in existing equipment.
- May serve as a liaison with local emergency responders, such as police and fire, by providing information and orientation regarding Santa Cruz METRO vehicle fleet, fuels utilized, emergency access, and other public safety related information.
- May participate in committees and projects teams, may make recommendations related to safety, training, licensing requirements, accident investigations, and other position related topics as assigned;
- Serves as hazardous materials trainer for the Operations department.
- Assist with the development of departmental policies, procedures, programs and budget on safety related issues in cooperation with the Safety, Security and Risk Department.
- Assist in conducting surveys of other organizations to compile, and analyze data, prepare report and perform calculations, as needed.
- Selects, supervises, trains, motivates, assigns, evaluates, counsels, and disciplines staff.



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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 percentages, ratios, and basic statistics.
- The effective use of modern office equipment, personal computers, and applicable 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.
- Instruct others in the safe operation of Santa Cruz METRO vehicles and adapt training procedures to the needs of the individual.
- Act as liaison with community groups, transit agencies, 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively in both oral and written form.



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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;

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:

A valid California Class "B" Commercial Driver's License with a "P" passenger endorsement will be required at the time of appointment and throughout employment.

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 and throughout employment.
- May occasionally work 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.



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Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk, climb, bend, kneel, 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 a requisite background check.
- This position is considered a safety sensitive position and requires participation in Santa Cruz METRO’s drug and alcohol testing program.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Administrative Technical
*Job Series:	Safety and Training
*Job Series Level:	Supervisor
*Confidential:	No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: PP109
FLSA Status: Non-exempt*

**Safety and Training Program Specialist I
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Safety and Training 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 Santa Cruz METRO policies and procedures; collects and analyzes data and produces reports; investigates workplace accidents/incidents and claims filed against Santa Cruz METRO; and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Safety Program Specialist I is the entry/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 Santa Cruz METRO policies and procedures.
- Implements the System Safety Program Plan and other Santa Cruz 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 Santa Cruz METRO liability; collects accident/incident information; verifies medical treatment expenses and lost wages; compiles value of property damage.
- Investigates accidents/incidents for both internal Santa Cruz 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.



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- Assists Santa Cruz 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.
- Identifies and processes recovery actions for damages Santa Cruz 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 Santa Cruz 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 and photography equipment; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

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.



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- 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 percentages and intermediate statistics.
- 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 Santa Cruz 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 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.



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LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

AND

Ability to obtain a Cal-OSHA Safety and Health certificate is required at the time of appointment.

Ability to obtain 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.

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.
- May occasionally work extended hours or hours outside of regular schedule.



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*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Professional
*Job Series: Safety and Training Program Specialist
*Job Series Level: Entry/First working
*Confidential: No

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*Class Code: P0214
FLSA Status: Non-exempt*

**Safety and Training 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 Santa Cruz METRO policies and procedures; collects and analyzes data and produces reports; investigates workplace accidents/incidents and claims filed against Santa Cruz METRO; and performs related work as required.

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 Santa Cruz METRO policies and procedures.
- Implements the System Safety Program Plan and other Santa Cruz 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 Santa Cruz METRO liability; collects accident/incident information; verifies medical treatment expenses and lost wages; compiles value of property damage.
- Investigates accidents/incidents for both internal Santa Cruz 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.



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- Assists Santa Cruz 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.
- Identifies and processes recovery actions for damages Santa Cruz 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 Santa Cruz 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 and photography equipment; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

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.



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- Analytical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics, including percentages and intermediate statistics.
- 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 Santa Cruz 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 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.



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LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

AND

Possession of a Cal-OSHA Safety and Health certificate is required at time of appointment.

Ability to obtain a Cal-OSHA Advance Safety and Health certificate is desirable.

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.

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



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Professional
*Job Series: Safety and Training Program Specialist
*Job Series Level: Journey
*Confidential: No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: PP110
FLSA Status: Non-exempt*

**Scheduling Analyst
Bargaining Unit: SEA**

DEFINITION:

Under direction, a Scheduling Analyst performs technical duties to support Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Scheduling Analyst is a journey-level class in the series. 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; utilizes computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 ratios, percentages, and intermediate statistics.
- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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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Santa Cruz METRO**

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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Planning Technical
*Job Series:	Scheduling
*Job Series Level:	Journey
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: PP101
FLSA Status: Non-exempt*

**Senior Accounting Technician
Bargaining Unit: SEA**

DEFINITION:

Under direction, an Senior Accounting Technician 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Senior Accounting Technician is a journey-level class in this 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 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 Specialist because an incumbent in the latter class performs advanced 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.

- 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; utilizes computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages, intermediate statistics, and financial data conventions.
- The effective use of modern office equipment, personal computers, and standard business software.



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Santa Cruz METRO**

Ability to:

- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 certificate of proficiency from an accredited college including 12 units in accounting, business administration, or a comparable field of coursework.

AND

Three (3) years of experience requiring technical bookkeeping, financial recordkeeping, and/or accounts payable and receivable work, preferably in a public agency.

OR

Two (2) years successfully performing an Accounting Technician position.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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Santa Cruz METRO**

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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Financial Technical
*Job Series:	Accounting Technician
*Job Series Level:	Journey
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS110
FLSA Status: Non-exempt*

**Senior Customer Service Representative
Bargaining Unit: SEA**

DEFINITION:

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

DISTINGUISHING CHARACTERISTICS:

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

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

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

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



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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 Santa Cruz METRO customers.
- Specialized scheduling software.
- Local and regional transportation services.
- Principles and methods of currency counting and cash record-keeping.
- Effective customer service techniques.
- Public speaking techniques.
- Basic mathematics including, percentages and basic statistics.
- Telephone techniques and etiquette.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

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



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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:

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

Fluency in English and Spanish is desirable.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

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

Mental Demands

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

Work Environment:

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

OTHER CONDITIONS OF EMPLOYMENT:

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

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

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: P0206
FLSA Status: Exempt*

**Senior Financial Analyst
Bargaining Unit: SEA**

DEFINITION:

Under minimal supervision, the Sr Financial Analyst is responsible for the analysis of highly complex and specialized finance and budget related work, which carry significant consequence of error, responsible for Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

The Sr Financial Analyst is the advanced level professional class in the Financial Analyst series. An incumbent in this series performs highly complex and technical analytical and financial analysis to provide accurate and timely financial reports to management, other governmental agencies, and the public, to support sound decision-making and ensure appropriate public disclosure and accountability. Work requires the exercise of a high degree of independent judgement based a on thorough knowledge of business activities and financial management practices and procedures.

The Sr. Financial Analyst position is distinguished from the Financial Analyst position in that the Sr. Financial Analyst serves as a subject expert, and performs more difficult, complex, and sensitive work of greater system wide impact. Assignment at this level requires the use of considerable knowledge, expertise, discretion, judgement and interpersonal skills. Unlike the Financial Analyst, the Senior Financial Analyst is expected to initiate and recommend studies and projects that would assist Management in decisions that have organizational impact.

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 Santa Cruz 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 Santa Cruz METRO's actual revenues and expenses in relation to the adopted operating and capital budgets.



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- Systems Administrator for Santa Cruz 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 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.
- 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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
- 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 percentages, intermediate statistics, and financial data conventions.
- The effective use of modern office equipment, personal computers, and standard business software, including specialized financial applications.



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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.
- 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 and tact.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

SPECIAL REQUIREMENTS:

- Must maintain strictest confidentiality of information.
- May require occasional travel.



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

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

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Financial Professional
*Job Series:	Financial Analyst
*Job Series Level:	Advanced
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: AS117
FLSA Status: Non-exempt*

**Senior Payroll Specialist
Bargaining Unit: SEA**

DEFINITION:

Under direction, a Senior Payroll Specialist performs advanced accounting work related to timekeeping and payroll matters impacting all Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Senior Payroll Specialist is the advanced-lead 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 Specialist because an incumbent in the latter class performs journey level technical payroll processing and administration for a single Santa Cruz 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 the payroll system.



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- Requests and collects payroll documents, trust warrants, and paychecks from payroll contractor; communicates with the payroll contractor and internal departments.
- Identifies, develops, recommends, and implements payroll system improvements; coordinates with other Santa Cruz 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 accounting activities.
- 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; utilizes standard business computer software in performing job tasks.
- May utilize specialized Santa Cruz METRO software.
- May provide functional direction to other staff performing payroll related duties.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and basic statistics.
- Telephone techniques and etiquette.



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Santa Cruz METRO**

- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- 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.
- Balance multiple assignments simultaneously and effectively.
- Perform mathematical calculations quickly and accurately.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 course work from an accredited college 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.



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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 a requisite background check.
- Must maintain strict confidentiality of work-related information-
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Payroll
*Job Series:	Payroll Specialist
*Job Series Level:	Advanced-Lead
*Confidential:	No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: P0216
FLSA Status: Non-exempt*

**Senior Systems Administrator
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Senior Systems Administrator performs advanced level professional information technology duties related to the design, development, administration, and maintenance of Santa Cruz 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; performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Senior System Administrator is the advanced level class in the series. An incumbent in this class performs the expert range of advanced level professional analytical technology duties. This class is distinguished from the Systems Administrator class because an incumbent in the latter class performs a full range of professional systems administration work while learning to perform the expert range of advanced 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.



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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.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

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.
- Basic mathematics, including percentages and basic statistics.
- The effective use of modern office equipment, personal computers, and standard business software.

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.



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- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 in computer science or a related field **AND** four (4) years of experience.

AND/OR

Eight (8) 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.



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- Must maintain strict confidentiality of work-related information.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Information Technology Professional
*Job Series: Systems Administrator
*Job Series Level: Advanced
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: P0210
FLSA Status: Exempt*

**Senior Transportation Planner
Bargaining Unit: SEA**

DEFINITION:

Under direction, a Senior Transportation Planner performs advanced and specialized professional planning duties to support Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Senior Transportation Planner is the advanced-lead 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.



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- 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 Santa Cruz 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; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

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.



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- 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.
- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Intermediate mathematics, including percentages and intermediate statistics.
- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively in both oral and written form.



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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 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

Certification by the American Institute of Certified Planners (AICP) is desirable.

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.



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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; 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 a requisite background check.
- Must participate in professional development activities.
- May occasionally work extended hours or hours outside of the regular schedule.
- May require occasional travel.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Professional
*Job Series: Transportation Planner
*Job Series Level: Advanced - Lead
*Confidential: No

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HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

Class Code: P0215
FLSA Status: Non-exempt

Systems Administrator Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Systems Administrator performs a full range of professional information technology duties related to the design, development, administration, and maintenance of Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

System Administrator is the journey-level class in the series. An incumbent in this class performs a full range of professional analytical technology duties while learning to perform the expert scope of advanced level work. This class is distinguished from the Senior Systems Administrator class because an incumbent in the latter class performs the expert range of advanced 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.
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

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.
- Basic mathematics including percentages and basic statistics.
- The effective use of modern office equipment, personal computers, and standard business software.

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.



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- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 in computer science or a related field **AND** two years of experience.

AND/OR

Six (6) 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

PHYSICAL AND MENTAL DEMANDS:

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

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear, and use a keyboard. Work often requires 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 a requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally work extended hours or hours outside of the regular schedule.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Information Technology Professional
*Job Series: Systems Administrator
*Job Series Level: Journey
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: OA207
FLSA Status: Non-exempt*

**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 Santa Cruz METRO's bus fleet; schedules and dispatches Bus Operators; ensures that assigned operations comply with applicable laws, regulations, policies, and procedures; and performs other related work as required.

DISTINGUISHING CHARACTERISTICS:

Transit Supervisor is the supervisor level class in the series. In addition to required supervisory duties, an incumbent in this class primarily performs either field/dispatching or scheduling. However, an incumbent will also be cross-trained to ensure adequate coverage across all areas and must 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; testifies in disciplinary hearings as needed.
- Participates in the recruitment, selection, and onboarding 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 on buses, bus stops, and Transit Centers.
- Investigates accidents and incidents; completes required paperwork and reports; identifies causes of accidents and recommends the follow up action, if needed.
- Performs 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.
- Monitors two-way radio system and in-field operations, ensuring compliance with Federal and State regulations and Santa Cruz METRO operating procedures; communicates with maintenance



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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. Assigns work to operators and contacts off duty operators.
- 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 Santa Cruz 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; utilizes standard business computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Attends a variety of meetings as directed
- Performs related work as required
- Participate in bus operator training and leadership programs.
- Coordinates long term detours due to construction and other situations.
- May perform routine timekeeping and administrative detail as directed by management.
- May receive incoming calls and route calls to appropriate personnel.
- May research and prepare a variety of reports and perform special investigations as assigned.
- Schedules individual runs for bus operators and performs other timekeeping duties which utilize personnel effectively in accordance with labor contract provisions.
- Schedules bus operator replacements for the following day
- Prepares various records and reports related to bus operator absenteeism and time off.

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.
- Santa Cruz 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.



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- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics, including percentages and basic statistics.
- Telephone techniques and etiquette.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

High School diploma or equivalent **AND** two (2) years of progressively responsible experience as a Transit Bus Operator with Santa Cruz Metro.

OR

Four (4) years of progressively responsible experience as a public transit bus operator and comparable transit experience.

Previous experience serving as a lead worker is desirable.

Supervisor experience or certification and education in supervision desirable.



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LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

SPECIAL REQUIREMENTS:

- Driving record will be reviewed as part of the application process.
- Conversational knowledge of Spanish 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 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 a requisite background check.
- Required to be able to respond to emergency situations seven (7) days per week, twenty four (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.
- Availability for shift assignment Monday through Sunday
- May occasionally work extended hours or hours outside of the regular schedule.
- This position is considered a safety sensitive position and requires participation in Santa Cruz METRO's drug and alcohol testing program.



**HUMAN RESOURCES DEPARTMENT
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*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Transit Operations
*Job Series: Transit Supervisor
*Job Series Level: Supervisor
*Confidential: No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: P0208
FLSA Status: Non-exempt*

**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 Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Transportation Planner I is the entry/first working 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 Santa Cruz 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.



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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.
- 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 Santa Cruz 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; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

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 percentages and Intermediate statistics.
- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

Certification by the American Institute of Certified Planners (AICP) is desirable.

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 a requisite background check.
- Must participate in professional development activities.
- May occasionally work extended hours or hours outside of the regular schedule.
- May require occasional travel.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Professional
*Job Series: Transportation Planner
*Job Series Level: Entry/First working
*Confidential: No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: P0202
FLSA Status: Non-exempt*

**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 Santa Cruz 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 related work as required.

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 Santa Cruz 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



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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 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 Santa Cruz 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; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required.

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.



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- 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 percentages and intermediate statistics.
- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

Certification by the American Institute of Certified Planners (AICP) is desirable.

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.



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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; 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 a requisite background check.
- Must participate in professional development activities.
- May occasionally work extended hours or hours outside of the regular schedule.
- May require occasional travel.

*Adopted: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Professional
*Job Series: Transportation Planner
*Job Series Level: Journey
*Confidential: No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: OA208
FLSA Status: Exempt*

**Transportation Planning Supervisor
Bargaining Unit: PSA**

DEFINITION:

Under general direction, a Transportation Planning Supervisor performs supervisory and advanced professional planning duties to support Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Senior Transportation Planner is the supervisor 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



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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 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 Santa Cruz 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; utilizes computer software in performing job tasks.
- Drive a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and intermediate statistics.
- 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 Santa Cruz METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively in both oral and written form.



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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 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 two (2) years of recent supervisory 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:

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

Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

Certification by the American Institute of Certified Planners (AICP) is desirable.

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



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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 a requisite background check.
- Must participate in professional development activities.
- May occasionally work extended hours or hours outside of regular the schedule.
- May require occasional travel.

*Adopted:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Planning Professional
*Job Series:	Transportation Planner
*Job Series Level:	Supervisor
*Confidential:	No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SC107
FLSA Status: Non-exempt*

**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 Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Upholsterer I is the journey 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 advanced 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, Santa Cruz 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 Santa Cruz METRO vehicles.
- Repairs and replaces seat springs and cushions.
- Constructs, rebuilds, and/or repairs seat assemblies for Santa Cruz METRO vehicles and equipment.
- Assists in making 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 Santa Cruz 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 a clean area.
- Maintains Santa Cruz METRO property, tools, and equipment provided.
- Performs pickup and delivery functions to satellite facilities.



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- May assist with emergency road service calls and operate buses for maintenance purposes.
- Maintains written records of repairs on work orders.
- Drives a Santa Cruz METRO vehicle to perform Assignments
- Operates a personal computer and standard business software.
- Performs related work as required

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 percentages and basic statistics.
- 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 Santa Cruz 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.



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- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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 upholstery apprenticeship program.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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 80 pounds aided 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.



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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 a background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- This position is considered a safety sensitive position and requires participation in Santa Cruz 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: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance
*Job Series: Upholsterer
*Job Series Level: Journey
*Confidential: No



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*Class Code: SC108
FLSA Status: Non-exempt*

**Upholsterer II
Bargaining Unit: VMU**

DEFINITION:

Under general direction, an Upholsterer II performs skilled work related to upholstery and minor structural repairs for Santa Cruz METRO vehicles; repairs seat cushions, backrests, and flooring; assists with minor vehicle body and framework repairs; replaces and repairs windows and glass, and performs related work as required

DISTINGUISHING CHARACTERISTICS:

Upholsterer II is the advance-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 advanced-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, Santa Cruz 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 Santa Cruz METRO vehicles.
- Repairs and replaces seat springs and cushions.
- Constructs, rebuilds, and/or repairs seat assemblies for Santa Cruz 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 Santa Cruz 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 Santa Cruz 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.



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- Drives a Santa Cruz METRO vehicle to perform Assignments
- Maintains written records of repairs on work orders.
- May provide work coordination and training for Upholsterer I incumbents, as assigned.
- Installs and removes advertising
- Operates standard office equipment; utilizes computer software in performing job tasks.
- Performs related work as required

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 percentages and basic statistics.
- 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 Santa Cruz 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.



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- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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 80 pounds aided 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.



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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 a background check.
- May occasionally work extended hours or hours outside of the regular schedule.
- This position is considered a safety sensitive position and requires participation in Santa Cruz 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: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance
*Job Series: Upholsterer
*Job Series Level: Advanced
*Confidential: No



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*Class Code: SC109
FLSA Status: Non-exempt*

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 Santa Cruz METRO vehicles to Original Equipment Manufacturer (OEM) specifications. Maintains and repairs bus interiors, destination signs, windows, and mirrors and performs related work as required.

DISTINGUISHING CHARACTERISTICS:

Vehicle 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 Santa Cruz METRO 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 Santa Cruz METRO 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, stripping, 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 Santa Cruz METRO 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.



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- Performs emergency repairs on road calls.
- 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; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required

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 percentages and basic statistics.
- 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 Santa Cruz METRO 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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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:

One (1) year of progressively responsible, journey-level experience in vehicle body repair and painting.

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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 aided 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 a 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.
- May occasionally work extended hours or hours outside of the regular schedule
- This position is considered a safety sensitive position and requires participation in Santa Cruz 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: 12-11-18
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance
*Job Series: Vehicle Body Repair Mechanic
*Job Series Level: Journey
*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SM104
FLSA Status: Non-exempt*

**Vehicle Service Detailer
Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Vehicle Service Detailer performs maintenance work related to detailing and servicing Santa Cruz 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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Vehicle Service Detailer is an advance-level class. An incumbent in this class performs tasks that ensure that Santa Cruz 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 Santa Cruz 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 Santa Cruz METRO vehicles.
- Washes Santa Cruz METRO buses and other vehicles with automated bus washing equipment.
- Vacuums or sweeps interiors of Santa Cruz 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 Santa Cruz 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; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Performs related work as required

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 percentages and basic statistics.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Read, interpret, and apply Santa Cruz 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 Santa Cruz METRO buses and equipment.
- Perform minor touch-up painting on Santa Cruz 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 in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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 a background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally work extended hours or hours outside of the regular schedule.
- This position is considered a safety sensitive position and requires participation in Santa Cruz 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:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Maintenance
*Job Series:	Vehicle Service
*Job Series Level:	Advanced
*Confidential:	No



HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SM102
FLSA Status: Non-exempt*

**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 related work as required.

DISTINGUISHING CHARACTERISTICS:

Vehicle Service Worker I is the Entry/First working level class in the series. An incumbent in this class performs the routine vehicle service and shop maintenance tasks to maintain Santa Cruz 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 Santa Cruz METRO vehicles.
- Empties trash receptacles on buses.
- Washes Santa Cruz METRO vehicles.
- Operates automated bus washing equipment.
- Cleans windows in Santa Cruz 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 Santa Cruz METRO buses and vehicles between yards for servicing as directed.
- Performs related work as required

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.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including percentages and basic statistics.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Read, interpret, and apply Santa Cruz 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 Santa Cruz METRO software if assigned.
- Communicate clearly and effectively in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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.



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

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 a requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally work extended hours or hours outside of the regular schedule.
- This position is considered a safety sensitive position and requires participation in Santa Cruz 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:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Maintenance
*Job Series:	Vehicle Service
*Job Series Level:	Entry/First working
*Confidential:	No

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**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SM103
FLSA Status: Non-exempt*

**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 related work as required.

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 Lead 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; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

EMPLOYMENT STANDARDS:

Knowledge of:

- 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 percentages and basic statistics.
- 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 in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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.



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class "B" Driver's License with "P" Passenger endorsement.

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 a requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally work extended hours or hours outside of the regular schedule.
- This position is considered a safety sensitive position and requires participation in Santa Cruz 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:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Maintenance
*Job Series:	Vehicle Service
*Job Series Level:	Journey



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Confidential: No



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Class Code: SM103
FLSA Status: Non-exempt*

**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 related work as required.

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 Lead 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; utilizes computer software in performing job tasks.
- Drives a Santa Cruz METRO vehicle to perform assignments.
- Performs related work as required



HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

EMPLOYMENT STANDARDS:

Knowledge of:

- 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 percentages and basic statistics.
- 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 in both oral and written form.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

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.



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

LICENSES AND CERTIFICATES:

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

Must be able to obtain and maintain a current, valid California Class “B” Driver’s License with “P” Passenger endorsement.

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 a requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally work extended hours or hours outside of the regular schedule.
- This position is considered a safety sensitive position and requires participation in Santa Cruz 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:	12-11-18
*BOD Approved:	00-00-00
*Revised:	00-00-00
*Job Family:	Maintenance
*Job Series:	Vehicle Service
*Job Series Level:	Journey



**HUMAN RESOURCES DEPARTMENT
Santa Cruz METRO**

*Confidential: No



DATE: August 23, 2019

TO: Board of Directors

FROM: Eddie Benson, Maintenance Manager

SUBJECT: CONSIDERATION OF AUTHORIZATION TO USE THE STATE OF CALIFORNIA DEPARTMENT OF GENERAL SERVICES CONTRACT FOR THE PURCHASE OF SIX (6) STERTIL-KONI WIRELESS MOBILE COLUMN LIFTS AND ONE (1) FACILITIES SUPPORT VEHICLE

I. RECOMMENDED ACTION

That the Board of Directors authorize the CEO to use the State of California, Department of General Services Contract for the purchase of six (6) Stertil-KONI Wireless Mobile Column Lifts from Municipal Maintenance Equipment (MME) and one (1) Facilities Support Vehicle from Downtown Ford Sales in an amount not to exceed \$96,147.

II. SUMMARY

- The Santa Cruz Metropolitan Transit District (METRO) has a need to purchase six heavy duty vehicle lifts to facilitate repairs on METRO's articulated buses and one minivan as a custodial support vehicle for the Facilities Maintenance Department.
- Staff requests the use of the State of California, Department of General Services Contract for this procurement as a means of saving money and streamlining the procurement process.
- Staff recommends that the Board of Directors authorize the CEO to use the State of California, Department of General Services Contract for the purchase of six (6) Stertil-KONI Wireless Mobile Column Lifts from MME for an amount not to exceed \$70,538.33 and one (1) Ford Transit Connect minivan from Downtown Ford Sales for an amount not to exceed \$25,607.06.

III. DISCUSSION/BACKGROUND

METRO needs to purchase heavy duty vehicle lifts in order to facilitate repairs of its newly acquired 60' articulated buses, and a small van for custodians to use in the course of their daily work. The State of California, Department of General Services has issued a Multiple Award Schedule that includes the required lifts and minivan. The State of California extends the use of these contracts to local government agencies.

Utilizing statewide cooperative purchasing agreements streamlines the procurement process and allows for better pricing than METRO would normally obtain on its own.

Staff recommends that the Board of Directors authorize the CEO to use the State of California, Department of General Services Contract for the purchase of six (6) Steril-KONI Wireless Mobile Column Lifts from MME for an amount not to exceed \$70,538.33 and one (1) Ford Transit Connect minivan from Downtown Ford Sales for an amount not to exceed \$25,607.06.

IV. FINANCIAL CONSIDERATIONS/IMPACT

Funds to support this procurement are available in the FY20 Capital Budget. The lifts are included in the VTA Bus Transfer line item (lifts) and the minivan is funded by FY18 FTA 5339a grant funds.

V. ALTERNATIVES CONSIDERED

- Do not purchase the lifts. This is not recommended as the articulated buses are already in service and the lifts are essential for facilitating repairs.
- Do not purchase the Facilities Support Vehicle. This is not recommended as this vehicle will replace an older vehicle beyond its useful life.

VI. ATTACHMENTS

Attachment A: Quotes from MME and Downtown Ford Sales

Prepared By: Erron Alvey, Purchasing & Special Projects Director

VII. APPROVALS:

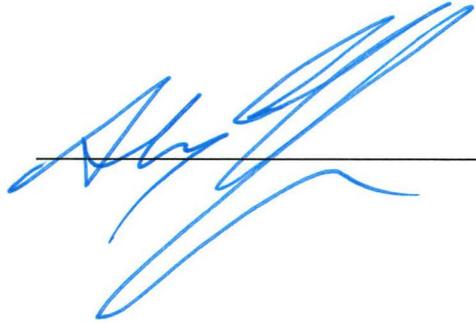
Eddie Benson, Maintenance Manager



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

ok low for AA

Alex Clifford, CEO/General Manager



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Attachment A



Quote

Stertil-Koni
200 Log Canoe Circle
Stevensville, MD 21666
United States

T: 410.643.9001
F: 410.643.8901

Date 08/07/2019
Expires 11/01/2019
Quote # 1359 v2
Contact Ron Reazer

Prepared for Santa Cruz Metropolitan Transit District
Eddie Benson
138 Golf Club Dr.
Santa Cruz, California 95060
United States

T: (831)420-2520
E: ebenson@scmtmd.com

Stertil-Koni Quote

Item	Qty	Price	Total
ST1085 MODEL 6, WIRELESS CONTROLS WITH SYNTHETIC FIXED FRONT WHEELS	1	\$90,938.00	\$90,938.00
Set of 6 Wireless, Battery-Powered Mobile Lifts - 111,000 lbs. capacity, 24 V DC, control box on every column. Adj. Forks			\$64,565.98
29% Item Discount (\$26,372.02)			
Code: ST-1085-3FWA			

Please contact us if you have any questions.

Subtotal	\$90,938.00
Discount	(\$26,372.02)
CA Sales Tax (9.25%)	\$5,972.35
Total Due	\$70,538.33 USD

CMAS contract # 4-07-49-0014A

Local Distributor: MME

Terms and Conditions

1. Price is valid for 90 days from the date of quotation.
2. Product availability and proposed delivery date provided ARO.

Attachment A

DOWNTOWN FORD SALES
 525 NORTH 16TH STREET
 SACRAMENTO CA 95814
 916-442-6931 FAX: 916-491-3138

S080719 326

QUOTE

Customer

Name JASON BURNS / ERRON
 Address SANTA CRUZ METRO
 City _____ State _____ Zip _____
 Phone VIA EMAIL

Date 8/7/2019
 Order No. QUOTATION
 Rep SANDRA SCOTT
 FOB SACRAMENTO

Qty	Description	Unit Price	TOTAL
1	2020 FORD TRANSIT CONNECT VAN PER STATE OF CALIFORNIA CONTRACT 1-18-23-23A CLIN 22	\$22,340.00	\$22,340.00
1	MAINTENANCE AGREEMENT - NON TAXABLE	\$499.00	\$499.00
1	DOC FEE	\$85.00	\$85.00
	sales 9.25%		

Payment Details

- Cash
- Check
- Credit Card

Name _____
 CC # _____
 Expires _____

	SubTotal	\$22,924.00
	Delivery	\$600.00
Taxes	SANTA CRUZ	\$2,074.31
	CA Tire Tax	\$8.75
	TOTAL	\$25,607.06

Office Use Only

\$3000 DISCOUNT WITH PROMPT PAY

SIGNATURE _____ DATE _____



DATE: August 23, 2019
TO: Board of Directors
FROM: Eddie Benson, Maintenance Manager
SUBJECT: CONSIDERATION OF AWARD OF CONTRACT FOR (1) CNG BUS TO GILLIG, LLC IN AN AMOUNT NOT TO EXCEED \$664,797

I. RECOMMENDED ACTION

That the Board of Directors:

- 1) Award a contract to Gillig, LLC for the purchase of one (1) CNG bus in an amount not to exceed \$664,797; and**
- 2) Authorize the CEO/General Manager to execute a cooperative purchasing contract with terms and conditions substantially similar to those of the Washington State Department of Enterprise Services Master Contracts and Consulting Unit's (DES) competitively bid contract and in a form approved by legal counsel.**

II. SUMMARY

- The Santa Cruz Metropolitan Transit District (METRO) has a need to replace buses in its aging fleet and received grant funds for the replacement of one (1) bus.
- Section 3019 of the FAST Act allows grantees to purchase rolling stock and related equipment from a state's cooperative procurement contract or schedule.
- DES competitively bid a contract that allows public transit agencies to utilize the contract for the purchase of transit buses.
- Staff is requesting authorization to proceed with the purchase of one (1) CNG bus from Gillig, LLC using the DES cooperative contract as the most cost effective method to make this purchase.

III. DISCUSSION/BACKGROUND

On December 4, 2015, President Obama signed the Fixing America's Surface Transportation (FAST) Act into law, which provides long-term funding certainty for surface transportation infrastructure planning and investment. Section 3019 of the FAST Act allows grantees to purchase rolling stock and related equipment from a state's cooperative procurement contract or schedule.

On July 24, 2015, DES entered into a contract with Gillig, LLC pursuant to Solicitation 09214, a competitively bid solicitation, for the furnishing of low-floor

40-foot CNG buses. The DES cooperative contract provides public agencies with the ability to purchase transit buses of various configurations from approved vendors that have been selected through a competitive process. DES has granted authorization to METRO to use this contract, thereby enabling the purchase of vehicles that meet proven design and construction standards, which will be configured to METRO's specifications, at highly competitive prices.

METRO received funds from the FTA FY13-17 5339 discretionary grant in the amount of \$456,955. Due to the delay between funding and entering into a purchase contract, additional funds from the Bus Replacement Program in the amount of \$121,293 were approved by the Board on August 24, 2018. After a pre-production meeting with minor changes to add-ons, additional funds in the amount of \$5,910 are required to complete the order, which totals \$664,797.

Staff is recommending that the Board of Directors award a contract to Gillig, LLC for the purchase of one (1) CNG bus in an amount not to exceed \$664,797; and that it authorize the CEO/General Manager to execute a cooperative purchasing contract with terms and conditions substantially similar to those of the DES's competitively bid contract and in a form approved by legal counsel.

IV. FINANCIAL CONSIDERATIONS/IMPACT

Funding in the amount of \$658,887 is available in the FY20 Capital Budget. After the pre-production meeting, Gillig, LLC has quoted the requested CNG bus at \$664,797. Additional funding in the amount of \$5,910 is required to meet the price of the bus after additional add-ons were requested by METRO. There is currently funding available in the capital budget from the Bus Replacement Fund for which this procurement is within the allowable use.

V. ALTERNATIVES CONSIDERED

The Board could direct the Purchasing Director to conduct a standalone procurement for this bus. This is not recommended as it would take approximately six months before a contract would be awarded, it would delay receipt of the bus by the same amount of time, and it would likely result in a higher priced bus due to the small quantity of METRO's order.

VI. ATTACHMENTS

Attachment A: Quote from Gillig, LLC dated August 16, 2019

Attachment B: Contract with Gillig, LLC

Prepared by: Erron Alvey, Purchasing & Special Projects Director

VII. APPROVALS:

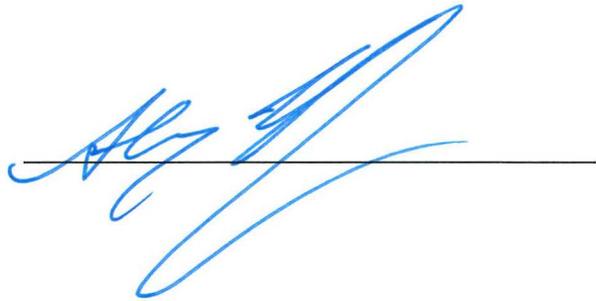
Eddie Benson, Maintenance Manager



Approved as to fiscal impact:
Angela Aitken, Finance Manager



Alex Clifford, CEO/General Manager



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Attachment A

GILLIG

August 16, 2019

Ms. Erron Alvey
Purchasing Manager
Santa Cruz Metropolitan Transit District (METRO)
138 Golf Club Drive
Santa Cruz, CA 95060

RE: REVISED PRICE QUOTE FOR (1) 40' CNG BRT *PLUS* LOW FLOOR BUS

Dear Ms. Alvey,

Thank you for your interest in purchasing one (1) 40' CNG BRT *Plus* Low Floor Bus by using the assigned option from the State of Washington contract. Gillig is pleased to quote the following:

ONE (1) 40' CNG BRT *PLUS* LOW FLOOR BUSES - \$664,797.00 EACH

This price is valid for 30 days. Price excludes license and registration fees, but does include 9.25% California Sales Tax (\$53,629.00) and a 1.00% Spares / Tooling Budget (\$6,051.00).

Delivery will be within 15 months from receipt of purchase order.

We thank you for this opportunity and appreciate your interest in Gillig and our products. We certainly look forward to working with METRO again and in so doing, continuing to build our long-term partnership. Should you have any questions about this quotation, please do not hesitate to contact me at 510-264-5091.

Sincerely,



Norm Reynolds
Regional Sales Manager
Gillig LLC

cc: Ciro Aguirre
Erron Alvey

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Attachment B

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AGREEMENT NO. 19-19 FOR THE PURCHASE AND DELIVERY OF ONE (1) 40' CNG BUS

THIS AGREEMENT is made as of the 23rd day of August 2019, by and between the SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (METRO) and GILLIG LLC (CONTRACTOR).

WHEREAS, METRO desires to procure one (1) 40' CNG BRT PLUS LOW FLOOR transit bus (Bus) to replace vehicles in its existing fleet; and

WHEREAS, under Federal and California law, METRO is permitted to participate in cooperative purchasing contracts, provided such contracts are consistent with METRO's procurement requirements and policies; and

WHEREAS, on November 3, 2014, the Washington Department of Enterprise Services (DES) issued Master Contracts & Consulting, Solicitation 09214, Heavy-duty Public Transit Vehicles (Solicitation 09214) to provide Buses; and

WHEREAS, the Solicitation 09214 is available for use by governmental agencies such as METRO and is consistent with METRO's procurement requirements and policies; and

WHEREAS, on July 24, 2015, DES entered into a contract with CONTRACTOR pursuant to Solicitation 09214 to provide various types of vehicles, including Buses (DES Contract); and

WHEREAS, METRO wishes to utilize DES Contract and CONTRACTOR will provide the Buses to METRO pursuant to the terms of the DES Contract and this Agreement.

NOW, THEREFORE, THE PARTIES AGREE AS FOLLOWS:

1. SCOPE OF SERVICES

This is an Agreement for the purchase of one (1) 40' CNG BRT PLUS LOW FLOOR transit bus, as described more particularly in Exhibit A, Price Sheets. The scope of the CONTRACTOR's services shall consist of the services set forth in Exhibit C, Incorporation of DES Contract, as supplemented by Exhibit A, Price Sheets.

In the performance of its work, and provision of the System, the CONTRACTOR represents that it and any of its subcontractors (1) has and will exercise the degree of professional care, skill, efficiency, and judgment of contractors with special expertise in providing such services; (2) carries all applicable licenses, certificates, and registrations in current and good standing that may be required to perform the work; and (3) will retain all such licenses, certificates, and registrations in active status throughout the duration of this engagement.

2. INCORPORATION OF DES Contract, (Exhibit C)

Except as stated herein, the terms and conditions of the DES Contract, including Solicitation 09214, as amended, including Appendices A-P, bid forms, certifications and assurances, contractor's bid response, and the First, Second, Third, Fourth, and Fifth Amendments to the DES Contract, available online at <https://fortress.wa.gov/es/apps/contractsearch/ContractSummary.aspx?c=09214>, are designated as Exhibit C to this Agreement and are incorporated herein by this reference.

For the purposes of this Agreement, all references in the DES Contract to the Washington State Department of Enterprise Services or DES as purchaser shall mean METRO; all other references to Washington State shall mean the State of California; and the references to the CONTRACTOR shall mean Gillig LLC. All references to the Contract Administrator shall mean the Project Manager, Eddie Benson or designee of METRO.

Attachment B

3. AGREEMENT DOCUMENTS

This Agreement consists of the following documents (Agreement Documents):

- (1) This Agreement.
- (2) Exhibit A, Price Sheets.
- (3) Exhibit B, METRO's Insurance Requirements.
- (4) Exhibit C, Incorporation of DES Contract.
- (5) Exhibit D, METRO's Bond Requirements.

In the event of conflict between or among the terms of the Agreement Documents, the order of precedence shall be the order of documents listed above, with the first-listed document having the highest precedence and the last-listed document having the lowest precedence.

4. TERM OF AGREEMENT

The term of this Agreement shall commence August 23, 2019, the effective date and shall continue until METRO issues its Final Acceptance of the Bus unless the Agreement is terminated sooner in accordance with the terms of the DES Contract.

5. SCHEDULE AND TIME OF COMPLETION

The services of the CONTRACTOR will be based on the scope of Work as outlined in Exhibit C. Upon issuance of a Notice to Proceed, CONTRACTOR shall submit, for METRO review and approval, a detailed project schedule that will describe the detailed schedule for provision of the work.

Exhibit C shall remain in effect throughout this Agreement regardless of any changes or termination of the DES Contract between DES and CONTRACTOR.

6. DELIVERY

The following language is added to DES Contract, Special Terms and Conditions Section 2 "Delivery":

Delivery of Buses shall be determined by signed receipt of METRO's Project Manager: Eddie Benson, at the following point(s) of delivery and may be preceded by a cursory inspection of the bus at METRO's Maintenance Facility located at 138 Golf Club Dr., Santa Cruz, CA 95060.

Hours of delivery shall be 7:00 A.M. to 3:00 P.M. on the following days of the week: Monday through Friday, excluding holidays.

Following delivery of the bus to METRO, METRO shall complete acceptance tests within thirty (30) calendar days. The acceptance tests to be conducted by METRO, and the criteria and standards in respect of such tests, shall be agreed upon by METRO and the CONTRACTOR prior to the CONTRACTOR building the buses. The CONTRACTOR agrees to provide a qualified technician at the location of acceptance to advise METRO on matters relating to the acceptance tests at no cost to METRO during the PDI (Post Delivery Inspection) process.

If a bus passes these tests, METRO will notify the CONTRACTOR in writing of METRO's final acceptance of a bus or buses. Acceptance shall occur earlier if METRO notifies the CONTRACTOR of early acceptance or places the bus into revenue service.

7. CONTRACTOR'S REPRESENTATIVE

It is understood and agreed by the parties that at all times during the term of this Agreement that Clinton Gibson, Senior Project Sales Manager, shall serve as the primary staff person of CONTRACTOR to undertake, render, and oversee all of the services under this Agreement. Upon written notice by the CONTRACTOR and approval by METRO, which will not be unreasonably withheld, the CONTRACTOR

Attachment B

11. RESPONSIBILITY; INDEMNIFICATION

DES Contract, Standard Terms and Conditions Section 3.20(f) "Immunity and Hold Harmless" is deleted in its entirety and restated as follows:

The CONTRACTOR shall indemnify, keep and save harmless METRO and its directors, officers, agents and employees against any and all suits, claims or actions arising out of any of the following:

A. Any injury to persons or property that may occur, or that may be alleged to have occurred, arising from the performance of this Agreement by the CONTRACTOR caused by a negligent act or omission or willful misconduct of the CONTRACTOR or its employees, sub-CONTRACTORS, subconsultants or agents; or

B. Any allegation that materials or services provided by the CONTRACTOR under this Agreement infringe or violate any copyright, trademark, patent, trade secret, or any other intellectual-property or proprietary right of any third party.

The CONTRACTOR further agrees to defend any and all such actions, suits or claims and pay all reasonable charges of attorneys and all other costs and expenses of defenses as they are incurred. If any judgment is rendered against METRO or any of the other individuals enumerated above in any such action, the CONTRACTOR shall, at its expense, satisfy and discharge the same. This indemnification shall survive termination or expiration of the Agreement.

12. INSURANCE

DES Contract, Standard Terms and Conditions Section 3.21 "Insurance" and 3.22 "Industrial Insurance Coverage" are deleted in their entirety and replaced as follows:

CONTRACTOR agrees to maintain insurance coverage as stated in Exhibit B, METRO Insurance Requirements.

13. EQUAL EMPLOYMENT OPPORTUNITY -- NON-DISCRIMINATION ASSURANCE

DES Contract, Standard Terms and Conditions Section 3.22 "Nondiscrimination" is deleted in its entirety and replaced as follows:

A. Equal Employment Opportunity

In connection with the performance of this Agreement, the CONTRACTOR will not discriminate against any employee or applicant for employment because of race, religious creed (including religious dress and grooming practices), color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, sexual orientation, gender (which includes pregnancy, childbirth, breastfeeding, or related medical conditions), gender identity, gender expression, age (if 40 or over), military and veteran status, taking or requesting statutorily protected leave, or any other category protected under federal, state, or local laws,

The CONTRACTOR will take affirmative action to ensure that applicants are employed, and that employees are treated during their employment, without regard to their race, religious creed (including religious dress and grooming practices), color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, sexual orientation, gender (which includes pregnancy, childbirth, breastfeeding, or related medical conditions), gender identity, gender expression, age (if 40 or over), military and veteran status, taking or requesting statutorily protected leave, or any other category protected under federal, state, or local laws. Such actions will include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation; and selection for training, including apprenticeship. The CONTRACTOR agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the consulting officer setting forth the provisions of this nondiscrimination clause.

The CONTRACTOR will, in all solicitations or advertisements for employees placed by or on behalf of the CONTRACTOR, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

Attachment B

The CONTRACTOR will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed or disclosed the compensation of the employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing or action, including an investigation conducted by the employer, or is consistent with the CONTRACTOR's legal duty to furnish information.

The CONTRACTOR will send to each labor union or representative of workers with which it has a collective bargaining agreement or other contract or understanding, a notice to be provided by the agency contracting officer, advising the labor union or workers' representative of the CONTRACTOR's commitments under section 202 of Executive Order 11246 of September 24, 1965, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The CONTRACTOR will comply with all provision of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

The CONTRACTOR will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

In the event of the CONTRACTOR's noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated or suspended in whole or in part and the CONTRACTOR may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

The CONTRACTOR will include the provisions of 41 C.F.R. section 60-1.4 in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The CONTRACTOR will take such action with respect to any subcontract or purchase order as may be directed by the Secretary of Labor as a means of enforcing such provisions including sanctions for noncompliance.

B. NON-DISCRIMINATION ASSURANCE

The CONTRACTOR agrees to carry out applicable requirements of 49 CFR Part 26 in the award and administration of U.S. DOT-assisted contracts. Further, the CONTRACTOR agrees to comply with all provisions prohibiting discrimination on the basis of race, color, or national origin of Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. §§ 2000d et seq., and/or the Fair Employment and Housing Act Government Code section 12940 et seq. and the applicable regulations promulgated thereunder (California Code of Regulations, Title 2, Section 7285 et seq.) and with U.S. DOT regulations, "Nondiscrimination in Federally-Assisted Programs of the Department of Transportation – Effectuation of Title VI of the Civil Rights Act," 49 C.F.R. Part 21.

The applicable regulations of the Fair Employment and Housing Commission implementing Government Code Section 12940 et seq., set forth in Chapter 5 of Division 4 of Title 2 of the California Code of Regulations, are incorporated into this Contract by reference and made a part hereof as if set forth in full.

In the event of the CONTRACTOR's noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated or suspended in whole or in part.

Attachment B

14. CONFIDENTIALITY

A. Disclosure of METRO Records. The following paragraph is inserted at the end of DES Contract, Standard Terms and Conditions Section 3.19(f):

The CONTRACTOR, its employees, subcontractors and agents, shall not release any reports, information, or other materials prepared in connection with this Agreement, whether deemed confidential or not, without the approval of METRO's General Manager/CEO or designee.

B. California Public Records Act. All references in the DES Contract to Chapter 42.56 RCW (Public Disclosure Act) shall mean Cal. Gov. Code §§ 6250 et seq. (California Public Records Act).

C. Confidentiality Agreement. Subject to METRO's obligations under the California Public Records Act, METRO and its representatives and agents agree to enter into a confidentiality agreement with the CONTRACTOR prior to commencing an audit, review or analysis in order to protect and maintain the confidentiality of the CONTRACTOR's information.

15. CONFLICTS OF INTEREST

References in the DES Contract to RCW 42.52 shall mean Cal. Govt. Code Section 1090 et seq. and Cal. Govt. Code Section 87100 et seq.

Additionally, DES Contract, Standard Terms and Conditions Section 3.20(e) "Gifts and Gratuities" is deleted in its entirety and replaced as follows:

A. General

Depending on the nature of the work performed, a CONTRACTOR of METRO may be subject to the same conflict of interest prohibitions established by the Federal Transit Administration (FTA), Federal Highway Administration (FHWA) and (for Federally-funded Agreements) California law that govern METRO's employees and officials (Cal. Govt. Code Section 1090 et seq. and Cal. Govt. Code Section 87100 et seq.). During the proposal process or the term of the Agreement, CONTRACTOR and its employees may be required to disclose financial interests.

The CONTRACTOR warrants and represents that it presently has no interest and agrees that it will not acquire any interest that would present a conflict of interest under California Government Code §1090 et seq. or §87100 et seq. during the performance of services under this Agreement. The CONTRACTOR further covenants that it will not knowingly employ any person having such an interest in the performance of this Agreement. Violation of this provision may result in this Agreement being deemed void and unenforceable.

Depending on the nature of the work performed, CONTRACTOR may be required to publicly disclose financial interests under METRO's Conflict of Interest Code. Upon receipt, the CONTRACTOR agrees to promptly submit a Statement of Economic Interest on the form provided by METRO.

No person previously in the position of Director, Officer, employee or agent of METRO during his or her tenure or for one (1) year after that tenure shall have any interest, direct or indirect, in this Agreement or the proceeds under this Agreement, nor may any such person act as an agent or attorney for, or otherwise represent the CONTRACTOR by making any formal or informal appearance, or any oral or written communication, before METRO, or any Officer or employee of METRO, for a period of one (1) year after leaving office or employment with METRO if the appearance or communication is made for the purpose of influencing any action involving the issuance, amendment, award or revocation of a permit, license, grant, or contract.

B. Organizational Conflicts of Interest

CONTRACTOR shall take all reasonable measures to preclude the existence or development of an organizational conflict of interest in connection with work performed under this Agreement and other solicitations. An organizational conflict of interest occurs when, due to other activities, relationships, or contracts, a firm or person is unable, or potentially unable, to render impartial assistance or advice to METRO; a firm or person's objectivity in performing the contract work is or might be impaired; or a firm or person has an unfair competitive advantage in proposing for award of a contract as a result of information gained in performance of this or some other Agreement.

Attachment B

CONTRACTOR shall not engage the services of any subconsultant or independent consultant on any work related to this Agreement if the subconsultant or independent consultant, or any employee of the subconsultant or independent consultant, has an actual or apparent organizational conflict of interest related to work or services contemplated under this Agreement.

If at any time during the term of this Agreement CONTRACTOR becomes aware of an organizational conflict of interest in connection with the work performed hereunder, CONTRACTOR immediately shall provide METRO with written notice of the facts and circumstances giving rise to this organizational conflict of interest. CONTRACTOR's written notice will also propose alternatives for addressing or eliminating the organizational conflict of interest.

If at any time during the term of this Agreement, METRO becomes aware of an organizational conflict of interest in connection with CONTRACTOR's performance of the work hereunder, METRO shall similarly notify CONTRACTOR.

In the event a conflict is presented, whether disclosed by CONTRACTOR or discovered by METRO, METRO will consider the conflict presented and any alternatives proposed and meet with the CONTRACTOR to determine an appropriate course of action. METRO's determination as to the manner in which to address the conflict shall be final.

During the term of this Agreement, CONTRACTOR must maintain lists of its employees, and the subconsultants and independent consultants used and their employees. CONTRACTOR must provide this information to METRO upon request. However, submittal of such lists does not relieve the CONTRACTOR of its obligation to assure that no organizational conflicts of interest exist. CONTRACTOR shall retain this record for five (5) years after METRO makes final payment under this Agreement. Such lists may be published as part of future METRO solicitations.

CONTRACTOR shall maintain written policies prohibiting organizational conflicts of interest and shall ensure that its employees are fully familiar with these policies. CONTRACTOR shall monitor and enforce these policies and shall require any subconsultants and affiliates to maintain, monitor and enforce policies prohibiting organizational conflicts of interest.

Failure to comply with this section may subject the CONTRACTOR to damages incurred by METRO in addressing organizational conflicts that arise out of work performed by CONTRACTOR, or to termination of this Agreement for breach.

16. APPLICABLE LAW

This Agreement, its interpretation and all work performed under it shall be governed by the laws of the State of California. Venue of any action brought with regard to this Agreement shall be in San Mateo County, California. The CONTRACTOR must comply with all federal, State, and local laws, rules, and regulations applicable to the Agreement and to the work to be done hereunder, including all rules and regulations of METRO.

17. LIQUIDATED DAMAGES

The third paragraph of DES Contract, Standard Terms and Conditions Section 3.28(a) is deleted in its entirety and replaced as follows:

The amount of said damages, being difficult if not impossible of definite ascertainment and proof, it is hereby agreed that the amount of such damages due to METRO shall be fixed at \$200.00 per calendar day per bus not delivered in substantially good condition as inspected by METRO at the time released for shipment.

The CONTRACTOR hereby agrees to pay the aforementioned amounts as fixed, agreed and liquidated damages, and further authorizes METRO to deduct the amount of the damages from money due the CONTRACTOR under the Agreement. If the liquidated damages due METRO exceeds the remaining amount due to the CONTRACTOR under this Agreement, then the CONTRACTOR shall pay METRO the remaining liquidated damages owed within thirty (30) days after receipt of a written demand by the General Manager/CEO.

18. LICENSE TO USE "SUBJECT DATA"

All "subject data", defined as specifications, technical data, records and reports, engineering drawings (including shop drawings and working drawings), manuals and instruction materials and

Attachment B

computer or microprocessor software that is delivered or specified to be delivered under the Agreement, shall remain the property of the CONTRACTOR; provided however, METRO shall have a royalty-free, non-exclusive, non-transferable and irrevocable license to use such subject data only for the purposes of operating and maintaining the buses.

The CONTRACTOR grants METRO a royalty-free, non-exclusive and irrevocable license to reproduce, and to use the subject data solely for maintaining and operating the bus. The CONTRACTOR agrees to include the requirements of this clause, modified as necessary to identify the affected parties, in each subcontract and supply order placed under the Agreement.

The CONTRACTOR further agrees to provide to METRO at no cost updates to all subject data, including, without limitation all software, technical data, specifications, manuals, and engineering drawings, when otherwise available, for each bus furnished under this Agreement for the duration that the bus is in revenue service.

19. RISK OF LOSS

In DES Contract, Standard Terms and Conditions Section 3.13(c) "Shipping and Risk of Loss," references to "Delivery Date or Acceptance, whichever is applicable" mean "Delivery Date", except that any loss caused by METRO's negligence or wrongful conduct shall be borne by METRO.

In DES Contract, Standard Terms and Conditions Section 3.13(c) "Title to Product," references to "Delivery Date or Acceptance, whichever is applicable" mean "Delivery Date."

20. WARRANTY

In addition to the warranties stated in CONTRACTOR's proposal, for each item covered by the warranty detailed in the CONTRACTOR's proposal, the CONTRACTOR warrants that for the stated duration, the item 1) conforms to the technical specifications and all other requirements of the contract; 2) fulfills its design functions and is fit for both its ordinary and intended purposes; 3) is free from all patent and latent defects in design, materials, and workmanship; and 4) performs satisfactorily.

21. ENTIRE AGREEMENT; MODIFICATION

This Agreement for Services, including any attachments, constitutes the complete Agreement between the Parties and supersedes any prior written or oral communications. This Agreement may be modified or amended only by written instrument signed by both the CONTRACTOR and METRO.

[signatures on following page]

Attachment B

IN WITNESS WHEREOF, the parties hereto have executed this Agreement by their duly authorized officers as of the Effective Date.

METRO:

Signature: _____

Print: Alex Clifford

Title: CEO/General Manager

Date: _____

GILLIG LLC:

Signature: _____

Print: Joseph Policarpio

Title: Vice President

Date: _____

APPROVED AS TO FORM:

By: _____
Attorney for METRO

Print: Julie Sherman

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DATE: August 23, 2019
TO: Board of Directors
FROM: Eddie Benson, Maintenance Manager
SUBJECT: CONSIDERATION OF RATIFICATION OF USE OF STATE OF CALIFORNIA DEPARTMENT OF GENERAL SERVICES CONTRACT FOR THE PURCHASE OF ONE (1) LOW ROOF CARGO VAN

I. RECOMMENDED ACTION

That the Board of Directors ratify the use the State of California, Department of General Services Contract for the purchase of one (1) Low Roof Cargo Van from Downtown Ford Sales for \$30,254.84.

II. SUMMARY

- The Santa Cruz Metropolitan Transit District (METRO) had a need for a low roof cargo van as a facilities support vehicle to replace aging vehicles in METRO's non-revenue fleet.
- Funds for this purchase were available via the 5339a FY14 grant, but were required to be expended by June 18, 2019.
- Staff thought it prudent to expend these funds before they expired, and was able to utilize the State of California, Department of General Services Contract for this purchase, which saved money and streamlined the procurement process.
- Staff recommends that the Board of Directors ratify the use of the State of California, Department of General Services Contract for the purchase of one (1) Ford Transit Low Roof Cargo Van from Downtown Ford Sales for an amount not to exceed \$30,254.84.

III. DISCUSSION/BACKGROUND

METRO had a need for a low roof cargo van to replace aging vehicles in its non-revenue fleet. The van is used by facilities workers in the course of their daily work. One of the State of California, Department of General Services Multiple Award Schedules included the required cargo van. The State of California extends the use of these contracts to local government agencies.

Utilizing statewide cooperative purchasing agreements streamlines the procurement process and allows for better pricing than METRO would normally obtain on its own.

Staff recommends that the Board of Directors ratify the use of the State of California, Department of General Services Contract for the purchase of one (1) Ford Transit T150 Low Roof Cargo Van from Downtown Ford Sales for the amount of \$30,254.84. METRO received a \$3,000 discount off of Downtown Ford Sales' quoted price due to prompt payment of the invoice.

IV. FINANCIAL CONSIDERATIONS/IMPACT

To support the purchase of the cargo van, funds in the amount of \$33,254.84 were included in the FY19 Capital Budget and provided by the FTA FY14 5339a formula grant. A \$3,000 discount was offered for early payment, so the final cost was \$30,254.84.

V. ALTERNATIVES CONSIDERED

- None.

VI. ATTACHMENTS

Attachment A: Quote from Downtown Ford Sales

Prepared By: Joan Jeffries, Administrative Specialist

VII. APPROVALS:

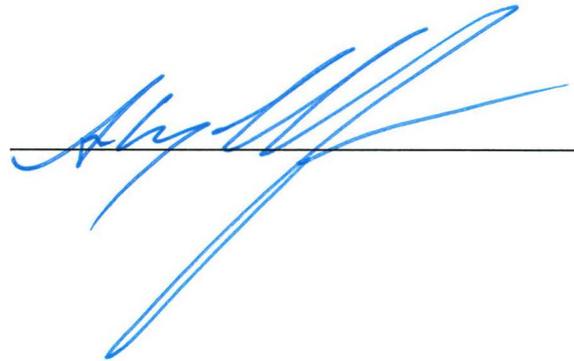
Eddie Benson, Maintenance Manager



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

dlacow for AA

Alex Clifford, CEO/General Manager



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Attachment A

DOWNTOWN FORD SALES
 525 NORTH 16TH STREET
 SACRAMENTO CA 95814
 916-442-6931 FAX: 916-491-3138

S051719 417

QUOTE

Customer

Name JASON BURNS / ERRON
 Address SANTA CRUZ METRO
 City _____ State _____ Zip _____
 Phone VIA EMAIL

Date 5/17/2019
 Order No. QUOTATION
 Rep SANDRA SCOTT
 FOB SACRAMENTO

Qty	Description	Unit Price	TOTAL
1	2018 FORD TRANSIT T150 LOW ROOF CARGO VAN PER STATE OF CALIFORNIA CONTRACT 1-18-23-23A	\$29,882.00	\$29,882.00
1	MAINTENANCE AGREEMENT - NON TAXABLE LIMITED' MAINTENANCE PLAN 60 MONTH / 75,000 MILE / \$0 DEDUCTIBLE 10 VISITS, 7500 MILE INTERVALS	\$864.00	\$864.00
	sales 9.25%		

Payment Details

- Cash
- Check
- Credit Card

Name _____
 CC # _____
 Expires _____

	SubTotal	\$30,746.00
	Delivery	\$600.00
Taxes	SANTA CRUZ	\$2,844.01
	CA Tire Tax	\$8.75
	TOTAL	\$34,198.76

Office Use Only

\$3000 DISCOUNT WITH PROMPT PAY

SIGNATURE _____ DATE _____

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THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

CLARENCE B. ARAGON
BUS OPERATOR

FOR THE COMPLETION OF 10 YEARS OF SERVICE
BETWEEN 2009 AND 2019

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO / GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

SALVADOR CALDERON
BUS OPERATOR

FOR THE COMPLETION OF 20 YEARS OF SERVICE
BETWEEN 1999 AND 2019

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO/GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

TO

A. J. DAUGHERTY
ACCESSIBLE SERVICES COORDINATOR

FOR THE COMPLETION OF 30 YEARS OF SERVICE
BETWEEN 1989 AND 2019

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO / GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

JOSE HERRERA

BUS OPERATOR

FOR THE COMPLETION OF 20 YEARS OF SERVICE
BETWEEN 1999 AND 2019

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO/GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

CHRIS KANE

CUSTODIAL SERVICE WORKER I

**FOR THE COMPLETION OF 20 YEARS OF SERVICE
BETWEEN 1999 AND 2019**

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO/GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

SERGIO LONA-GONZALEZ
BUS OPERATOR

FOR THE COMPLETION OF 30 YEARS OF SERVICE
BETWEEN 1989 AND 2019

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO/GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

LISA M. MITCHELL
BUS OPERATOR

**FOR THE COMPLETION OF 10 YEARS OF SERVICE
BETWEEN 2009 AND 2019**

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO / GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

EDUARDO MONTESINO
BUS OPERATOR

FOR THE COMPLETION OF 20 YEARS OF SERVICE
BETWEEN 1999 AND 2019

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO / GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

RICHARD OROZCO
BUS OPERATOR

FOR THE COMPLETION OF 20 YEARS OF SERVICE
BETWEEN 1999 AND 2019

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO/GENERAL MANAGER



THE BOARD OF DIRECTORS PROUDLY PRESENTS THIS

CERTIFICATE OF APPRECIATION

To

JULIO C. GARCIA VELASCO
BUS OPERATOR

**FOR THE COMPLETION OF 10 YEARS OF SERVICE
BETWEEN 2009 AND 2019**

GIVEN THIS 23RD DAY OF AUGUST 2019

CHAIR, BOARD OF DIRECTORS

CEO/GENERAL MANAGER

VERBAL PRESENTATION ONLY

CEO UPDATE

Alex Clifford

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DATE: August 23, 2019
TO: Board of Directors
FROM: Alex Clifford, CEO/General Manager
SUBJECT: CONSIDERATION OF THE APPOINTMENT OF JAMES VON HENDY TO THE METRO ADVISORY COMMITTEE (MAC) FOR A TERM OF OFFICE ENDING DECEMBER 31, 2021 AND EXTEND THE NOMINATION PERIOD TO SOLICIT AND ACCEPT BOARD NOMINEES AND CITIZEN APPLICATIONS FOR TWO SEATS EXPIRING DECEMBER 31, 2019

I. RECOMMENDED ACTION

The Board of Directors approve the appointment of James Von Hendy to the METRO Advisory Committee (MAC) for a term of office ending December 31, 2021, and extend the nomination period to solicit and accept Board nominees and citizen applications for two seats expiring December 31, 2019.

II. SUMMARY

- There are currently two vacant seats on the METRO Advisory Committee (MAC)—one expiring on December 31, 2019 and the other expiring on December 31, 2021.
- The MAC Ad Hoc Committee would like to fill one of these vacant seats now by nominating James Von Hendy for appointment to MAC with a term of office ending December 31, 2021, and extend the current nomination period on the other vacant seat to find a Cabrillo College representative as defined in the bylaws.
- MAC has an additional seat expiring on December 31, 2019 and staff requests the Board of Directors to include in the above extension another 30-day nomination period to solicit and accept Board nominees and citizen applications to fill this seat.

III. DISCUSSION/BACKGROUND

The METRO Advisory Committee (MAC) is to be comprised of seven members. To the extent it is practical, representation on MAC shall be residents of the County of Santa Cruz, regular riders of the system and will include representatives of the following consumer groups:

- At least one member from the Disability community.
- At least one member from the University of California, Santa Cruz, who is either a student or employee of the same.
- At least one member who is a commuter using the Highway 17 service.
- At least one member of the Disadvantaged Business Community.

- At least one member from Cabrillo College, who is either a student or an employee of the same.
- At least one member who is a rider of Paratransit.

Due to relocations, MAC received two resignations, one on April 29, 2019 and another on May 14, 2019. On May 17, 2019, the Board of Directors approved opening a 30-day nomination period to solicit and accept Board nominees and citizen applications for these two seats.

The MAC Ad Hoc Committee met on August 9, 2019 to review the applications. After considerable review of the candidates, the MAC Ad Hoc Committee would like the METRO Board of Directors to consider the nomination of James Von Hendy (application attached) to serve as a committee member on MAC. If approved by the Board of Directors, the term for James Von Hendy would commence immediately and conclude on December 31, 2021.

The other vacant seat's term expires on December 31, 2019 and the MAC Ad Hoc Committee would like to extend the nomination period and expand the search to find a suitable match from Cabrillo College.

MAC has an additional seat expiring on December 31, 2019 and staff requests the Board of Directors to include in the above extension another 30-day nomination period to solicit and accept Board nominees and citizen applications to fill this seat.

IV. FINANCIAL CONSIDERATIONS/IMPACT

None.

V. ALTERNATIVES CONSIDERED

None.

VI. ATTACHMENTS

Attachment A: MAC Application of James Von Hendy

Attachment B: MAC Bylaws – Adopted January 26, 2018

Prepared by: Donna Bauer, Administrative Assistant

VII. APPROVALS:

Alex Clifford, CEO/General Manager

A handwritten signature in blue ink is written over a solid black horizontal line. The signature is stylized and appears to read 'Alex Clifford'.

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Attachment A

James Von Hendy: [REDACTED]

[REDACTED]
Ben Lomond, CA 95005

Day Phone: [REDACTED]

What interests and experience do you have that would make you an effective MAC member?: As a user of public transportation (SC Metro, VTA light rail, Caltrain, and as an environmentalist and advocate for public transit I believe I bring a commitment to the success of public transit as a viable option for SC county-wide.

Please outline your availability in terms of meeting times/dates and total time per month you can devote to MAC activities: I read the bylaws and see no problem attending meetings as scheduled. Without more knowledge of non-chair requirements I would expect to spend 4-8 hrs/mo.

Are you aware of any conflicts of interest that would prevent you from serving on MAC if appointed?: None

Do you ride Santa Cruz METRO fixed route or Paracruz Service: Santa Cruz METRO fixed route

How often do you use Santa Cruz METRO Fixed Route or METRO ParaCruz Service?:
Daily

What are your particular transit interests?: Environmental Building ridership Coordinating with other transit agencies (VTA, CalTrain, Amtrak) to ensure syncing up of schedules to encourage greater user participation on the highway 17 commuter buses.

What do you think are the biggest challenges for Santa Cruz METRO?: Maximizing service and availability while balancing operating costs.

What do you believe that you can contribute to Santa Cruz METRO & MAC if appointed?: Open-mindedness, fairness, problem resolution, advocacy for the services SC Metro provides.

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BYLAWS

Metro Advisory Committee

ADOPTED JANUARY 26, 2018

Attachment B

BYLAWS FOR THE SANTA CRUZ METRO ADVISORY COMMITTEE

Article I GENERAL PROVISIONS

§1.1 Purpose - Bylaws

These Bylaws shall govern the proceedings of the METRO Advisory Committee (MAC), an advisory committee established by the Board of Directors of the Santa Cruz Metropolitan Transit District (METRO).

§1.1.1 Purpose – METRO Advisory Committee (MAC)

The MAC members serve at the pleasure of the Santa Cruz Metropolitan Transit District Board of Directors. The purpose of the MAC is to provide a citizen forum (advisory committee) in which the METRO Board and CEO/General Manager can delegate topics for discussion and in which recommendations can be formulated and communicated to the METRO Board of Directors. MAC members should be current frequent riders of the fixed-route, paratransit or commuter services provided by Santa Cruz METRO and should approach their review of topics from a regional thinker perspective in their review of matters referred by the METRO Board of Directors or the CEO/General Manager.

§1.2 Construction of Bylaws

As used in these Bylaws, “MAC” means the METRO Advisory Committee. These Bylaws shall govern the MAC’s proceedings to the extent they are not inconsistent with METRO Administrative Code or Regulations or California or Federal law. These Bylaws or amendments become effective upon approval by the METRO Board of Directors.

§1.2.1 Orderly Administration of MAC Meetings

The MAC shall follow Robert’s Rules of Order or Sturgis, the Standard Code of Parliamentary Procedure, as may be adopted by the current Chair of MAC.

§1.3 Definitions: As used in these Bylaws:

- a. “Chair” means the Chair of the MAC Committee.
- b. “Vice chair” means the Vice Chair of the MAC Committee.

Attachment B

- c. "Staff" means staff members that are assigned to support the MAC Committee by the METRO CEO/General Manager.

Article II DUTIES AND AUTHORITY

§2.1 Duties

It shall be the duty of the MAC to provide recommendations to the Board of Directors on matters referred to the MAC by the Board or CEO/General Manager, and to perform such additional duties as assigned by the Board. The MAC may also address issues which members or the public raise with respect to the quantity and quality of services provided by METRO.

§2.2 Limitations on Authority

The sole jurisdiction and authority of the MAC is to serve in an advisory capacity to the Board of Directors. MAC shall not have any authority to take actions that bind METRO or the Board of Directors. With the approval of the CEO/General Manager, and subject to budget considerations, the MAC may design informational signs to be placed on the inside of buses and it may design and distribute an informational brochure to increase the public's knowledge of the operation and existence of the MAC. MAC members are not allowed to give direction to the administrative support personnel or any other METRO employee.

- a. Reports to the Santa Cruz METRO Board of Directors.

Communications by the MAC to the Board of Directors shall be through the CEO/General Manager. All such communications shall be provided to the Board of Directors and placed on the next available Board agenda as a consent item under the heading of "communications to the Board from the MAC."

At the request of the MAC Chair or Vice Chair, and upon concurrence of a majority of the MAC members, matters which the MAC intends to discuss with the Board of Directors may be placed on the Board of Director's agenda by the CEO/General Manager. MAC shall comply with all requirements for the inclusion of such items on the Board's agenda as are deemed appropriate by the CEO/General Manager.

The MAC Chair or Vice Chair shall provide the Board of Directors an oral report on MAC activities twice a year, once in June and once in December.

Attachment B

Article III MEMBERSHIP

§3.1 Membership

a. Appointment to the MAC.

The MAC shall be composed of no greater than 7 members appointed by the Board of Directors. All MAC members shall serve for a term of 4 years and will serve at the pleasure of the Board of Directors. Members wishing to resign from an appointment may submit such resignation to the CEO/General Manager.

The METRO Board of Directors shall nominate individuals to be considered for appointment as members of the MAC. Additionally, Santa Cruz County residents who have submitted an application directly to METRO shall be considered. Annually, the METRO Board Chair shall appoint an Ad Hoc Committee composed of four members of the Board and who shall meet as needed to review the list of Board nominees and other citizen applications and make appointment recommendations to the full Board. Appointments to the METRO Advisory Committee shall be made by the METRO Board of Directors.

b. Composition of Membership on MAC.

All members shall be residents of the County of Santa Cruz. When making its appointments, the Board shall strive to balance the membership to reflect the ethnic, gender, and geographic diversity of the County.

To the extent it is practical, representation on MAC will be regular riders of the system and will include representatives of the following consumer groups:

- i. At least one member from the Disability community.
- ii. At least one member from University of California, Santa Cruz, who is either a student or employee of the same.
- iii. At least one member who is a commuter using the Highway 17 service.
- iv. At least one member of the Disadvantaged Business Community.
- v. At least one member from Cabrillo College, who is either a student or an employee of the same.
- vi. At least one member who is a rider of Paratransit.

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No member of the Board of Directors or elected public official shall be appointed to the Committee.

No employee of METRO or any agency that provides funding to, or contracts with, METRO shall be appointed to the Committee. However, individuals who are employed by the University of California, Santa Cruz in departments other than the Transportation and Parking Services (TAPS), or in the offices that directly supervise TAPS, shall be exempt from the financial/contracting prohibition for MAC members outlined in this section.

§3.2 Members' Terms

- a. The term of membership of each MAC member shall be four years, commencing with the date of appointment by the METRO Board of Directors and terminating on December 31st of the year in which the seat expires. Members may be considered by the Board Ad Hoc Committee for reappointment for additional terms, as approved by the METRO Board of Directors.
- b. Effective January 2018, seat term limits shall follow the following term schedule in order to ensure quorum in future election years as follows:

Seat 1: December 31, 2021
Seat 2: December 31, 2021
Seat 3: December 31, 2021
Seat 4: December 31, 2019
Seat 5: December 31, 2020
Seat 6: December 31, 2020
Seat 7: December 31, 2019

Thereafter, each seat's term will be four years from appointment or re-appointment.

- c. If a seat is vacated prior to the end of its designated term, the newly appointed MAC member shall fill the seat vacated through its designated termination date.

§3.3 Attendance at MAC meetings.

If a member accumulates no less than two consecutive absences from MAC Meetings, without a reasonable excuse, in any rolling twelve-month period, the position shall automatically be declared vacant. In the event of a known absence to an upcoming MAC Meeting, it is expected of the MAC Member(s) that they will contact the Santa Cruz Metropolitan Transit

Attachment B

District Front Office Administration Staff by telephone as soon as the absence is known, but no later than 12:00PM (noon) on the day of the meeting, and that failure to make said contact will constitute an unexcused absence unless circumstances restrict such contact. The Board of Directors shall then be notified of the vacancy so the Ad Hoc Committee can then meet and recommend to the METRO Board a successor to be appointed to fill the remainder of the vacated MAC member's term.

§3.4 Compensation of MAC members

No individual member of the MAC shall be entitled to compensation from METRO, with the exception that Members of the Committee shall receive one (1) system-wide day passes for each meeting that they attend. Any request for reimbursement for travel or other expenses shall not be considered unless approved in advance by the CEO/General Manager.

§3.5 Vacancies

When a vacancy is created or a MAC member's term expires, the METRO Board shall be solicited for nominations. The METRO Board nomination period shall be open for thirty (30) days following the notification to METRO Board Members of the vacancy(s). The METRO Board shall be notified of the open nomination period via email correspondence. Following the conclusion of the thirty-day nomination period, the Ad Hoc Committee shall convene and review current MAC applications on file and current Board Member nominations. The Ad Hoc Committee shall then make new appointee recommendation(s) to the full METRO Board for consideration and approval to fill the expired seat, or the remainder of the vacated MAC member's term.

Article IV OFFICERS

§4.1 Chair and Vice Chair

The MAC shall elect from its membership a Chair and a Vice Chair at the end of the agenda for the last meeting of the calendar year, to serve for a one-year term. In election years when MAC members' terms expire, the Chair and Vice Chair shall be elected at the first meeting after METRO Board appointments and/or reappointments of MAC members have been made, establishing a quorum.

The Chair shall preside at all meetings of the MAC and represent the MAC before the METRO Board of Directors. The Vice Chair shall perform the

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duties of the Chair when the Chair is absent. In the event of a vacancy in the Chair's position, the Vice Chair shall succeed as Chair for the balance of the Chair's term and the MAC shall elect a successor to fill the vacancy in the Vice Chair's position. In the event of a vacancy in the Vice Chair's position, the MAC shall elect a successor from its membership to fill the Vice Chair's position for the remainder of the Vice Chair's term. If the Chair vacates the position prior to the end of his/her one-year appointment, the Vice Chair will be allowed to complete the vacated Chair's term and one full year following the end of the vacated Chair's term.

The Chair may be elected for up to two consecutive terms, and again multiple times during their appointment term(s) provided there is a minimum of a one-year break after having served two consecutive terms.

§4.2 Staff Support

The CEO/General Manager of METRO shall determine the proper staff support for MAC meetings, if any, and furnish administrative personnel to prepare and distribute the MAC's agendas, notices, minutes, correspondence and other materials. The METRO administrative personnel assigned to support the MAC shall maintain a record of all proceedings of the MAC as required by law and shall perform other support duties to the committee as assigned by the CEO/General Manager. The minutes of each meeting, when approved by the MAC shall be made available on the Santa Cruz METRO website on the MAC page. The METRO Board of Directors are encouraged to review these minutes after each MAC meeting.

Article V MEETINGS

§5.1 Regular Meetings

Regular meetings of the MAC shall be held not more than once each calendar quarter (e.g.: March, June, September & December), on the third Wednesday of the month that is selected for the meeting. Whenever a regular meeting falls on a holiday observed by METRO, the meeting shall be held on another day or canceled at the direction of the MAC. A rescheduled regular meeting shall be designated a regular meeting. With the approval of the CEO/General Manager, or at the direction of the METRO Board, the MAC may convene additional "Special" meetings during the calendar year to address time sensitive issues. e.g.: service changes, fare increases, Fiscal Year Budget review. All such "Special"

Attachment B

meetings shall be posted in compliance with Article V, Section 5.3 and Article 6, Section 6.4 below.

At the MAC's last meeting of the calendar year it shall establish a calendar of its regular meetings for the following year. In election years when MAC members' terms expire, it shall establish at the MAC's last meeting of the calendar year the first meeting of the following year. The remaining meetings for that calendar year shall be established once METRO Board appointments and/or reappointments have been made, establishing a quorum. MAC's regular meeting schedule shall be posted on the METRO website once adopted by the MAC.

§5.2 Calling and Noticing of Meetings

All meetings shall be called, noticed and conducted in accordance with the applicable provisions of the Ralph M. Brown Act (commencing with Section 54950 of the Government Code). The CEO/General Manager and METRO Counsel shall be given notice of all meetings.

§5.3 Quorum; Vote

The presence of a majority of the appointed (4) members shall constitute a quorum for the transaction of business. However, when there are vacancies on the MAC the quorum shall be reduced to a majority of the number of Members appointed to the MAC with the provision that a quorum shall never be less than three (3) Members. All official acts of the MAC shall require the affirmative vote of the majority of members present, providing that a quorum is maintained at all times.

§5.4 Thirty Minute Rule

If a quorum has not been established within thirty minutes of the noticed starting time for the meeting, the Chair, or Vice Chair, shall declare the meeting cancelled.

§5.5 Matters Not Listed On the Agenda Requiring Committee Action

All items requiring MAC discussion and/or action are required to be posted on the Agenda and in compliance with Article V, Section 5.3 and Article 6, Section 6.4.

§5.6 Time Limits for Speakers

Each member of the public appearing at a MAC meeting shall be limited to three minutes in his or her presentation, unless the Chair, at his or her

Attachment B

discretion, permits further remarks to be made. Any person addressing the MAC may submit written statements, petitions or other documents to complement his or her presentation. Public presentations that have been scheduled prior to the meeting with the MAC Chair shall not be subject to the time limits contained in this section.

§5.7 Impertinence; Disturbance of Meeting

Any person making personal, impertinent or indecorous remarks while addressing the MAC may, at the Chair's discretion, have their testimony immediately terminated and may, at the Chair's discretion, be barred from further appearance before the MAC at that meeting, unless permission to continue is granted by an affirmative majority vote of the MAC. The Chair may order any person removed from the MAC meeting who causes a disturbance or interferes with the conduct of the meeting, and the Chair may direct the meeting room cleared when deemed necessary to maintain order.

§5.8 Access to Public Records Distributed at Meetings

Writings which are public records and which are distributed during a MAC meeting shall be made available for public inspection at the meeting if prepared by the METRO staff or a member of the MAC, or after the meeting if prepared by some other person. In all instances, every effort shall be made to provide all writings in an accessible format. Anyone having difficulties accessing specific documents should contact the METRO Administrative Office for assistance.

Except as provided above, all public records requests for MAC records shall be made to Santa Cruz METRO pursuant to Santa Cruz METRO's policies and procedures for the same.

Article VI AGENDAS AND MEETING NOTICES

§6.1 Agenda Format

The agenda shall specify the location, starting time and anticipated ending time of each meeting. Each matter to be considered by MAC shall contain a brief general description of each item of business to be transacted or discussed at the meeting. The description shall be reasonably calculated to adequately inform the public of the subject matter of each agenda item. The agenda may include recommendations for MAC action as appropriate.

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§6.2 Public Communications

Each agenda for a regular meeting shall provide an opportunity for members of the public to address the MAC on matters of interest to the public either before or during the MAC's consideration of the item, if it is listed on the agenda, or, if it is not listed on the agenda but is within the jurisdiction of the MAC, under the agenda item heading "Oral/Written Communications". The MAC shall not act upon an item that is not listed on the agenda. Each notice for a special meeting shall provide an opportunity for members of the public to directly address the MAC concerning any item that has been described in the notice for the meeting before or during consideration of that item.

§6.3 Agenda Preparation

The METRO administrative personnel assigned to the MAC shall prepare the agenda for each meeting. One week prior to the posting date of the MAC Agenda, the MAC Chair will work with the assigned METRO administrative personnel to create a draft MAC Agenda. Prior to finalizing the MAC Agenda, the MAC Chair, or Vice Chair, shall meet with the CEO/General Manager, either in person or by phone, to discuss the draft Agenda and to determine whether or not certain items should be included in the MAC Agenda. Since the CEO/General Manager is responsible for oversight of METRO personnel and budget, the CEO/General Manager will have the final approval on the contents of the MAC Agenda, as it relates to all items requiring METRO staff support and compliance with the MAC Bylaws.

§6.4 Agenda Posting and Delivery

The written agenda for each regular meeting and each meeting continued for more than five calendar days shall be posted by the METRO Staff at least 72 hours before the meeting is scheduled to begin. The written agenda for every special meeting shall be posted by the METRO Staff at least 24 hours before the special meeting is scheduled to begin. The agenda shall be posted in a location that is freely accessible to members of the public. The MAC agenda will also be posted to the METRO website (www.scmttd.com) under the Agency Information tab.

The agenda together with supporting documents shall be transmitted to each MAC member, the CEO/General Manager and the METRO Counsel at least three days before each regular meeting and at least 24 hours before each special meeting.

Attachment B

Article VII MISCELLANEOUS

§7.1 Adoption and Amendment of Bylaws

These Bylaws shall be effective upon approval by the METRO Board of Directors and may be revised and amended only by the METRO Board of Directors. The MAC shall have no authority to amend these Bylaws without approval by the Board of Directors

§7.2 MAC Process

The intent of the MAC is to provide consensus based advice and recommendations regarding all matters that have been referred to it by the METRO Board of Directors. However, when such consensus cannot be reached, the Chair of MAC shall present a report that includes the majority consequences and provides a summary of the comments made by those who have not voted with the majority. If no majority consensus is reached, then the report shall so state the same.

Approved by Board of Directors:

September 26, 2003
Revised for 10/24/03
Revised for 12/19/03
Amended/Adopted 12/19/03
Amended/ Adopted 7/23/04
Amended/Adopted 6/23/06
Amended/Adopted 4/27/07
Amended/Adopted 5/25/07
Amended/Adopted 12/16/11
Revised 01/22/16 – Effective 01/01/16
Amended/Adopted 1/26/18

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DATE: August 23, 2019
TO: Board of Directors
FROM: Erron Alvey, Purchasing & Special Projects Director
SUBJECT: CONSIDERATION OF RATIFICATION OF CONTRACT WITH CENTRAL ELECTRIC COMPANY FOR CONSTRUCTION TO INSTALL ELECTRIC VEHICLE CHARGING INFRASTRUCTURE NOT TO EXCEED \$646,496

I. RECOMMENDED ACTION

That the Board of Directors ratify the execution of a contract with Central Electric Company for Construction to Install Electric Vehicle Charging Infrastructure in an amount not to exceed \$553,349, and approve a contingency in the amount of \$93,147

II. SUMMARY

- The Santa Cruz Metropolitan Transit District (METRO) is moving in the direction of an all-electric fleet by the year 2040.
- METRO's goal is in line with the requirements of the California Air Resources Board (CARB) Innovative Clean Transit (ICT) Regulation adopted in December 2018.
- METRO's first four Proterra Zero Emission Buses (ZEBs) are scheduled to arrive on site in February 2020.
- The adoption of the new CARB Regulation and the imminent arrival of the four ZEBs means that METRO is in need of ZEB charging infrastructure to support the operation of the new buses in 2020.
- A competitive procurement for Construction to Install Electric Vehicle Charging Infrastructure was conducted to solicit bids from qualified firms. One firm submitted a bid for METRO's review.
- Staff reviewed the submitted bid and recommended a contract award to Central Electric Company.
- Due to long manufacturing lead times required for the main switchboard and the METRO Board not holding meetings in July, the CEO determined it was in METRO's best interest to execute the contract as soon as possible in order to meet the project deadline.
- Staff is recommending that the Board now ratify the execution of the contract with Central Electric Company.

III. DISCUSSION/BACKGROUND

The METRO Board adopted a resolution in 2017 to set a goal for achieving a fully zero-emission fleet by 2040. CARB's ICT Regulation, adopted in 2018, also requires a full transition to zero-emission technologies by 2040. Through state-awarded funding, METRO procured its first four ZEBs from Proterra, and they are scheduled to arrive on site in February 2020. METRO needs charging infrastructure in place in the bus yard of the Judy K. Souza Operations Facility by the end of the year in order to operate these four buses.

On June 5, 2019, METRO legally advertised and distributed Invitation for Bids (IFB) No. 19-21 for Construction to Install Electric Vehicle Charging Infrastructure to 10 firms and builders' exchanges, posted notice on its website, and sent email notices to all GovDelivery subscribers. On July 9, 2019, a single bid was received and opened from Central Electric Company. Staff and METRO's electrical engineer consultant reviewed the bid submitted, and determined that Central Electric Company was a responsible bidder whose bid was responsive to all the requirements of the IFB. Established in 1912 in Watsonville, Central Electric Company is a local, family run business owned and operated by the 4th generation of its founders.

Staff recommended a contract award to Central Electric Company in an amount not to exceed \$553,349. Due to the long manufacturing lead times required when ordering the main switchboard, the METRO Board not holding meetings in July, and a required project completion date of December 20, 2019, METRO's CEO determined it was in METRO's best interest to execute the contract as soon as possible. Staff is recommending that the Board of Directors now ratify the execution of this contract.

Staff is also requesting approval for a contingency in the amount of \$93,147, and approval authority for the CEO to execute any necessary change orders up to this contingency amount. Contractor will provide all equipment and materials meeting all METRO's specifications and requirements of the contract. Erron Alvey, Purchasing & Special Projects Director, will serve as the Contract Administrator and will ensure contract compliance.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The value of the contract is \$553,349. The addition of a \$93,147 contingency for any necessary change orders brings the total to \$646,496. Funds to support this contract, including the contingency amount, are included in the FY20 Capital Budget through the FY19 Low Carbon Transit Operator Program (LCTOP).

V. ALTERNATIVES CONSIDERED

- None.

VI. ATTACHMENTS

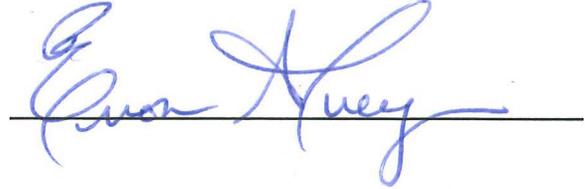
Attachment A: Contract with Central Electric Company

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

Prepared by: Joan Jeffries, Administrative Specialist

VII. APPROVALS:

Erron Alvey, Purchasing & Special
Projects Director



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



Alex Clifford, CEO/General Manager



Attachment A

CONTRACT FOR CONSTRUCTION TO INSTALL ELECTRIC VEHICLE CHARGING INFRASTRUCTURE No. 19-21

THIS CONTRACT is made effective on July 19, 2019 between the SANTA CRUZ METROPOLITAN TRANSIT DISTRICT ("Santa Cruz METRO"), a political subdivision of the State of California, and DUFOUR INCORPORATED d/b/a CENTRAL ELECTRIC COMPANY ("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 Construction to Install Electric Vehicle Charging Infrastructure

Santa Cruz METRO requires Construction to Install Electric Vehicle Charging Infrastructure. In order to obtain said Construction to Install Electric Vehicle Charging Infrastructure, Santa Cruz METRO issued an Invitation for Bids, dated June 5, 2019, setting forth specifications for Construction to Install Electric Vehicle Charging Infrastructure. The Invitation for Bids is attached hereto and incorporated herein by reference as Exhibit A.

1.3 Contractor's Bid Form

Contractor is a licensed general contractor desired by Santa Cruz METRO and whose principal place of business is 430 Walker Street, Watsonville, CA 95076. Pursuant to the Invitation for Bids issued by Santa Cruz METRO, Contractor submitted a bid for Provision of said Construction to Install Electric Vehicle Charging Infrastructure, which is attached hereto and incorporated herein by reference as Exhibit B.

1.4 Selection of Contractor and Intent of Contract

On July 16, 2019, Santa Cruz METRO selected Contractor as the lowest responsive, responsible bidder to provide said Construction to Install Electric Vehicle Charging Infrastructure, located at 110 Vernon Street, Santa Cruz. The purpose of this Contract is to set forth the provisions of this procurement.

1.5 Contractor and Supplier Synonymous

For the purposes of this Contract, the terms "Contractor" and "supplier" are synonymous.

Santa Cruz METRO and Contractor agree as follows:

2. INCORPORATED DOCUMENTS AND APPLICABLE LAW

Attachment A

2.1 Documents Incorporated in This Contract

The documents 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 Contract, except for written amendments, if any, made after the date of this Contract.

a) Exhibit A

Santa Cruz Metropolitan Transit District's "Invitation for Bids No. 19-21" dated June 5, 2019, including Addendum number 1.

b) Exhibit B (Bid Form)

Contractor's submitted bid to Santa Cruz METRO for Construction to Install Electric Vehicle Charging Infrastructure as signed by Contractor.

2.2 Conflicts

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

2.3 Recitals

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

3. TIME OF PERFORMANCE

3.1 General

The work under this Contract shall be completed no later than December 20, 2019.

3.2 Term

The term of this Contract shall commence upon the execution of the Contract by Santa Cruz METRO. Issuance of a Notice to Proceed shall remain in force until Final Acceptance as provided.

3.3 Acceptance of Terms

Execution of this document shall be deemed as acceptance of all of the terms and conditions as set forth herein and those contained in the Instructions to Bidders, the General Conditions, the Special Conditions, the Specifications for Work and all attachments and addenda, which are incorporated herein by reference as integral parts of this Contract.

4. SCOPE OF WORK

4.1 Contractor shall furnish Santa Cruz METRO all supervision, labor, equipment, supplies, material, freight, transportation, tools and other work and services as specified in and in full

Attachment A

accordance with the Invitation for Bids (IFB) No. 19-21 dated June 5, 2019 for Construction to Install Electric Vehicle Charging Infrastructure. The Contractor shall provide a complete project in conformance with the intent shown on the drawings and specified herein and as provided for and set forth in the IFB.

- 4.2 Contractor and Santa Cruz METRO agree to comply with and fulfill all obligations, promises, covenants and conditions imposed upon each of them in the Contract Documents. All of said work done under this Contract shall be performed to the satisfaction of Santa Cruz METRO or its representative, who shall have the right to reject any and all materials and supplies furnished by Contractor which do not strictly comply with the requirements contained herein, together with the right to require Contractor to replace any and all work furnished by Contractor which shall not either in workmanship or material be in strict accordance with the Contract Documents.

5. COMPENSATION

5.1 Terms of Payment

Santa Cruz METRO agrees to pay Contractor an amount not to exceed Five Hundred Fifty-Three Thousand, Three Hundred Forty-Nine Dollars (\$553,349) as identified in the Bid Form, Exhibit B, for satisfactory completion of all work, including all costs for labor, materials, tools, equipment, services, freight, insurance, overhead, profit and all other costs incidental to the performance of the services specified under this Contract. A schedule of values shall be submitted to Santa Cruz METRO on which all progress payments shall be based. Payments for completed work will be made within thirty (30) days of receipt of progress payment request. Contractor understands and agrees that if it exceeds the \$553,349 maximum amount payable under this Contract, it does so at its own risk.

5.2 Release of Claims

Payment by Santa Cruz METRO of undisputed contract amounts is contingent upon Contractor furnishing Santa Cruz METRO with a Release of All Claims against Santa Cruz METRO arising by virtue of the part of the Contract related to those amounts.

5.3 Retention of progress payments

Santa Cruz METRO will retain five (5%) percent of the contract price from each progress payment made pursuant to the Contract through the completion of the Contract. The retention shall be released, with the exception of 150 percent (150%) of any disputed amount, within 60 days after the date of completion of the work. Pursuant to Section 22300 of the Public Contract Code, Contractor may substitute a deposit of securities in lieu of Santa Cruz METRO withholding any monies to ensure Contractor's performance under the Contract, or alternatively, request that Santa Cruz METRO make payment of retentions earned directly to an escrow agent at the expense of Contractor. The provisions of Public Contract Code Section 22300 are incorporated herein by reference as though set forth in full, and shall govern the substitution of securities and/or escrow account. If a Stop Notice is filed, Santa Cruz METRO will retain 125% of the amount set forth in the Stop Notice from the next progress payment made to Contractor.

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5.4 Change in Contract Price

5.4.1 General

- A. The Contract price constitutes the total compensation payable to Contractor for performing the work. All duties, responsibilities, and obligations assigned to or undertaken by Contractor to perform the work shall be at Contractor's expense without change in the Contract price.
- B. The Contract price may only be changed by a change order. Any request for an increase in the Contract price shall be based on written notice delivered by the Contractor to the Contract Administrator promptly, but in no event later than 10 days after the date of the occurrence of the event giving rise to the request, and shall state the general nature of the request. Notice of the amount of the request with supporting data shall be delivered within 45 days after the date of the occurrence, unless the Contract Administrator allows an additional period of time to ascertain more accurate data in support of the request, and shall be accompanied by the Contractor's written statement that the amount requested covers all amounts (direct, indirect, and consequential) to which the Contractor is entitled as a result of the occurrence of the event. No request for an adjustment in the Contract price will be valid if not submitted in accordance with this Article.
- C. The value of any work covered by a change order or of any request for an increase or decrease in the Contract price shall be determined in one of the following ways:
 1. Where the work involved is covered by unit prices contained in the Contract documents, by application of unit prices to the quantities of the items involved; or
 2. By mutual acceptance of a lump sum, which may include an allowance for overhead and profit not necessarily in accordance with Article 5.4.4; or
 3. On the basis of the cost of work (determined as provided in Articles 5.4.2 and 5.4.3) plus a Contractor's fee for overhead and profit (determined as provided in Article 5.4.4).

5.4.2 Cost of Work (Based on Time and Materials)

- A. General: The term "cost of work" means the sum of all costs necessarily incurred and paid by Contractor for labor, materials, and equipment in the proper performance of work. Except as otherwise may be agreed to in writing by Santa Cruz METRO, such costs shall be in amounts no higher than those prevailing in the locality of the project.
- B. Labor: The cost of labor used in performing work by Contractor, a subcontractor, or other forces, will be the sum of the following:
 1. The actual wages paid plus any employer payments to or on behalf of workers for fringe benefits, including health and welfare, pension, vacation, and similar purposes. The cost of labor may include the wages paid to foremen when it is

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determined by the Contract Administrator that the services of foremen do not constitute a part of the overhead allowance.

2. There will be added to the actual wages, as defined above, a percentage set forth in the latest "Labor Surcharge and Equipment Rental Rates" in use by the California State Department of Transportation which is in effect on the date upon which the work is accomplished. This percentage shall constitute full compensation for all payments imposed by State and Federal laws including, but not limited to, workers' compensation insurance and Social Security payments.
 3. The amount paid for subsistence and travel required by collective bargaining agreements.
 4. For equipment operators, payment for the actual cost of labor and subsistence or travel allowance will be made at the rates paid by Contractor to other workers operating similar equipment already on the work, or in the absence of such labor, established by collective bargaining agreements for the type of workers and location of the extra work, whether or not the operator is actually covered by such an agreement. A labor surcharge will be added to the cost of labor described herein in accordance with the provisions of subsection 2 of Article 5.4.2 B herein, which surcharge shall constitute full compensation for payments imposed by State and Federal laws, and all other payments made to on behalf of workers other than actual wages.
- C. Materials: The cost of materials used in performing work will be the cost to the purchaser, whether Contractor or subcontractor, from the supplier thereof, except as the following are applicable:
1. Trade discounts available to the purchaser shall be credited to Santa Cruz METRO notwithstanding the fact that such discounts may not have been taken by Contractor.
 2. For materials secured by other than a direct purchase and direct billing to the purchaser, the cost shall be deemed to be the price paid to the actual supplier as determined by the Contract Administrator. Markup, except for actual costs incurred in the handling of such materials, will not be allowed.
 3. Payment for materials from sources owned wholly or in part by the purchaser shall not exceed the price paid by the purchaser for similar materials from said sources on extra work items or the current wholesale price for such materials delivered to the work site, whichever price is lower.
 4. If, in the opinion of the Contract Administrator, the cost of material is excessive, or the Contractor does not furnish satisfactory evidence of the cost of such material, then the cost shall be deemed to be the lowest current wholesale price for the quantity concerned delivered to the work site, less trade discount. Santa Cruz METRO reserves the right to furnish materials for the extra work and no claim shall be made by the Contractor for costs and profit on such materials.

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- D. Equipment: The Contractor will be paid for the use of equipment at the rental rate listed for such equipment specified in the current edition of the Department of Transportation publication entitled “Labor Surcharge and Equipment Rental Rates” which is in effect on the date upon which the work is accomplished. Such rental rates will be used to compute payments for equipment whether the equipment is under the Contractor’s control through direct ownership, leasing, renting, or another method of acquisition. The rental rate to be applied for use of each item of equipment shall be the rate resulting in the least total cost to Santa Cruz METRO for the total period of use. If it is deemed necessary by the Contractor to use equipment not listed in the foregoing publication, the Contract Administrator will establish an equitable rental rate for the equipment. The Contractor may furnish cost data that might assist the Contract Administrator in the establishment of the rental rate.
1. The rental rates paid, as above provided, shall include the cost of fuel, oil, lubrication supplies, small tools, necessary attachments, repairs and maintenance of all kinds, depreciation, storage, insurance, and all incidentals. Operators of equipment will be separately paid for as provided in subsection 4 of Article 5.4.2 B.
 2. All equipment shall be in good working condition and suitable for the purpose for which the equipment is to be used.
 3. Before construction equipment is used on the extra work, Contractor shall plainly stencil or stamp an identifying number thereon at a conspicuous location, and shall furnish to the Contract Administrator, in duplicate, a description of the equipment and its identifying number.
 4. Unless otherwise specified, manufacturer’s ratings and manufacturer-approved modifications shall be used to classify equipment for the determination of applicable rental rates. Equipment which has no direct power unit shall be powered by a unit of at least the minimum rating recommended by the manufacturer.
 5. Individual pieces of equipment or tools having a replacement value of \$500 or less, whether or not consumed by use, shall be considered to be small tools and no payment will be made therefore.
- E. Owner-Operated Equipment: When owner-operated equipment is used to perform work and is to be paid for as extra work, Contractor will be paid for the equipment and operator as follows:

Payment for the equipment will be made in accordance with the provisions in Article 5.4.2 D, “Equipment.”

Payment for the cost of labor and subsistence or travel allowance will be made at the rates paid by Contractor to other workers operating similar equipment already on the project, or, in the absence of such other workers, at the rates for such labor established by collective bargaining agreement for type of worker and location of the work, whether or not the owner-operator is actually covered by such an

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agreement. A labor surcharge will be added to the cost of labor described herein, in accordance with the provisions in subsection 2 of Article 5.4.2 B, "Labor."

To the direct cost of equipment rental and labor, computed as provided herein, will be added the markup for equipment rental and labor as provided in Article 5.4.4, "Contractor's Fee."

- F. **Equipment Time:** The rental time to be paid for equipment on the work shall be the time the equipment is in productive operation on the work being performed and shall include the time required to move the equipment to the new location and return it to the original location or to another location requiring no more time than that required to return it to its original location; except that moving time will not be paid if the equipment is used on other than the extra work. Loading and transporting costs will be allowed, in lieu of moving time, when the equipment is moved by means other than its own power. No payment will be made for loading and transporting costs when the equipment is used at the site of the extra work on other than the extra work. The following shall be used in computing the rental time of equipment on the work:
1. When hourly rates are listed, any part of an hour less than 30 minutes of operation shall be considered to be ½-hour of operation, and any part of an hour in excess of 30 minutes will be considered 1-hour of operation.
 2. When daily rates are listed, operation for any part of a day less than 4 hours shall be considered to be ½-day of operation.
 3. Rental time will not be allowed while equipment is inoperative due to breakdowns or Contractor-caused delays.
- G. **Cost of Work Documentation:** The Contractor shall furnish the Contract Administrator Daily Extra Work Reports on a daily basis covering the direct costs of labor and materials and charges for equipment whether furnished by Contractor, subcontractor, or other forces. Santa Cruz METRO will provide the Daily Extra Work Report forms to Contractor. The Contractor or an authorized agent shall sign each Daily Extra Work Report. The Daily Extra Work Report shall provide names and classifications of workers and hours worked; size, type, and identification number of equipment; and the hours operated. Copies of certified payrolls and statement of fringe benefit shall substantiate labor charges. Valid copies of vendor's invoices shall substantiate material charges.

The Contract Administrator will make any necessary adjustments. When these reports are agreed upon and signed by both parties, they shall become the basis of payment for the work performed, but shall not preclude subsequent adjustment based on a later audit.

The Contractor shall inform the Contract Administrator when extra work will begin so that the Santa Cruz METRO inspector can concur with the Daily Extra Work Reports. Failure to conform to these requirements may impact the Contractor's ability to receive proper compensation.

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5.4.3 Special Services

Special services are defined as that work characterized by extraordinary complexity, sophistication, or innovations, or a combination of the foregoing attributes that are unique to the construction industry. The following may be considered by the Contract Administrator in making estimates for payment for special services:

- A. When the Contract Administrator and the Contractor, by agreement, determine that a special service is required which cannot be performed by the forces of the Contractor or those of any of its subcontractors, the special service may be performed by an entity especially skilled in the work to be performed. After validation of invoices and determination of market values by the Contract Administrator, invoices for special services based upon the current fair market value thereof may be accepted without complete itemization of labor, material, and equipment rental costs.
- B. When Contractor is required to perform work necessitating special fabrication or machining process in a fabrication or a machine shop facility away from the jobsite, the charges for that portion of the work performed at the offsite facility may, by agreement, be accepted as a special service and accordingly, the invoices for the work may be accepted without detailed itemization.
- C. All invoices for special services will be adjusted by deducting all trade discounts offered or available, whether the discounts were taken or not. In lieu of the allowances for overhead and profit on labor, materials, and equipment specified in Article 5.4.4 herein, a single allowance of ten (10) percent will be added to invoices for special services.

5.4.4 Contractor's Fee

- A. Work ordered on the basis of time and materials will be paid for at the actual and necessary cost as determined by the Contract Administrator, plus allowances for overhead and profit, which allowances shall constitute the "Contractor's Fee," except as provided in subparagraph B of this Article. For extra work involving a combination of increases and decreases in the work, the actual necessary cost will be the arithmetic sum of the additive and deductive costs. The allowance for overhead and profit shall include compensation for superintendence, bond and insurance premiums, taxes, all field and home office expenses, and all other items of expense or cost not included in the cost of labor, materials, or equipment provided for under Articles 5.4.2 B, C, D, and E herein. The allowance for overhead and profit will be made in accordance with the following schedule:

Actual Necessary Cost	Overhead and Profit Allowance
Labor	33 percent
Materials.....	15 percent
Equipment	15 percent

- B. Labor, materials, and equipment may be furnished by the Contractor or by the subcontractor on behalf of the Contractor. When a subcontractor performs all or any part of the extra work, the allowance specified in subparagraph A of

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Article 5.4.4 shall only be applied to the labor, materials, and equipment costs of the subcontractors, to which the Contractor may add 5 percent of the subcontractor's total cost for the extra work. Regardless of the number of hierarchical tiers of subcontractors, the 5 percent increase above the subcontractor's total cost, which includes the allowances for overhead and profit specified herein, may be applied one time only for each separate work transaction.

5.4.5 Compensation for Time Extensions

Adjustments in compensation for time extension will be allowed only for causes in Article 5.5.1 B.1 through Article 5.5.1 B.3 computed in accordance with Article 5.4 and the following. No adjustments in compensation will be allowed when Santa Cruz METRO-caused delays to a controlling item of work and Contractor-caused delays to a controlling item of work occur concurrently or for causes in Article 5.5.1 B.4 through Article 5.5.1 B.5.

5.5 Change of Contract Time

5.5.1 General

A. The Contract time may only be changed by a change order. Any request for an extension of the Contract time shall be based on written notice delivered by the Contractor to the Contract Administrator promptly, but in no event later than 10 days after the date of the occurrence of the event giving rise to the request, and shall state the general nature of the request. Notice of the extent of the request with supporting data shall be delivered within 45 days after the date of such occurrence, unless the Contract Administrator allows an additional period of time to ascertain more accurate data in support of the request, and shall be accompanied by the Contractor's written statement that the adjustment requested is the entire adjustment to which the Contractor has reason to believe it is entitled as a result of the occurrence of said event. No request for an adjustment in the Contract time will be valid if not submitted in accordance with the requirements of this Article.

The Contract time will only be extended when a delay occurs which impacts a controlling item of work as shown on the work schedules required in the Special Provisions. Time extensions will be allowed only if the cause is beyond the control and without the fault or negligence of the Contractor. Time extensions will also be allowed when Santa Cruz METRO-caused delays to a controlling item of work and Contractor-caused delays to a controlling item of work occur concurrently. The Contractor will be notified if the Contract Administrator determines that a time extension is not justified.

B. The Contract time will be extended in an amount equal to time lost due to delays beyond the control of the Contractor if a request is made therefore as provided in this Article. An extension of Contract time will only be granted for days on which the Contractor is prevented from proceeding with at least 75 percent of the normal labor and equipment force actually engaged on the said work, by said occurrences or conditions resulting immediately therefrom which impact a controlling item of work as determined by the Contract Administrator. Such delays shall include:

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1. Changes.
2. Failure of Santa Cruz METRO to furnish access, right of way, completed facilities of related projects, drawings, materials, equipment, or services for which Santa Cruz METRO is responsible.
3. Survey error by Santa Cruz METRO.
4. Occurrences of a severe and unusual nature including, but not restricted to, acts of God, fires, other force majeure events, and excusable inclement weather. A force majeure event includes an earthquake, flood, cloudburst, cyclone or other cataclysmic phenomena of nature beyond the power of the Contractor to foresee or to make preparation in defense against, but does not include ordinary inclement weather. Excusable inclement weather is any weather condition, the duration of which varies in excess of the average conditions expected, which is unusual for the particular time and place where the work is to be performed, or which could not have been reasonably anticipated by the Contractor, as determined from U.S. Weather Bureau records for the preceding 3-year period or as provided for in the Special Provisions.
5. Act of the public enemy, act of another governmental entity, public utility, epidemic, quarantine restriction, freight embargo, strike, or labor dispute. A delay to a subcontractor or supplier due to the above circumstances will be taken into consideration for extensions to the time of completion.

5.5.2 Extensions of Time for Delay Due to Excusable Inclement Weather

- A. The Contract time will be extended for as many days in excess of the average number of days of excusable inclement weather, as defined in Article 5.5.1 B.5, as the Contractor is specifically required under the Special Provisions to suspend construction operations, or as many days as the Contractor is prevented by excusable inclement weather, or conditions resulting immediately therefrom, from proceeding with at least 75 percent of the normal labor and equipment force engaged on critical items of work as shown on the schedule.
- B. Should the Contractor prepare to begin work at the regular starting time at the beginning of any regular work shift on any day on which excusable inclement weather, or the conditions resulting from the weather, prevents work from beginning at the usual starting time and the crew is dismissed as a result thereof, the Contractor will be entitled to a 1-day extension whether or not conditions change thereafter during said day and the major portion of the day could be considered to be suitable for such construction operations.
- C. The Contractor shall base the construction schedule upon the inclusion of the number of days of excusable inclement weather specified in the Article titled "Excusable Inclement Weather Delays," of the Special Provisions. No extension of the Contract time due to excusable inclement weather will be considered until after the said aggregate total number of days of excusable inclement weather has been reached; however, no reduction in Contract time would be made if said number of days of excusable inclement weather is not reached.

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5.6 Changed Site Conditions

If any work involves digging trenches or other excavations below the surface, Contractor shall promptly, and before the following conditions are disturbed, notify Santa Cruz METRO in writing of any:

- A. Material that Contractor believes may be a regulated material which is required to be removed to a Class I, Class II, or Class III disposal site in accordance with provisions of existing law.
- B. Subsurface or latent physical conditions at the site differing from those indicated in this Contract.
- C. Unknown physical conditions at the site of any unusual nature, different materially from those ordinarily encountered and generally recognized as inherent in work of the character provided for in the Contract.

Santa Cruz METRO will promptly investigate the condition and if it finds that the conditions do materially so differ, or do involve regulated material, and cause a decrease or increase in the Contractor's cost of, or the time required for, performance of any part of the work, Santa Cruz METRO will issue a change order under the procedures described in this Contract. For regulated materials, Santa Cruz METRO reserves the right to use other forces for exploratory work to identify and determine the extent of such material and for removing regulated material from such areas.

In the event that a dispute arises between Santa Cruz METRO and the Contractor on whether the conditions materially differ or on the Contractor's cost of, or time required for, performance of any part of the work, the Contractor shall not be excused from any scheduled completion date provided for by this Contract but shall proceed with all work to be performed under the Contract. The Contractor shall retain any and all rights provided either by this Contract or by law, which pertain to the resolution of disputes and protests between the contracting parties.

5.7 Waivers and Releases

Contractor is required to provide unconditional waivers and releases of stop notices in accordance with California Civil Code §3262(d)(2). Santa Cruz METRO agrees to pay Contractor within 30 days after receipt of an undisputed and properly submitted payment request from Contractor. If Santa Cruz METRO fails to make such payments in a timely manner, Santa Cruz METRO shall pay interest to Contractor equivalent to the legal rate set forth in Subdivision (a) of Section 685.010 of the Code of Civil Procedure. For purposes of this section, "progress payment" includes all payments due Contractor, except that portion of the final payment designated by the Contract as retention earnings. Any payment request determined not to be a proper payment request suitable for payment shall be returned to Contractor as soon as practicable, but not later than seven days after receipt. A request returned pursuant to this paragraph shall be accompanied by a written explanation of why the payment request is not proper. The number of days available to Santa Cruz METRO to make a payment without incurring interest pursuant to this section shall be reduced by the number of days by which Santa Cruz METRO exceeds the seven-day return requirement set forth above. A payment request shall be considered properly executed if funds are available for

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payment of the payment request and payment is not delayed due to an audit inquiry by Santa Cruz METRO's financial officer.

6. NOTICES

All notices under this Contract shall be in writing and shall be effective when received, if delivered by hand, or three (3) days after posting if sent by registered mail, return 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/General Manager

CONTRACTOR

Central Electric Company
430 Walker Street
Watsonville, CA 95076

Attention: Tony Kulich, President
(831) 251-7100
tony@centralelectriccompany.com

7. ENTIRE AGREEMENT

7.1 This Contract represents the entire agreement of the parties with respect to the subject matter hereof, and all such agreements entered into prior hereto are revoked and superseded by this Contract, and no representations, warranties, inducements or oral agreements have been made by any of the parties except as expressly set forth herein, or in other contemporaneous written agreements.

7.2 This Contract may not be changed, modified or rescinded except in writing, signed by all parties hereto, and any attempt at oral modification of this Contract shall be void and of no effect.

8. 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

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Contract may be executed in two or more counterparts, all of which constitute one and the same instrument.

9. 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.

Signed on _____

7-19-19

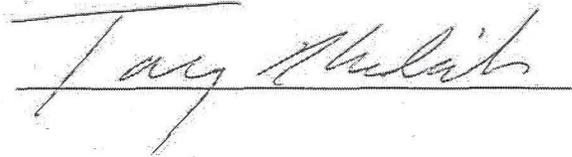
Santa Cruz METRO –
SANTA CRUZ METROPOLITAN TRANSIT
DISTRICT

Alex Clifford, CEO/General Manager



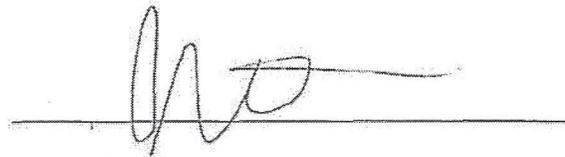
Contractor –
DUFOUR INCORPORATED d/b/a
CENTRAL ELECTRIC COMPANY

Tony Kulich, President



Approved as to Form:

Julie A. Sherman, General Counsel



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DATE: August 23, 2019
TO: Board of Directors
FROM: Jayme Ackemann, Marketing, Communications and Customer Service Director
SUBJECT: AUTHORIZE A PUBLIC HEARING ON A FIXED ROUTE FREE FARE PROGRAM FOR LEGALLY BLIND CUSTOMERS

I. RECOMMENDED ACTION

That the Board of Directors authorize a public hearing for the September 27, 2019 board meeting on a proposal to add a free fare for legally blind fixed route customers

II. SUMMARY

- This report provides information and background on the proposed free fare program to enhance use of fixed-route bus services for customers with qualifying visual impairments. While Santa Cruz Metropolitan Transit District (METRO) provides meaningful access to its transit service to customers with visual impairments, it does not want METRO's currently available technology to purchase tickets to limit a customer with a qualifying visual impairment's use of METRO.
- The accompanying resolution sets a public hearing date to take action on the proposed change to METRO's fare policy, which is intended to better serve customers with qualifying visual impairments.

III. DISCUSSION/BACKGROUND

METRO works closely with Santa Cruz County's Americans with Disabilities Act (ADA) Commission to ensure that its system can be used by all customers.

Over the span of several years, METRO has received reports from legally blind customers that METRO's ticket vending machines (TVMs) present issues related to the user's experience. While there are other methods to pay for METRO fares, TVMs are the only way to physically purchase tickets when customer service representatives are off duty. METRO has worked diligently and collaboratively with the TVM vendor (GFI) and members of the legally blind community to respond to these reported concerns.

Although some improvements have been reported, and despite METRO's best efforts, we continue to receive reported concerns regarding the use of the TVMs for individuals with visual impairments.

In the interest of best serving this community, METRO is proposing a free fare program for customers who can provide medical certification that they are “legally blind.” The program would be discontinued once METRO has the funding to replace its existing TVMs or substitute other new technologies (e.g., mobile ticketing applications) in their place.

Legal blindness is a designation used by government agencies when evaluating who is eligible for certain disability and other benefits. Customers meeting this designation will be able to apply for a special pass that indicates to the bus operator that they may ride for free. These passes will be available to qualifying customers, whether they are local to the Santa Cruz and the Bay Area, or visitors from other areas. No customer with a qualifying visual impairment is required to apply for the special pass to use METRO's transit service, as they may continue to purchase tickets from customer service representatives or use other available methods if they choose to pay for transit services on METRO.

IV. FINANCIAL CONSIDERATIONS/IMPACT

Staff believes the potential financial impact is negligible based on the small number of legally blind residents currently residing in Santa Cruz County. According to the 2017 American Community Survey, which collects data on Americans with disabilities, there are 6,171 individuals with a visual disability and 63,408 individuals with any type of disability living in Santa Cruz County.

METRO served more than 5 million trips in 2018. Approximately 12.7% of those trips were taken by individuals with any type of qualifying disability or older adults eligible for the discount fare.

V. ALTERNATIVES CONSIDERED

- Replace all TVMs – Not feasible due to lack of funding. The projected cost of replacement is approximately \$1,000,000.
- Eliminate all TVMs – Eliminates a vital option for customers needing to purchase tickets after hours and on weekends when the Customer Information Booth is not staffed.
- No Change – Certain members of the visually impaired community report continuing difficulties using TVMs that would not be addressed.

VI. ATTACHMENTS

None

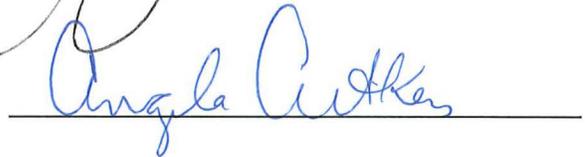
Prepared by: Jayme Ackemann, Marketing, Communication and Customer Service Director

V. APPROVALS

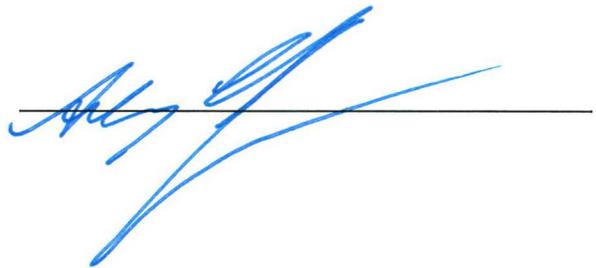
Jayne Ackemann, Marketing,
Communications & Customer Service
Director



Approved as to fiscal impact:
Angela Aitken, CFO



Alex Clifford, CEO/General Manager



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DATE: August 23, 2019
TO: Board of Directors
FROM: Barrow Emerson, Planning & Development Director
**SUBJECT: RECEIVE AN UPDATE ON THE SCCRTC RAIL CORRIDOR
ALTERNATIVE ANALYSIS STUDY SCOPE OF WORK**

I. RECOMMENDED ACTION

That the Board of Directors receive an update on the SCCRTC's Alternatives Analysis scope of work for the Santa Cruz County Rail Corridor

II. SUMMARY

- The Unified Corridor Investment Study (UCIS), an analysis of potential multi-modal transportation investments in State Route 1 (SR 1), Soquel Avenue/Soquel Drive/Freedom Boulevard, and the Santa Cruz Branch Rail Line Rail Corridor, concluded with direction from the Santa Cruz County Regional Transportation Commission (RTC) to perform an alternatives analysis (AA) to determine the most appropriate mode of high-capacity public transit to be planned for the Rail Corridor.
- The Santa Cruz Metropolitan Transit District (METRO) staff participated in the development of public transit networks for the UCIS and has continued to work with RTC staff to develop the scope of work for analysis in the AA.
- Key points for METRO in the AA include:
 - Determining whether Santa Cruz County has the financial capacity to fund both the capital and operational aspects of additional public transit services and facilities without negatively impacting the funding of the current bus system.
 - Analyzing in detail the operating characteristics of various high-capacity public transit alternatives to determine whether they are viable solutions to meet regional transportation and environmental goals.
- At its June 14, 2019 meeting, the Capital Projects Standing Committee received this report and directed it to the full Board for approval.
- At its June 27, 2019 meeting, the RTC received public, stakeholder, and Commissioner input and directed its staff to modify the scope of work in response.

- At its August 1, 2019 meeting, the RTC approved a final scope of work (Attachment A) for the UCIS AA and directed staff to release a Request for Proposals (RFP).

III. DISCUSSION/BACKGROUND

The RTC conducted the UCIS, an analysis of potential multimodal transportation investments in the SR 1, Soquel Avenue/Soquel Drive/Freedom Boulevard, and the Santa Cruz Branch Rail Line Rail Corridor corridors.

At the conclusion of the UCIS in January 2019, the RTC directed staff to conduct an AA to determine which mode of high capacity public transit was the most appropriate to meet mobility and environmental goals of the County.

In March 2019, RTC and METRO staff began meeting weekly to construct a scope of work and an RFP for the AA. Discussions at these meetings contributed to a scope of work that includes the following analyses:

- Value engineering that determines an optimized version of each mode for analysis
- Patronage forecasting
- Capital and operating cost estimates
- Capital and operations funding capacity for public transit in the County in the mid to long-term future

The objective of the AA is to identify multimodal transportation investments that provide the most cost effective use of the Rail Corridor while best serving the community's mobility needs. RTC's Rail Corridor may provide an opportunity to provide cost effective, efficient and environmentally sound high-capacity public transportation options in the County.

At its June 27th meeting, the RTC received public, stakeholder, and Commissioner input and directed its staff to modify the scope of work in response. At its August 1st meeting, the RTC approved a final scope of work for the AA and directed staff to release a Request for Proposals (RFP). The RFP was released on August 5th with proposals due on September 3, 2019. The project will start in late 2019 and is scheduled for completion in early 2021.

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, transportation improvements and services proposed in the AA could

require an increased commitment of METRO services and equipment, the funding sources for which are yet undetermined.

V. ALTERNATIVES CONSIDERED

METRO could not participate in the RTC AA process. As METRO is the County high-capacity public transit provider and has a vested interest in planning that will affect its future commitment of resources, staff does not recommend this alternative.

VI. ATTACHMENTS

Attachment A: AA Scope of Work/RFP

Prepared by: Barrow Emerson, Planning & Development Director

VII. APPROVALS

Barrow Emerson
Planning & Development Director

A handwritten signature in blue ink, appearing to read "Barrow Emerson", written over a horizontal line.

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

A handwritten signature in blue ink, appearing to read "Angela Aitken", written over a horizontal line.

Alex Clifford, CEO/General Manager

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Attachment A

Alternatives Analysis for High Capacity Public Transit on Rail Right of Way Scope of Work

The Regional Transportation Commission (RTC) intends to engage the services of a consultant to produce an Alternatives Analysis and Business Plan for High Capacity Public Transit on the Rail Right-of-Way. Acquisition of the rail line in 2012 provides a unique opportunity for Santa Cruz County to consider a dedicated transit facility that runs the length of the county. The outcome from the 2019 Unified Corridor Investment Study was to reserve the Santa Cruz Branch Rail Line (SCBRL) for high-capacity public transit adjacent to a bicycle and pedestrian trail. The Alternatives Analysis will evaluate public transit investment options that provide an integrated transit network for Santa Cruz County utilizing all or part of the length of the rail right-of-way, between Pajaro Station and Shaffer Road, as a dedicated transit facility, adjacent to the proposed Monterey Bay Sanctuary Scenic Trail (MBSST). Proposed future intercounty and interregional connections to the Bay Area, Monterey, Gilroy and beyond will be considered.

A performance-based planning approach based on a triple bottom line sustainability framework will be utilized to assess various public transit options for the rail right of way. A triple bottom line concept of sustainability balances economic, environmental and equity interests. Transit alternatives will be compared to define a viable project that will provide the greatest benefit to the Santa Cruz County residents, businesses and visitors in terms of equity, environment and economy. The RTC has adopted a sustainability framework through the 2040 Santa Cruz County Regional Transportation Plan (RTP) which is the guiding document for transportation project prioritization. Goal 3 of the 2040 RTP states "Deliver access and safety improvements cost effectively, within available revenues, equitable and responsive to the needs of all users of the transportation system and beneficially for the natural environment." The sustainability framework developed in the 2040 RTP will be followed for this study.

The overall project objectives include:

- Identify, evaluate and compare a range of high-capacity public transit service options for the Santa Cruz Branch Rail Line for a future year of 2035 that can coexist with a bicycle and pedestrian trail within the rail right-of-way
- Serve existing and new transit users with service along the SCBRL between Watsonville and Santa Cruz
- Evaluate an integrated transit network for Santa Cruz County utilizing all or parts of the SCBRL as a dedicated contiguous transit facility
- Evaluate proposed future interregional connections to the San Francisco Bay Area, Monterey, Gilroy and beyond
- Provide information including ridership forecasts, travel time, capital and operating/maintenance costs, revenue projections and funding/financing options as well as other performance measures that advance the triple bottom line of sustainability in terms of equity, environment and economy.
- Provide information on station/boarding locations, passing sidings/lanes and maintenance facilities for transit vehicles
- Evaluate system controls and safety, including positive train control for rail and other systems that would be needed for other services, especially with respect

Attachment A

to at-grade crossings, at the coexistence of a bicycle and pedestrian trail within close proximity of transit vehicles.

- Provide governance options for transit service
- Involve the community, partner agencies, the RTC and METRO in the decision-making process to identify a preferred alternative and next steps
- Identify opportunities to enhance high-capacity transit investment via strategically located transit-oriented land development in urbanized areas.
- Develop a strategic business plan for the selected alternative, including a prototypical cash flow analysis of environmental clearance, right-of-way, design, construction, operations, and maintenance.

The project area includes the Santa Cruz Branch Rail Line from the Pajaro Station outside the City of Watsonville to Shaffer Rd on the west side of Santa Cruz as well as the area encompassed by Santa Cruz METRO's local bus service in order to evaluate an integrated transit network for Santa Cruz County. See **Exhibit 1** for map of the rail corridor showing the proximity to the urban areas of Santa Cruz County including residential and commercial areas as well as parks and beaches. The rail right of way passes within 1 mile of half of the County's population and can provide access to 44 schools and 92 parks.

A travel demand model using the TransCAD platform was developed for Santa Cruz County. The Santa Cruz County travel demand model will be available to the consultant that is awarded the project after a model user agreement has been submitted.

RTC staff and Santa Cruz Metropolitan Transit District (METRO) staff will be working together with the consultants on this project. RTC staff, METRO staff and consultants along with input from the Commission, RTC committees, METRO Board and committees, stakeholders, and public will establish the project goals, performance measures, and project alternatives to consider for implementation on this corridor. The public has shown substantial interest in the rail right of way and how best to utilize this facility. A stakeholder/public outreach strategy that engages the various communities of this county is critical to this study. The RTC will consider moving towards environmental review of the preferred alternative that follows the Alternatives Analysis. One purpose of performing this analysis is to provide a reasonably narrow project definition of the preferred transit project for future environmental review, based on the work performed in this planning study.

The hired consultant will perform the following scope of work.

SCOPE OF SERVICES

Task 1: Project Management and Coordination

Task 1.1: Project Kick Off Meeting

Consultant will participate in a project kick-off meeting with the project team to review the details of the scope of work, project schedule and deliverables. This meeting shall take place in Santa Cruz. The goals of the study, performance

Attachment A

measures, projects and alternatives to be analyzed, transportation modeling tools and any other methodologies that will be needed to perform an alternatives analysis will be discussed. The project team will also discuss previously completed studies relevant to this project.

Deliverable 1.1.1: Initial project schedule, meeting agenda and minutes.

Task 1.2: Biweekly Check-Ins and Written Progress Reports

Consultant will hold conference calls every 2 weeks with Regional Transportation Commission (RTC) and METRO staff to present progress and status of tasks. Written progress reports will be submitted monthly to the RTC contract manager with each invoice. Each report should be sufficiently detailed for the contract manager to determine if the consultant is performing to expectations and is on schedule, percentage of budget spent and achievement of overall study objectives. Reports will also contain a summary of obstacles and issues, recommended solution or course of action, and a timeline for resolution. Additional conference calls with RTC and METRO staff will be scheduled as needed to address timely issues in an effort to maintain the project schedule.

Deliverable 1.2.1: Biweekly meeting agendas and conference calls

Deliverable 1.2.2: Monthly schedule updates

Deliverable 1.2.3: Written progress reports with each invoice

Task 2: Review Relevant Studies and Develop Outreach Plan

Task 2.1: Review Previous Studies Relevant to Project

Consultant shall review previous rail, transit and other relevant studies including the Unified Corridor Investment Study (2019), the State Rail Plan (2018), Santa Cruz Branch Rail Line Rail Transit Feasibility Study (2015), the 2040 Santa Cruz County Regional Transportation Plan, AMBAG 2040 Sustainable Communities Strategy/Metropolitan Transportation Plan, the 2019 METRO Onboard Transit Study, Watsonville Transit Planning Study (2011), the Santa Cruz Metro Short Range Transit Plan (2014), METRO 10-Year Strategic Business Plan (2019), METRO Long Range Bus Replacement Plan (2019), Zero Emissions Bus Implementation Plan (2019), 2019 METRO On-Board Transit Survey, Major Transportation Investment Study (1999), Santa Cruz Branch Rail Line Bridge Inspection Reports, and Santa Cruz Branch Rail Line Culvert Inspection Report, Around the Bay Rail Study (1998), Transportation Agency for Monterey County (TAMC) studies on rail service including the Monterey Bay Rail Network Integration Study (ongoing) and the Coast Rail Corridor Service Implementation Plan (ongoing). Alternatives Analysis from other regions shall also be reviewed including the Transportation Agency for Monterey County (TAMC) Alternatives Analysis for Caltrain Extension to Monterey County (2009), TAMC Alternatives Analysis for the Monterey Peninsula Fixed Guideway Corridor Study (2012), 2018 Caltrain Business Plan, 2018 High Speed Rail Business Plan.

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Deliverables 2.1.1: List and summarize studies reviewed as they inform pertinent aspects of this analysis.

Task 2.2: Coordinate with TAMC on the Monterey Bay Rail Network Integration Study

Consultant shall coordinate with Transportation Agency for Monterey County (TAMC) and their consultants on the Monterey Bay Rail Network Integration Study (ongoing) and the Coast Rail Corridor Service Implementation Plan (ongoing). Regardless of the high-capacity public transit alternative, coordination on transit service planning with TAMC will allow for consideration of transit interregional connections at Pajaro Station for connectivity to Monterey, the San Francisco Bay Area, and the proposed high-speed rail line at Gilroy and beyond.

Deliverables 2.2.1: Meeting agendas for coordination with TAMC and consultants

Task 2.3: Transit Systems in Similar Communities

Identify rail and bus rapid transit systems in areas similar to Santa Cruz County.

Deliverables 2.2.2: Memorandum on other rail and bus rapid transit systems for comparison

Task 2.4: Develop Public and Stakeholder Outreach Plan

Consultant shall develop a public involvement plan that provides multiple, diverse opportunities for members of the public to participate in the development of the study. Both traditional and nontraditional outreach methods and technologies will be identified to solicit input at key milestones. RTC and METRO staff will develop a stakeholder list with assistance from the consultant that includes partner agencies, community organizations, developers, and business leaders. Community Workshops should target areas adjacent to the rail line and potential station locations and should utilize a combination of presentation, discussion, and interactive exercises. Outreach will include direct solicitation to transportation disadvantaged communities and to organizations who serve traditionally underrepresented, hard-to-reach groups. Milestone Outreach Plan dates shall be integrated into the Task 1 schedule deliverables.

Deliverables 2.4.1: Memorandum containing Public and Stakeholder Outreach Plan

Deliverables 2.4.2: Final Stakeholder list

Task 3: Identify Goals, Performance Measures, and Data Needs

Task 3.1: Develop Goals, Criteria and Performance Measures

Consultant along with RTC and METRO staff will draft goals, criteria and performance measures for the alternatives analysis for the review and input of stakeholders, the public, the RTC Board, and the METRO Board as part of Tasks 5.2, 5.3 and 5.4. The criteria will be used to determine which of the initial alternatives will be evaluated in

Attachment A

the final list. The performance measures will be used to assess the final list of alternatives and to determine the preferred alternative. Performance measures will be based on local, regional, state and federal planning goals that incorporate a sustainability framework based on the triple bottom line of equity, economy, and the environment. Analysis of performance will also include measures that are required for transportation funding programs, including Federal Transit Administration Small Starts and New Starts, the Transit Intercity Rail Program (TIRCP) and State Rail Assistance Program (SRA). Performance measures will assure consistency with best practices and technical feasibility and will consider input from the public, stakeholders, RTC Advisory Committees, and the RTC.

Consultant should consider developing triple bottom line goals, criteria, and performance measures such as:

- Environment
 - Transit ridership (people/day)
 - Vehicle miles traveled
 -
 - Criteria Pollutants
 -
 - Impacts to Biological Resources
 - Key climate vulnerabilities, including greenhouse gas emissions
 - Visual Impacts
 - Noise and Vibration
- Equity
 -
 - Benefits and impacts to disadvantaged communities
 - Transit travel time
 - Transit vehicle miles traveled
 - Transit costs
 - Bicycle capacity on transit
- Economy
 -
 - Funding options, both public and private
 - Project Development and Capital Construction Cost
 - Benefit/Cost
 - Operations and Maintenance Costs
 - Cost/rider
- Other
 - Safety
 - Technical Feasibility
 - Impacts to local traffic at grade crossings
 - Impacts to the Monterey Bay Sanctuary Scenic Trail (rail trail)
 - Right of way preservation

Deliverable 3.1.1: Memorandum with draft goals, criteria and performance measures

Task 3.2: Data Availability & Needs

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After development of goals, the initial screening criteria and performance measures, consultant will identify any data requirements that are needed to perform this study including analysis of how the different transit service alternatives will achieve the goals. Consultant will identify existing data from RTC, METRO, AMBAG, Caltrans, U.S. 2010 Census and American Community Survey and any other sources that would be beneficial for this study. Any data collection efforts to support this analysis will also be identified.

Deliverable 3.2.1: Develop a list of data needs and any data collection efforts needed

Task 3.3: Research and Develop Methodologies for Analysis

The Santa Cruz County travel demand model (SCCModel) will be used by consultant to provide information for the performance measure analysis. The Santa Cruz County Travel Demand Model (SCCModel) is a 4-step travel demand model using the TransCAD platform designed to forecast future travel patterns on both roadway and transit routes throughout Santa Cruz County (SCC). The model can be used to assess how changes in population, employment, demographics and transportation infrastructure affect travel patterns within the county. The model currently has a base year of 2015 and a horizon year for 2035. Data for the SCCModel comes from a multitude of sources including the 2010 Census data, the American Community Survey data, and the Association of Monterey Bay Area Governments (AMBAG) travel demand model. Data used for estimation, calibration and validation of the SCCModel includes the 2012 California Household Travel Survey (CHTS), the 2012 Transit On-Board Survey and traffic count data collected by Caltrans and others.

There are two documents that provide detailed information about the SCCModel, the SCC Model Development Report and the SCC Model User Guide. The Model Development Report provides information on the main input data sources, descriptions of the model components and methodologies, and model calibration and validation results. The SCC Model User Guide provides detailed instructions of how to run the model, and information on the input and output files. These documents are available on the SCCRTC website (<http://sccrtc.org/about/opportunities/rfp/>). The base year for the model was updated to 2015 for the Unified Corridor Study and may be updated to 2018/2019 for the County of Santa Cruz General Plan. Information on the UCS update can be found in Appendix D of the Final Unified Corridor Investment Study (<https://sccrtc.org/projects/multi-modal/unified-corridor-study/>). The RTC expects that consultants will review these materials prior to submitting a proposal.

Additional methodologies and/or postprocessing analysis will also be needed to consider the various performance measures. The consultant will research and develop/utilize methodologies that can be used to forecast the impacts of the transit projects of interest on the performance measures. Consideration should be given to the following in developing the ridership projections, cost estimates, and funding options:

- Fare elasticity analysis
- Station/boarding locations and travel sheds (with and without proposed intercity rail connections to Monterey, Salinas, and Gilroy)

Attachment A

- Number of Transfers
- Trip origins and destinations/trip lengths
- Frequency and span of service
- Station access: pedestrian shed and first mile/last mile services including bus feeders
- The mix of one-way and two-way bus transit on the rail right of way based on value engineering of the capital cost of improvements to the ROW, impacts to the proposed MBSST, and resulting cost/rider
- Weekday and Weekend projections
- Existing and proposed future interregional service
- Compatibility with the MBSST
- Compatibility with local road crossings
- Various vehicle types
- Siding/passing locations
- Maintenance facility locations
- Transit-oriented development
- Condition and service life of existing infrastructure (bridges, culverts, ballast, track, ties, switches, and signals)

Deliverable 3.3.1: Provide tools and document in detail the methods developed to evaluate the transit projects and their effects on the performance measures. Documentation should be in sufficient detail that the analysis can be repeated, and the assumptions and data inputs are clearly understood.

Deliverable 3.3.2: Develop a table listing the methods that will be used to forecast the impacts of each transit alternative on each of the performance measures.

Task 3.4: Collect and Compile Data

Based on the data assessment in Task 3.2, consultant will collect and compile transportation data required for the Alternatives Analysis.

Data collection could include but is not limited to:

- Any data on existing conditions, to be used in analysis for comparison to performance measure forecasts
- Acquire actual travel time and travel time reliability data for existing transit
- Compile injury and collision data by mode within project area
- Map origins and destinations of transportation disadvantaged populations within project area

Deliverable 3.4.1: Provide data that was collected and/or compiled for use in alternatives analysis in a format that is readily utilized. Include source of data and description of how data will be used in the analysis.

TASK 4 Assess Transit Funding Through 2045

Consultant will assess rail and bus transit capital and operating funding capacity through 2045 by consulting the AMBAG MTP/SCS, the SCCRTC RTP, and the UCS and reviewing Federal and State funding opportunities that are realistically available for

Attachment A

transit.

Deliverable 4.1: Forecast of METRO Capital and Operating Funds through 2045

TASK 5 Develop and Evaluate Initial Alternatives

Task 5.1: Develop Initial Transit Alternatives

Consultant will develop along with RTC and METRO staff and input from the public, community organizations, stakeholders, RTC advisory committees, METRO, and the RTC a set of initial high-capacity public transit alternatives for the rail right of way. Some of the initial alternatives are expected to be eliminated so the analysis can focus on a reasonable set of alternatives with greater community interest, financial feasibility, and potential for addressing current and future transportation needs. Initial high-capacity networks for analysis along the rail right-of-way should include, at a minimum various configurations of rail transit and bus rapid transit, along with other feasible alternatives.

Deliverable 5.1.1: Memorandum from consultant providing draft and final initial alternatives with detailed descriptions including maps of routes and potential stations/stops for each transit alternative.

Task 5.2: Goals, Screening Criteria, Performance Measures, and Initial Alternatives ***Input – Partner Agencies***

Consultant will present the draft goals, initial screening criteria, performance measures and initial alternatives at a partner agency meeting to solicit input. Graphical representations including maps and charts will be used to communicate the initial alternatives. Consultant will work with the project team to develop the agenda and materials, including graphical representations such as maps, charts, figures, pictures, and drawings, necessary to effectively communicate the initial alternatives for the partner agency meeting. Outreach will also be performed based on the Outreach Plan (Task 2.3)

Deliverable 5.2.1: Partner agency meeting agenda and minutes

Deliverable 5.2.2: Graphical representations (maps, charts, etc) of goals, initial screening criteria, performance measures, and initial alternatives.

Deliverable 5.2.3: Powerpoint and oral presentation of the draft goals, initial screening criteria, performance measures and initial alternatives designed and prepared by consultant for partner agency meeting.

Task 5.3: Goals, Screening Criteria, Performance Measures, and Initial Alternatives ***Input – Public***

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Consultant will present the draft goals, initial screening criteria, performance measures and initial alternatives at two public workshops (north and south county) to solicit input. Graphical representations including maps and charts will be used to communicate the initial alternatives. Public outreach will also be performed based on the Public Outreach Plan (Task 2.3) including eNews letters, social media, online ads and newspaper ads. RTC and METRO staff will provide public workshop noticing and reserve the workshop locations.

Deliverable 5.3.1: Public Workshop meeting agendas

Deliverable 5.3.2: Revised graphical representations (maps, charts, etc) of goals, initial screening criteria, performance measures, and initial alternatives based on partner agency input.

Deliverable 5.3.3: Two Public Workshops with powerpoint and oral presentation of the draft goals, initial screening criteria, performance measures and initial alternatives designed and prepared by consultant.

Deliverable 5.3.4: Revised list of Goals, Criteria, and Performance Measures, based on partner agency and public input received.

Deliverable 5.3.5: Revised PowerPoint to Reflect Partner Agency and Public Input for use at RTC Meeting.

Task 5.4: Goals, Screening Criteria, Performance Measures, and Initial Alternatives Input - RTC and METRO Meetings

Consultant will present the draft goals, performance measures and initial alternatives at an RTC meeting and a METRO meeting to solicit input. Graphical representations including maps and charts will be used to communicate the initial alternatives.

Deliverable 5.4.1: RTC and METRO Meeting Presentation

Deliverable 5.4.2: Revised list of Goals, Criteria, and Performance Measures, and Initial Alternatives based on RTC and METRO Meeting input received.

Task 5.5: Screen Initial List of Alternatives based on Goals and Criteria and Develop Final List of Alternatives to Evaluate

Consultant will develop the draft final list of alternatives based on the criteria identified in Task 5.1 with input from RTC and METRO staff.

Deliverable 5.5.1: Memorandum of final list of alternatives to be analyzed with a narrative discussing the opportunities and constraints of each alternative and why each was either rejected or will be included in the more detailed analysis.

Task 5.6: Present Final List of Alternatives to Evaluate – METRO and RTC Meetings

Attachment A

Consultant will present the draft final list of alternatives at a METRO meeting and RTC meeting to be evaluated in more detail with the approved performance measures. Graphical representations including maps and charts will be used to communicate the initial alternatives.

Deliverable 5.6.1: Powerpoint and oral presentation of the final alternatives designed and prepared by consultant for both RTC and METRO meetings.

Deliverable 5.6.2: Public Hearing at the RTC meeting to solicit public input on final list of alternatives to evaluate.

Deliverable 5.6.3: Final list of alternatives to evaluate, based on RTC, METRO, Advisory Committees, public, and partner agency input.

Task 6 Conduct Value Engineering including Service Planning to Refine and Further Define Alternatives

Task 6.1: Develop Detailed Descriptions of Final List of Alternatives Utilizing Value Engineering

Performance measure results for the alternatives can vary depending on the service plans, station locations, route structure, number of transfers, passing siding locations, etc. Consultants will utilize value engineering to refine/define the various alternatives with the greatest benefit in terms of travel time and ridership relative to both capital and operations and maintenance cost of service. Consultants will work with the project team to assess range of value engineering to perform. Initial value engineering and service planning for Bus Rapid Transit, based on an initial plan provided by METRO, shall be performed as early as possible in the project schedule.

Consultant will build on the Unified Corridor Investment Study and The Rail Transit Feasibility Study to identify capital, operational and maintenance costs on the final list of alternatives.

Potential examples of alternatives to consider through value engineering include development of one-way or two-way BRT on the rail corridor with consideration for passing sidings or signal-controlled access points to segments with one-way operations; integration of BRT on the rail corridor with service planning for the “bus on shoulders” service on Highway 1; BRT service between Santa Cruz and Watsonville utilizing the rail right of way where beneficial; METRO local service redesign integrated with BRT or rail transit on the rail corridor; and, rail service with consideration of various vehicle types with and without freight.

Deliverable 6.1.1: Document capital, operational, and maintenance costs for transit alternatives.

Deliverable 6.1.2: Provide memo with draft and final results of value engineering for various alternatives based on travel time, ridership and capital and operations & maintenance cost estimates.

Task 7 Conduct Performance Measure Analysis of Final List of Alternatives and Recommend Locally Preferred Alternative

Task 7.1: Perform Analysis of Final List of Alternatives

The consultant will evaluate the transit alternatives building on the previous work of the Unified Corridor Investment Study and Rail Transit Feasibility Study. Performance measures identified in Task 3 will be calculated for the final set of alternatives. Consultant will work with the project team regularly for input on the alternatives analysis. The consultant will document the tools, methods, and data sources used to complete the alternatives analysis.

Deliverable 7.1.1: Results of alternatives analysis including a matrix comparing the results of the performance measures analysis with a narrative discussing the opportunities and constraints of each alternative. Graphical representation of the alternative analysis results will be designed and prepared by consultant including Geographic Information System (GIS) maps, charts and a “performance dashboard”.

Deliverable 7.1.2: Documentation of the technical analysis completed for the alternatives analysis including methods, tools, data sources and assumptions.

Task 7.2: Develop Revenue Projections and Funding Plan

Consultant will build on the Unified Corridor Investment Study, The Rail Transit Feasibility Study and the 2040 Santa Cruz County Regional Transportation Plan to identify local, state, federal, and private “reasonably available” funding sources to implement the final list of alternatives.

Deliverable 7.2.1: Document potential revenue from various sources with an assessment of level of confidence for obtaining each type of funding for each of the final alternatives. Develop plans for how each alternative transit service could potentially be funded.

Task 7.3: Alternatives Analysis Results – Partner Agency Meeting

Consultant will present findings of the alternative analysis results at a partner agency meeting to solicit input on selecting the preferred alternative. The graphical representations of the alternatives analysis including maps, charts and a “performance dashboard” will be used to communicate the analysis results. Consultant will work with the project team to develop the agenda for the partner agency meeting.

Deliverable 7.3.1: Alternatives Analysis partner agency meeting agenda and minutes

Attachment A

Deliverable 7.3.2: PowerPoint and oral presentation of the results of the alternatives analysis designed and prepared by consultant for partner agency meeting.

Task 7.4: Alternatives Analysis Results – Public Input

Consultant will present findings of the alternative analysis results at two public workshops and solicit input from the public on selecting the preferred alternative. Graphical representations of the alternatives analysis including charts and a “performance dashboard” will be used to communicate the analysis results. Public outreach will also be performed based on the Public Outreach Plan (Task 2.3) including eNews letters, social media, online ads and newspaper ads. RTC and METRO staff will perform all outreach associated with public workshop noticing and logistics.

Deliverable 7.4.1: Powerpoint and oral presentation of the results of the alternatives analysis designed and prepared by consultant for two public workshops.

Deliverable 7.4.2: Graphical representations (maps, charts, dashboard) of analysis of alternatives suitable for two public workshops.

Deliverable 7.4.2: Public Outreach based on the Outreach Plan

Task 7.5: Alternative Analysis Results - RTC and METRO meetings

Consultant will present findings of the alternatives analysis results at a METRO meeting and RTC meeting to solicit input on selecting the preferred alternative. The graphical representations of the alternatives analysis including maps, charts and a “performance dashboard” will be used to communicate the analysis results.

Deliverable 7.5.1: Powerpoint and oral presentation with graphical presentations on performance measure results of the final alternatives designed and prepared by consultant for both RTC and METRO meetings.

Deliverable 7.5.2: Public Hearing at the RTC meeting to solicit public input on performance measure results of final list of alternatives.

Task 7.6 Develop Locally Preferred Alternative

In consultation with partners, public, and decision makers, the consultants and RTC staff will recommend a transit project that best achieves corridor goals, referred to as the preferred alternative. The consultant will analyze the preferred alternative and how it performs in advancing the performance measures. The consultant will document the methods and tools used to complete the analysis and the results of the analysis. Comments will be solicited from the public, partner agencies, RTC Committees, METRO and RTC.

Deliverables 7.6.1: Recommendation of locally preferred alternative including detailed documentation, maps, charts and a performance “dashboard”.

Attachment A

Task 8: Alternatives Analysis Report

Task 8.1: Preparation of Administrative Draft

Consultant shall prepare an administrative draft of report that clearly documents the alternatives analysis and how the locally preferred alternative integrates with the regional rail network. Consultant shall submit administrative draft document to RTC and METRO staff. The report should include a detailed description of the analysis completed including any assumptions and limitations to the analysis. Methodologies used for evaluating the alternatives will need to be rigorously documented.

Deliverable 8.1.1: Administrative Draft of Alternatives Analysis for High-Capacity Public Transit on the Santa Cruz Branch Rail Line inclusive of the Rail Network Integration Study

Task 8.2: Draft Report and Presentation for RTC, Public and Partner Agency

Consultant shall address comments received on administrative draft from RTC staff and prepare draft report. RTC staff will solicit comments on the draft document from advisory Committees. Consultant will present the findings of the final alternative analysis results and the draft report of the Alternatives Analysis at a partner agency meeting to solicit input. Consultant will present the findings of the final alternative results and the draft report for the Alternatives Analysis for High-Capacity Public Transit on the Santa Cruz Branch Rail Line to the RTC and METRO. Consultant will consider comments received and make revisions as directed by RTC and METRO.

Deliverable 8.2.1: Draft of Alternatives Analysis for High-Capacity Public Transit on the Santa Cruz Branch Rail Line with Recommendation on Locally Preferred Alternative inclusive of the Rail Network Integration Study

Deliverable 8.2.2: Compiled list of comments from public, partner agency, advisory committees, METRO, and RTC

Deliverable 8.2.3: Meeting agenda, PowerPoint, and oral presentation of draft report at partner agency meeting and meeting minutes

Deliverable 8.2.4: PowerPoint and oral presentation of draft report at RTC and METRO meetings

Deliverable 8.2.5: Public Hearing at the RTC meeting to solicit public input on locally preferred alternative and draft report.

Task 8.3: Final Report

Complete the final report inclusive of how the locally preferred alternative integrates with the regional rail network. Final report will consider comments received from RTC and METRO, RTC Committees, stakeholders, public and RTC and METRO staff on draft document. Include credit of the financial contribution of the Caltrans grant program

Attachment A

and Measure D on the cover of the report. Recommend “Next Steps” for implementation.

Deliverable 8.3.1: Final Report of Alternatives Analysis for High-Capacity Public Transit on the Santa Cruz Branch Rail Line inclusive of the Rail Network Integration Study

TASK 9 Business Plan for Locally Preferred Alternative

Task 9.1 Develop a Business Plan for the Locally Preferred Alternative

Develop a 25-year Business Plan (Horizon year of 2045) for implementation of the Locally Preferred Alternative that includes at a minimum the services provided, governance options, operating plan, marketing strategy and financial plan.

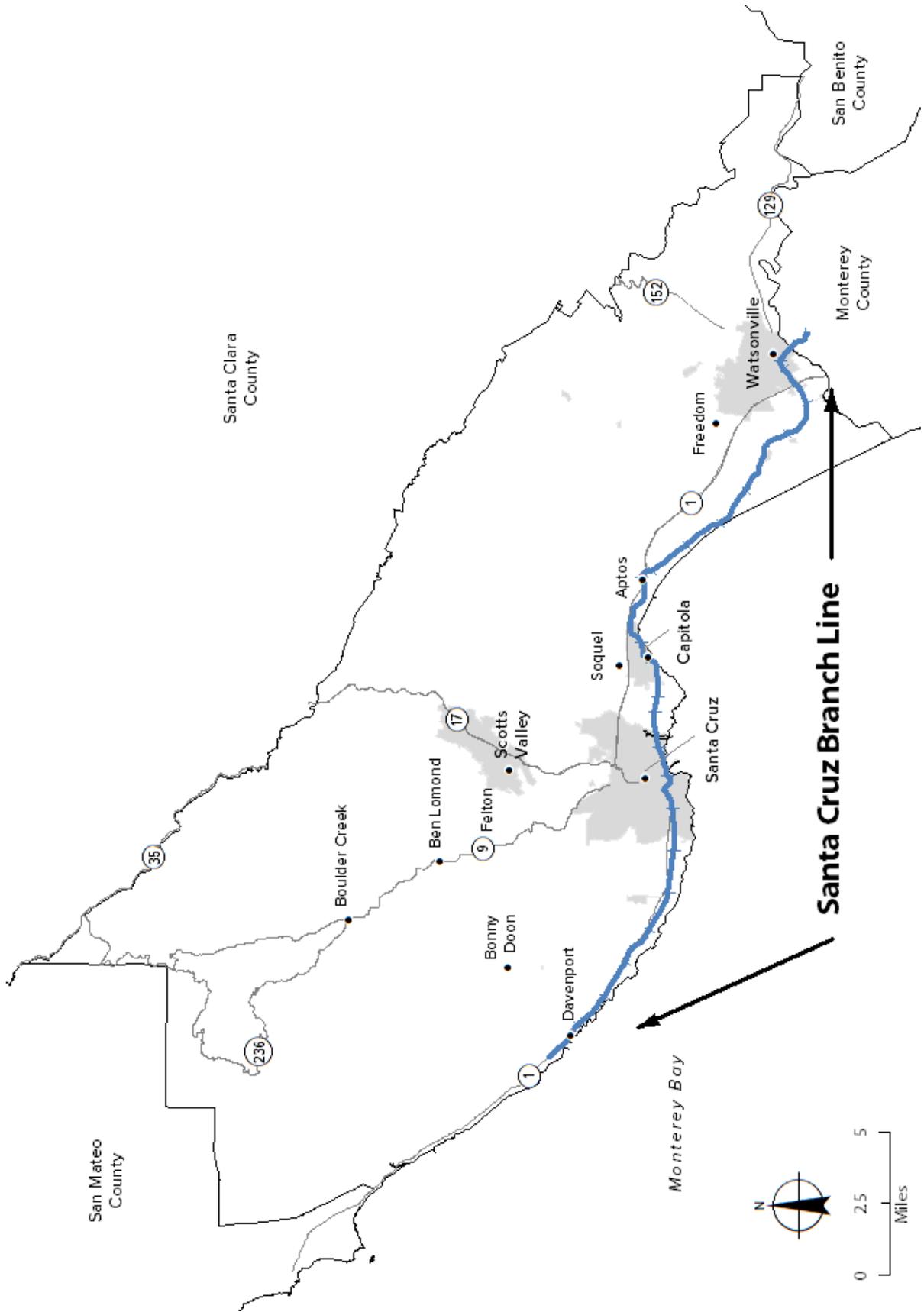
Deliverables 9.1.1: Business Plan for the Locally Preferred Alternative of High Capacity Public Transit on the SCBRL

Summary of Consultant Presentations to Public, Stakeholders, RTC and METRO Board

- Four Public Workshops - 2 workshops for Goals, Criteria, Performance Measures and Initial Alternatives (Task 5.3), public hearing at RTC meeting on Input and Approval on Final Alternatives to be analyzed (5.6), and 2 workshops for Alternatives Analysis Results and input on preferred scenario (Task 7.4)
- Two Stakeholder Meetings – Input on Goals, Performance Measures, Initial Alternatives and Alternatives to be Analyzed (Task 5.3), Alternatives Analysis Results and Input on Preferred Alternative (Task 7.3)
- Three METRO Board Meetings – Input on Goals, Performance Measures and Initial Alternatives (Task 5.4), Input on Final Alternatives to be Analyzed (Task 5.6), Input on Analysis Results and Preferred Alternative (Task 7.5), Input on Final Draft Report and Preferred Alternative (Task 8.2)
- Four RTC Commission Meetings – Input and Approval on Goals, Performance Measures and Initial Alternatives (Task 5.4), Input and Approval on Final Alternatives to be Analyzed (Task 5.6), Input and Approval on Analysis Results and Input on Preferred Alternative (Task 7.5), Input and Approval on Final Draft Report and Preferred Alternative (Task 8.2)

Exhibit 1

Exhibit 1



15A.Exhibit 1.1

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VERBAL PRESENTATION ONLY

PACIFIC STATION UPDATE

Barrow Emerson
Planning & Development Director

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DATE: August 23, 2019
TO: Board of Directors
FROM: Julie Sherman, General Counsel
**SUBJECT: CONSIDERATION OF DECLARING THE COMPENSATION AND
BENEFITS OF METRO EMPLOYEES UNCERTAIN AS OF JULY 1, 2019**

I. RECOMMENDED ACTION

That the Board of Directors adopt a resolution declaring the compensation and benefits of Metro employees uncertain as of July 1, 2019.

II. SUMMARY

- The Santa Cruz Metropolitan Transit District (METRO) is in labor negotiations with its represented employees regarding compensation and benefits.
- The existing labor agreements for the three bargaining units expired on June 30, 2019.
- Adoption of a resolution of uncertainty preserves METRO's ability to pay compensation increases effective as of July 1, 2019 to such employees, should labor negotiations result in such a recommendation.
- The General Counsel recommends that the Board of Directors adopt the resolution.

III. DISCUSSION/BACKGROUND

METRO is in labor negotiations with its represented employees regarding compensation and benefits. The existing labor agreements for the three bargaining units expired on June 30, 2019. This Board meeting of August 23, 2019 is the first regular Board meeting held since the June 30, 2019 expiration date. Adoption of a resolution of uncertainty mitigates potential "gift of public funds" claims because where compensation is not fixed, the compensation employees ultimately earn cannot accurately be deemed "extra compensation." Thus, adoption of the resolution preserves METRO's ability to pay compensation increases effective as of July 1, 2019 to such employees, should labor negotiations result in such a recommendation. The General Counsel recommends that the Board of Directors adopt the attached resolution.

IV. FINANCIAL CONSIDERATIONS/IMPACT

Unknown

V. ALTERNATIVES CONSIDERED

None

VI. ATTACHMENTS

Attachment A: Resolution - Clean Version

Attachment B: Resolution - Redline Version

Prepared By: Julie Sherman, General Counsel

VII. APPROVALS:

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:

RESOLUTION OF THE BOARD OF DIRECTORS OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT DECLARING THE COMPENSATION AND BENEFITS OF METRO EMPLOYEES UNCERTAIN AS OF JULY 1, 2019

WHEREAS, the Santa Cruz Metropolitan Transit District is in labor negotiations with its represented employees regarding compensation and benefits; and

WHEREAS, the existing labor agreements for the three bargaining units expired on June 30, 2019; and

WHEREAS, this Board meeting of August 23, 2019 is the first regular Board meeting held since the June 30, 2019 expiration date.

NOW, THEREFORE, BE IT RESOLVED, by the Board of Directors of the Santa Cruz Metropolitan Transit District that effective July 1, 2019, the compensation of the employees of the Santa Cruz Metropolitan Transit District is uncertain and undetermined, with the understanding that such new compensation for such employees as may be adopted by the Board of Directors may be applied effective as of July 1, 2019, in consideration of services to be provided by these employees henceforth, should labor negotiations result in such a recommendation.

PASSED AND ADOPTED by the Board of Directors of the Santa Cruz Metropolitan Transit District this 23rd Day of August 2019 by the following vote:

AYES: Directors -

NOES: Directors -

ABSTAIN: Directors -

ABSENT: Directors -

APPROVED _____
Board Chair

ATTEST _____
ALEX CLIFFORD
CEO/General Manager

Attachment A

Resolution No. _____
Page 2

APPROVED AS TO FORM

JULIE SHERMAN
General Counsel

Attachment B



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:

RESOLUTION OF THE BOARD OF DIRECTORS OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT DECLARING THE COMPENSATION AND BENEFITS OF METRO EMPLOYEES UNCERTAIN AS OF JULY 1, 2019

WHEREAS, the Santa Cruz Metropolitan Transit District is in labor negotiations with its represented employees regarding compensation and benefits; and

WHEREAS, the existing labor agreements for the three bargaining units expired on June 30, 2019; and

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NOW, THEREFORE, BE IT RESOLVED, by the Board of Directors of the Santa Cruz Metropolitan Transit District that effective July 1, 2019, the compensation of the employees of the Santa Cruz Metropolitan Transit District is uncertain and undetermined, with the understanding that such new compensation for such employees as may be adopted by the Board of Directors may be applied effective as of July 1, 2019, in consideration of services to be provided by these employees henceforth, should labor negotiations result in such a recommendation.

PASSED AND ADOPTED by the Board of Directors of the Santa Cruz Metropolitan Transit District this 23rd Day of August 2019 by the following vote:

AYES: Directors -

NOES: Directors -

ABSTAIN: Directors -

ABSENT: Directors -

APPROVED _____

Board Chair

ATTEST _____

ALEX CLIFFORD
CEO/General Manager

Attachment B

Resolution No. _____
Page 2

APPROVED AS TO FORM

JULIE SHERMAN
General Counsel

- ADDITIONAL MATERIALS DISTRIBUTED
AT BOARD MEETING -

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NEWS CLIPS

June 28, 2019 – August 23, 2019

**SANTA CRUZ
COUNTY
ARTICLES**

NEGOTIATIONS

Bus riders made aware of strife

Union informs passengers of frustration with labor talks

By Elaine Ingalls

eingalls@santacruzsentinel.com
[@sentinel_ela](https://twitter.com/sentinela Elaine on Twitter)

SANTA CRUZ » Metro employees and volunteers handed out fliers to bus riders Wednesday about service problems and who to talk to about them.

Lenore Young, one of the employees handing out fliers, has been a fixed-route bus operator for more than six years. "We're

trying to show there's not enough staffing," Young said.

Dennis Baldwin, also handing out fliers to passers-by, has been a bus driver for nearly 35 years.

Drivers can't be in the driver's seat for more than 10 hours per shift and no more than 13 hours on the clock per shift, according to Young.

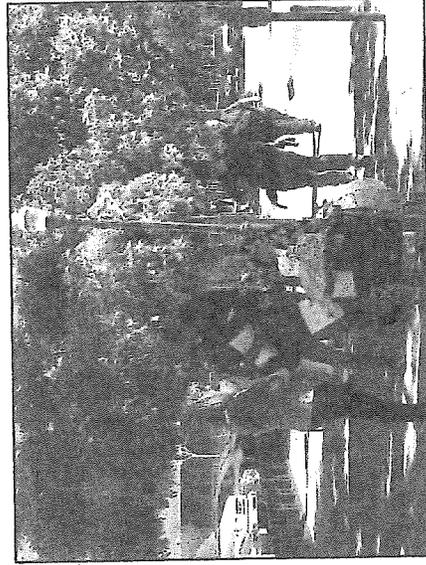
"They blame us for working overtime, then they blame us for not working overtime," Baldwin

said. "Overtime is work. Everybody has to fill in the gap because there's not enough people."

Baldwin said they weren't allowed to be in uniform handing out fliers on Metro property. The union is also sharing fliers through social media.

The Metro Board of Directors voted for the ratification of tentative labor agreements for both fixed route and ParaCruz bus op-

RIDERS » PAGE 4



Metro bus driver Lenore Young hands out fliers to bus riders explaining why bus riders are upset with labor negotiations.

SANTA CRUZ
SENTINEL

Riders

FROM PAGE 3

erators in a meeting Aug. 9, according to Jayme Ackemann, Metro's director of marketing, communications and customer service. Negotiators for ParaCruz voted to ratify the agreement, while negotiators for fixed-route drivers rejected the proposal.

Bus operators are paid time and a half for overtime but can make double time on the seventh day of work, according to Ackemann. Metro is proposing to set all overtime pay at time and a half to not incentivize working a seventh day because Metro believes it is unsafe, she said.

Watsonville resident Maria Martinez awaited the

71 route bus late Wednesday afternoon with her sons, Ray and Mario. She said she has noticed in the past month that the bus has been delayed for about 10 minutes on some afternoon trips and sometimes even longer when it's coming from Watsonville.

James Sandoval, general chairman of bus operator union SMART Local 23, said the union is trying to inform the public about why service problems are happening and why bus operators are upset with labor negotiations. He said SMART Local 23 plans to hold an informational picket at 5 p.m. Monday at the Metro Pacific Station, 920 Pacific Ave., in Santa Cruz.

Contact reporter Elaine Ingalls at 831-706-3253.

TRANSPORTATION & PARKING SERVICES

METRO Service Disruption

August 12, 2019

Please be advised that, due to proposed labor actions by the Santa Cruz METRO bus operators union, there may be impacts to bus service on Monday, August 12, 2019.

We encourage all who regularly use METRO to have a contingency plan in place. Other options include biking or walking (when able), Lyft, Uber, Zipcars, JUMP bikes, providing or sharing a ride with a friend, or connecting with someone through Zimride. We also encourage everyone to arrive to campus early, thereby allowing plenty of time to get to your destination. TAPS will work to develop additional transit and / or parking alternatives for our campus community, and will communicate those as they become available.

Click [here](#) for more information about METRO automatic alerts, or visit <https://www.scmttd.com/en/> for general information regarding METRO services. If you require assistance, please contact METRO's Customer Service at 831-425-8600.

TAPS understands the critical nature of transportation to campus. We will continue to work with METRO to better understand, communicate with you, and ideally mitigate any impacts there might be to our campus community.



LOCAL NEWS

Tuesday, August 13, 2019 » MORE AT FACEBOOK.COM/SCSENTINEL AND TWITTER.COM/SCSENTINEL

TRANSPORTATION

ParaCruz approves tentative labor agreement with Metro

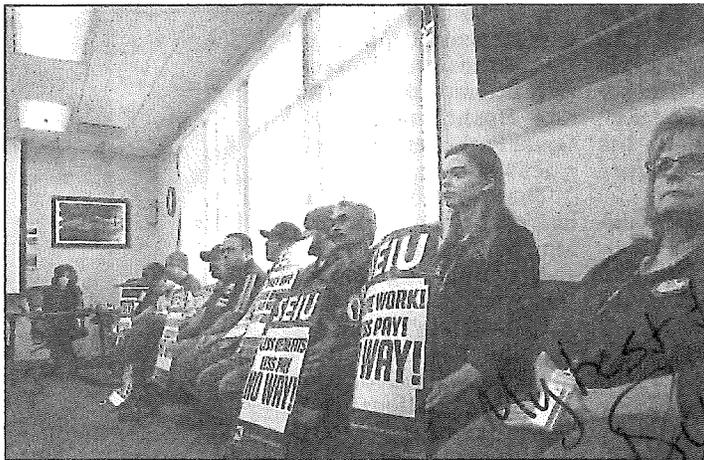
Metro needs to reach agreements with two more employee unions

By Elaine Ingalls
eingalls@santacruzsentinel.com
@sentinel_elaine on Twitter

SANTA CRUZ » Metro has ratified one tentative agreement for the three labor unions to which its employees belong.

Santa Cruz Metro has been in labor negotiations for months with three unions: Sheet Metal Air Rail Transportation (SMART) Local 23 fixed-route, SMART Local 23 ParaCruz and Service Employees International Union (SEIU) Local 521. SEIU Local 521 protects mechanics, accountants, customer service staff and other service staff. SMART Local 23 protects bus operators.

Metro held a special Board of Directors meeting Friday to discuss tentative agreements with labor negotiators. A tentative agreement is the document agreed upon between two parties before an official contract is made.



SEIU — CONTRIBUTED

SEIU members gathered in support for equal pay and benefits in new labor contracts at a Santa Cruz Metro Board of Directors meeting.

Valeria Prigent, communications specialist for Service Employees International Union, or SEIU, Local 521, called it an “issue of inequity.” Executives are seeing a pay increase but employees represented by the union aren’t, she said.

“We don’t feel valued or respected,” Prigent said in a message to the Sentinel.

The Board of Directors voted for the ratification of tentative agreements for both fixed route and ParaCruz bus operators, according to Jayme Ackemann, Metro’s director of marketing, communications and customer service. Labor negotiators for ParaCruz voted for a tentative labor agreement, while negotiators for fixed route rejected the agreement.

Pay and benefits are the two factors that play most in the unions’ decision to reject or approve the agreements, Ackemann said. The tentative agreement for fixed route bus operators is a three-year contract with a 4% pay increase in the first year, a 3% pay increase in the second and a 2.25% increase in the third. For ParaCruz operators, the three-year contract is set to not have a pay increase in the first year, but pay will increase by 3% in the second year and 2.25% in the third.

Under the tentative agreements, fixed route operators will have to pay a 5% minimum toward health care costs, which varies based on the plan each member has. Paracruz operators would pay 3% toward health care starting the third year of their contract.

Bus operators are paid time and a half for overtime but can make double overtime on the seventh day, according to Ackemann. Metro is proposing to set overtime pay at time and a half for the seventh day for safety reasons, she said.

AGREEMENT » PAGE 5

Agreement

FROM PAGE 3

A tentative agreement with SEIU hasn’t been reached yet, but it’s not unusual for negotiations to go on for several months, Ackemann said. A new contract doesn’t have a set date that it has to be in place by, but sooner is better, she said.

The unions will determine the best course of action for them, Ackemann said. Their options are voting to hold a strike, discuss-

ing the agreement over with members and/or coming back with an alternative.

Similar to actions against labor negotiations earlier this month, fixed route bus operators refused overtime Saturday and Sunday, causing service disruptions.

“We rely heavily on overtime in order to fully staff our bus runs,” Ackemann said.

Metro has to prioritize routes with the most riders when this happens, Ackemann said. In an attempt to minimize disruptions, Metro will cancel routes

with fewer riders or end a route early.

Ackemann said bus riders should plan for service disruptions by signing up for alerts or calling customer service.

Contact reporter Elaine Ingalls at 831-706-3253.

SC Police investigate 3 shootings in less than a week

STAFF REPORT

SANTA CRUZ — The Santa Cruz Police Department is looking into three separate shooting incidents that occurred between July 31 and Tuesday night.

Around 9:30 p.m. Tuesday police received multiple calls of shots fired on the 200 block of Grant Street near Grant Park and Berry Street. They found several shell casings but no suspects. No injuries were reported, Sgt. Gregg Crofts, SCPD Investigations.

On Saturday an adult male victim suffering from a single gunshot wound arrived at the hospital with non-life threatening injuries. He was reportedly shot on the 700 block of Chestnut Street just after midnight.

Investigators believe an exchange of gunfire occurred between two people or groups.

Santa Cruz Police detectives were brought in to assist with this investigation and continue to follow up on leads.

No arrests have been made.

Santa Cruz Police investigators ask that anyone who has a home or business surveillance system within the area check their footage, to see if they captured anything that could help.

The incident occurred three days after police responded to a separate shooting in a parking lot near the Santa Cruz Metro Center on the 900 block of Pacific Avenue at about 4 p.m. on July 31, SCPD said.

Investigators found a handgun near the scene. Both the suspect shooter and the victim fled the scene. An unoccupied parked vehicle was struck multiple times, and multiple shell casings were found nearby.

Nobody was injured.

All three of the shootings are being investigated.

Anyone with information about either incident is asked to call 420-5820. Anonymous tipsters can call 420-5995.

TRANSPORTATION

Metro bus service disrupted due to drivers refusing overtime, again

By Elaine Ingalls

eingalls@santacruzsentinel.com

@sentinel_elaine on Twitter

SANTA CRUZ » The Santa Cruz Metro Transit District experienced bus service disruptions Monday, due to fixed-route drivers not accepting overtime. This refusal of overtime is a result of labor negotiations with the bus operators' labor union Smart Local 23.

After mediation with Metro on Friday, "we felt it was necessary," said James Sandoval, general chairperson for Local 23.

"We have been working hard for the past three months at the negotiating table trying to reach an agreement," Sandoval said. "Our operators are continuing to work hard to provide the best service to the public. We want to thank you for your support and understanding

with our struggle in negotiations."

These service disruptions are similar to those that occurred about a month ago when drivers weren't accepting overtime, said Jayme Ackemann, Metro's director of marketing, communications and customer service.

Ackemann said the disruptions are widespread across the county, but Metro is focusing on making sure there are drivers for routes to and from Highway 17, UC Santa Cruz and Cabrillo College because those are the most popular.

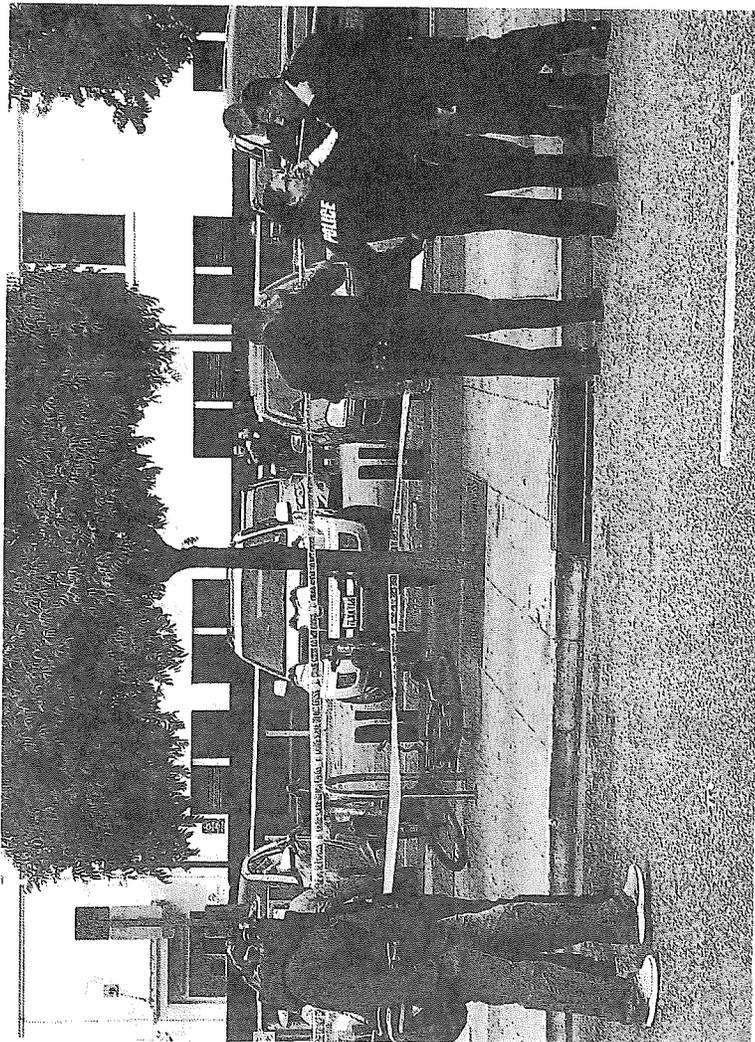
"We are hopeful it will resolve itself quickly," Ackemann said.

Smart Local 23 was still in mediation Monday afternoon with Santa Cruz Metro.

Contact reporter Elaine Ingalls at 831-706-3253.

RECORD

get in touch: www.register-pajaronian.com | newsroom@register-pajaronian.com | 831-761-7300



Shots fired near SC METRO Center

THE PAJARONIAN STAFF REPORTY

SANTA CRUZ — Santa Cruz Police on Wednesday responded to a call that somebody fired several shots during a dispute in the downtown area, police spokeswoman Joyce Blaschke said.

Nobody was injured, and no suspects were located.

According to Blaschke, police got calls about several shots being fired in a parking lot adjacent to the Santa Cruz METRO Center on the

900 block of Pacific Avenue around 4 p.m.

Police recovered a handgun near the scene, Blaschke said.

Both the suspect shooter and the victim fled the scene. Several bullets struck an unoccupied parked vehicle. Investigators found multiple shell casings were nearby.

Anyone with information is asked to contact investigators at 420-5820.

Santa Cruz Police work a crime scene Wednesday next to the Santa Cruz METRO Center where several shots were fired from a gun but no one was hurt.

Contributed

Santa Cruz Sentinel

Thursday, August 1, 2019

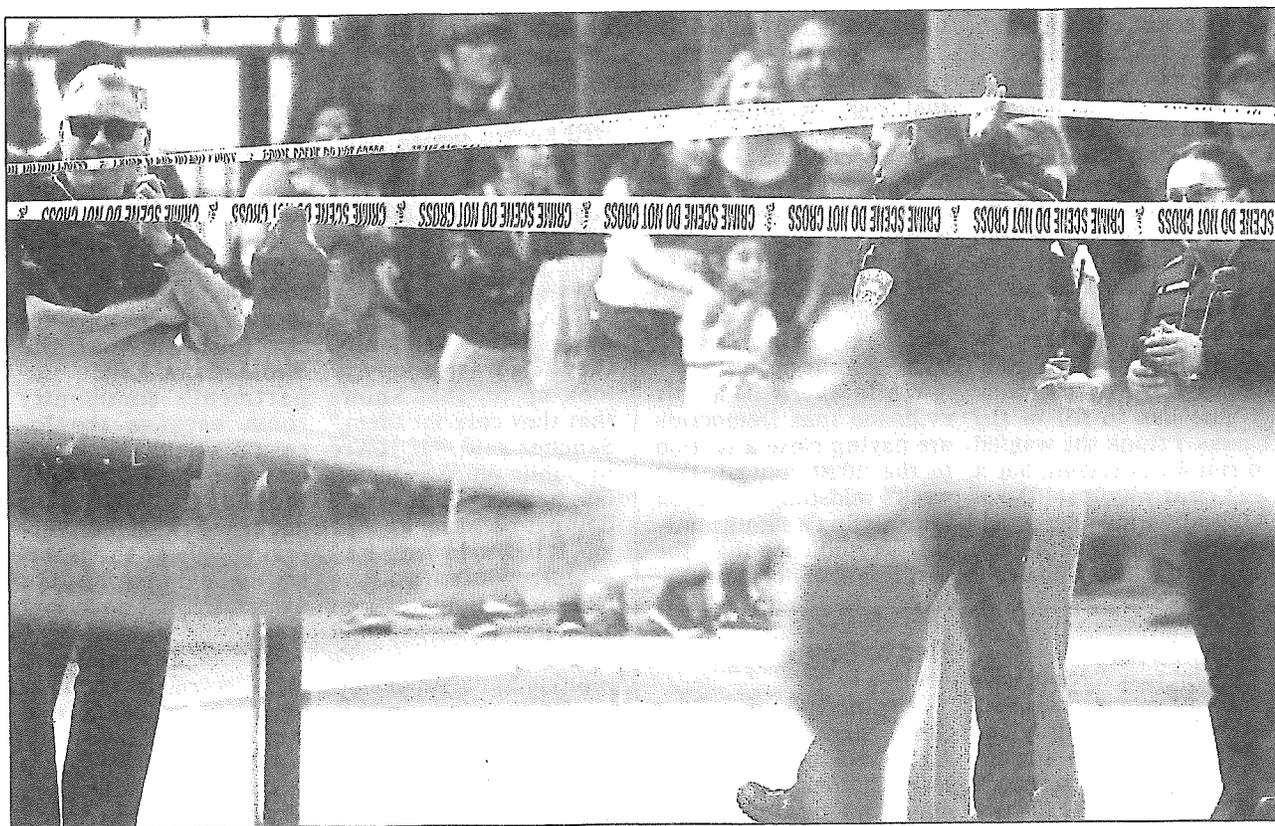
\$1.50 FACEBOOK.COM/SCSENTINEL TWITTER.COM/SCSENTINEL

santacruz

CRIME

POLICE INVESTIGATE SHOOTING

No injuries reported as suspect, victim believed to have fled



SHMUEL THALER — SANTA CRUZ SENTINEL

Crime scene tape crisscrosses a parking lot next to the Santa Cruz METRO Center on Wednesday as police investigate a shooting in downtown Santa Cruz.

By Nicholas Ibarra
nibarra@santacruzsentinel.com

SANTA CRUZ » Gunshots rang out Wednesday afternoon in downtown Santa Cruz in what police believed to be a confrontation between two individuals.

The shooting took place

about 4 p.m. in a parking lot on the 900 block of Pacific Avenue, adjacent to the Santa Cruz METRO Center, according to Santa Cruz Police spokeswoman Joyce Blaschke.

No injuries were immediately reported.

Police said multiple bullets struck a parked car and a bullet may have

struck a nearby building.

"This is not an active shooter," Blaschke said, explaining that police believe the shooting resulted from a confrontation between two individuals, both of whom fled the scene.

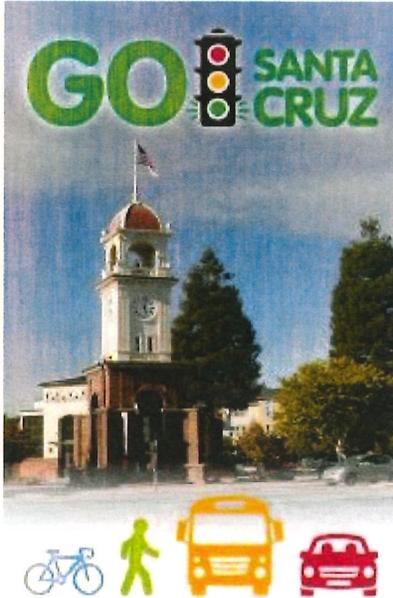
"Right now detectives are following up on reviewing video footage from surrounding businesses to get

a better description of both the suspect and the victim," she added.

A handgun was recovered from the scene, according to Blaschke.

Police attempted to use a K-9 officer to track the individuals believed to have fled the scene, but were not immediately successful.

Cruz 511 Newsletter – July 2019



Go Santa Cruz Bus Pass Program

Do you work in Downtown Santa Cruz? If so, the City of Santa Cruz wants to make your commute easier and more affordable! As of Oct. 1, 2019, the City of Santa Cruz will offer free bus passes for all local routes to any employee located in the Downtown Parking District. These transit passes are good for unlimited rides on Santa Cruz METRO local routes but exclude the Highway 17 Express. This program is part of the City's Go Santa Cruz initiative to promote the many transportation options within the City of Santa Cruz and encourages residents to try biking, walking, carpooling and transit for their daily trips. The Go Santa Cruz program furthers the City's goals to improve mobility while reducing greenhouse gas emissions.

For more information, visit www.cityofsantacruz.com/gosantacruz or email Claire Fliesler at cfliesler@cityofsantacruz.com.

Watsonville releases draft of plan to end serious traffic injuries, deaths

By Nicholas Ibarra
nibarra@santacruzsentinel.com
@nickmibarra on Twitter

WATSONVILLE » Last year, Watsonville embraced an ambitious goal: Putting an end to all traffic fatalities and serious injuries by 2030 in a city that has ranked among the most dangerous for pedestrians in the state.

The city became the first jurisdiction in Santa Cruz County to sign on to the international Vision Zero traffic safety initiative in January 2018. Watsonville is now releasing a draft plan detailing how it intends to make that vision a reality.

"This is going to take a long time, and we're not going to get the change we're looking for overnight," said Watsonville Mayor Francisco Es-

TRAFFIC » PAGE 2

Traffic

FROM PAGE 1

trada. "But hopefully, this will be something that will start today and continue tomorrow — and future councils will hopefully continue it until we get to zero."

The draft Vision Zero Action Plan, reviewed Tuesday by the Watsonville City Council, lists 37 action items to make its roadways safer, using a multi-pronged approach called the "six E's": encouragement, education, enforcement, evaluation, engineering and equity.

Along with stepping up public education, enforcement at accident-prone intersections, and engineering safer roadways and pedestrian crossings, the plan calls for lobbying politicians in Sacramento to give Watsonville more leeway to lower speed limits, install speed cameras and increase penalties for distracted driving.

"It's becoming an epidemic, all these injuries and deaths," said Murray Fontes, Watsonville's principal engineer. "For a community to address it, they need to use all the resources they have."

The city is also partner-

ing with neighboring jurisdictions to launch a regional media campaign to enlist the public's help in taking more responsibility for traffic.

"The community needs to embrace the mindset that injuries and deaths from collisions are unacceptable," Fontes said. "So one of the keys is an education program, and I'm excited that Watsonville is partnering with other cities, and Santa Cruz County, to create a media campaign and put out messages in print, online, radio and television."

Some components of the plan are already underway. Earlier this year, after a rash of bicycle and pedestrian injuries and fatalities, Watsonville moved quickly to put a plan in place to step up traffic enforcement and education.

Watsonville police have since handed out 250 bicycle helmets to youth, and some dangerous intersections now have flags that can be carried by pedestrians to increase their visibility as they use crosswalks.

Watsonville police have made traffic enforcement a top priority, according to Capt. Mike McKinley, who oversees the department's traffic division.

"We have officers that

were hand-picked that were experienced in traffic enforcement working Main Street, Freedom Boulevard and Airport Boulevard," McKinley said, addressing the City Council on Tuesday.

Five people were killed in Watsonville traffic accidents in 2018, and more than a thousand people have been injured on the city's roads since 2011.

In 2014, Watsonville ranked as the most dangerous for pedestrians under the age of 15 out of 105 similarly sized California cities, according to a Community Traffic Safety Coalition report — and the fourth most dangerous for pedestrians overall.

Watsonville's draft Vision Zero Action Plan was developed in collaboration with a Vision Zero Task Force, which includes representatives from Caltrans, the Santa Cruz Regional Transportation Commission, the county Health Services Agency, and the Pajaro Valley Unified School District.

The plan expected to be posted online within the next week at cityofwatsonville.org. Members of the public are invited to comment through Sept. 1, and it is expected to return to the City Council for adoption in October.

Santa Cruz Sentinel

santacruz

Monday, July 8, 2019

\$1.50

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TWITTER.COM/SCSENTINEL

SANTA CRUZ

State bill would free up \$16M for housing

AB 411 has earned bipartisan support

By Jessica A. York

jjork@santacruzsentinel.com

@reporterjess on Twitter

SANTA CRUZ » State legislation that could put some \$16.1 million behind city affordable housing and homeless facility development projects has received little opposition as it sailed through the Assembly and several Senate subcommittees.

Introduced in February by Assemblyman Mark Stone, D-Scotts Valley, Assembly Bill 411 would allow Santa Cruz to spend housing bonds the city had secured prior to statewide dissolution of redevelopment agencies in 2012. The bill passed through the Assembly with a unanimous vote at the end of May.

"In our desire to get affordable housing built, what this bill would do is simply allow City of Santa Cruz to use those bond proceeds instead of sitting in the Successor Agency and then using those proceeds to pay off indebtedness — to put them to work immediately," Stone told the Senate Governance and Finance Committee during a hearing last month.

Even after completing its obligations and paying off the debt service for a \$35 million bond, the city expects to have another \$16 million remaining in 2021, city Economic Development Director Bonnie Lipscomb testified at the June 12 committee hearing in Sacramento. Downtown affordable housing projects awaiting city financial assistance include a workforce housing project with Santa Cruz City Schools, a 100- to 150-unit housing project partnering with Santa Cruz Metro transit center efforts and a low-cost community dental and health-care effort serving disadvantaged

Housing

FROM PAGE 1

youth and families through the Santa Cruz Community Health Center, she said.

"What we hope from AB 411 is that the funding released by approval of this legislation will allow us to move forward on these projects," Lipscomb said. "Through these projects, we'll be able to meet our regional housing needs allocation and continue providing affordable housing in our community."

Prior to their dissolution, redevelopment agencies permitted California jurisdictions to use a portion of yearly local property tax revenues to pay for eco-

omic development projects — including housing — in blighted areas. Generally, the redevelopment agencies issued project bonds backed by the tax revenue that emerged when property values improved within the project area, thereby generating higher tax revenues.

After state legislation forced the closing down or "unwinding" of redevelopment agencies, communities such as Santa Cruz lost a tool for offering developer incentives to build low-cost housing, in particular. Now, said Lipscomb, Santa Cruz has been cited as one of the least affordable housing markets in the nation.

California Teachers Association legislative advocate Jennifer Baker raised

concerns about the Santa Cruz-centric bill. When redevelopment agencies dissolved, property tax revenue that had previously been funneled to those agencies was spread among neighboring local governments and special districts. School districts, in particular, often have been major beneficiaries of the additional revenue. Under a process outlined by AB 411, the state's general fund would backfill lost property tax to other agencies. Baker said she feared that if another recession were to hit the state, general fund coffers would not be able to bolster the lost revenue and the local school districts would be "at a competitive disadvantage, because the property tax revenues that

they would receive are the most stable source of revenue in a down economic time."

"While the intent would be to try to provide support for teachers to get affordable housing, if at the end of the day that means the schools don't have all the property tax revenue they would have had otherwise, they might not even be able to to keep all the teachers that they're providing affordable housing for," said Baker, adding that the association is not opposed to affordable housing development efforts.

AB 411 is set to head next to the Senate Committee on Appropriations.

Contact reporter Jessica A. York at 831-706-3264.

Scotts Valley Times

Fiscal Transparency

By: Bruce McPherson

July 8, 2019



Starting July 1, Santa Cruz County will enter a new fiscal year with a heightened sense of sophistication and transparency about our work on behalf of the public, and I'd like you to know how District 5 will benefit from our comprehensive planning initiatives.

The County produced its inaugural two-year budget this year, with the Board of Supervisors approving the 2019-2020 budget cycle on June 25.

On the same day, the Board approved a two-year Operational Plan designed to chart our course for achieving 178 objectives informed by our Strategic Plan passed a year ago. Taken together, the budget and these plans paint a detailed picture of our future work.

In addition to all the public safety, health, parks, public works and other basic services, the budget contains numerous items meant to address emerging needs and opportunities.

Most significantly, the County approved a plan to fund \$7.2 million in reimbursements and repairs on storm-damaged roads by borrowing from two pots in County reserves to be repaid through future revenues, including from the state gas tax and franchise fees.

District 5 sites targeted for repair with this funding include two spots on East Zayante Road as well as locations on Lompico Road and Glenwood Drive. We needed to create our own funding source for these fixes partly because the Federal Highway Administration, the federal agency that would ordinarily reimburse the County, recently changed its policy to require more stringent deadlines for completing such repairs.

Lawmakers in Washington are working to re-establish greater leniency – which is especially needed in a highly regulated environmental climate like California – that would restore funding for \$35 million in additional repairs that we cannot afford to pay for locally.

Just to give you a sense of how critical this is, the \$35 million represents half of the overall storm damage to Federal Aide routes in the whole state of California.

Also, in the budget is additional funding for two important projects in the San Lorenzo Valley: The construction of the Nature Discovery Park adjacent to the new Felton Library currently under construction, as well as renovations to the Boulder Creek Library planned for 2020.

Despite \$1 million in state funding secured by Assemblymember Mark Stone, as well as nearly \$800,000 combined from Measure G and a State Parks grant, there remained a \$266,000 gap between the base construction bid and the budget.

I'm grateful to the Felton Library Friends and our Parks Department for working together to reduce costs and direct donor contributions to fill the shortfall so we could award the contract.

In Boulder Creek, we have the exciting opportunity to match up to \$100,000 from a Monterey Peninsula Foundation grant for renovations to the library. The County has dedicated an additional \$30,000 toward this effort.

The budget also includes a \$1.6 million investment in a new countywide voting system that is more intuitive for voters and will make their intent more easily verifiable by the County Clerk. Residents will also benefit from an additional \$20,000 for the Santa Cruz County Fire Safe Council, which provides coordination, education and projects related to fire prevention.

Now that we have completed the budget, the Board of Supervisors is in recess throughout the month of July. But that doesn't mean our work on your behalf stops.

We will continue to partner with the Regional Transportation Commission this summer on implementation of the Highway 9 Corridor Plan, which is set to be approved by the Commission on June 27. We are also awaiting the details of a state-funded plan to secure a site in the City of Santa Cruz for a future navigation center designed to identify the most effective services and other resources for people experiencing homelessness.

Lastly, I hope to see you in Boulder Creek at the July 4th Parade and I encourage you to mark your calendars for the August 6 National Night Out block parties and other events in your community.



LOCAL NEWS

Tuesday, July 2, 2019 » MORE AT [FACEBOOK.COM/SCSENTINEL](https://www.facebook.com/scsentinel) AND [TWITTER.COM/SCSENTINEL](https://twitter.com/scsentinel)

BUS SERVICE

Labor debates affect METRO bus routes

Fixed route bus operators refused to take overtime Friday through Sunday

By Elaine Ingalls

eingalls@santacruzsentinel.com
[@sentinel_elaine](https://twitter.com/sentinel_elaine) on Twitter

SANTA CRUZ » Santa Cruz METRO riders were impacted over the weekend by bus operators who refused to accept overtime due to contract negotiations, resulting in delayed buses and eliminated services on some routes.

Santa Cruz METRO is in the middle of labor negotiations with three unions of its employees. The lead negotiators of the bus union Sheet Metal Air Rail and Transportation Local 23, or SMART Local 23, encouraged fixed-route operators not to accept overtime starting Friday, according to a letter METRO released to its customers Saturday. METRO ParaCruz operators also belong to SMART Local 23, but did not refuse overtime. Other METRO employees who do administrative work belong to the Service Employees International Union. SEIU did not participate in the job action, but did participate in a rally Tuesday during their lunch breaks at the METRO Administrative Offices, 110 Vernon St.

James Sandoval, general chairperson of SMART Local 23, said union members' wages have been frozen for four years to help the agency recover its operating costs.

"We are tired of being put on the back burners when it comes to compensation and watching all of management get their substantial wage increases," he said. "We are devoted to providing public transportation to our community, which is why we do not want METRO to limit the flexibility or covering service," he said. "We work seven days a week, 15 hours a day to minimize service disruption."

Jayne Ackemann, METRO's director of marketing, communications and customer service said the wage freeze was voluntary and voted for by the union members.

Specific service routes weren't impacted, but a variety were because bus operators cover multiple routes on their shifts, Ackemann said. In a typical eight hour shift, fixed route bus operators can cover five runs, which could be the same route or a mix across the county.

From Friday to Sunday, bus service routes delayed riders. METRO saw a 20% increase in

BUS » PAGE 5

Bus

FROM PAGE 3

call volumes to customer service, Ackemann said.

Santa Cruz resident Daniel Quiane took the 71 bus from the Santa Cruz METRO Center, 920 Pacific Ave., to Watsonville around 1 p.m. Sunday. He said security told him there was going to be a strike and his bus wouldn't be coming, but it ended up arriving 10-20 minutes later than normal.

"It confused me a little bit," he said.

Also on Sunday, Ellie Cholico took the 35A bus

at about 2:30 p.m. from the METRO Center to Scotts Valley for her shift at Carl's Jr. She said it's usually right on time, but she had to wait about 5-10 minutes. She didn't know about the service disruption.

After conversations with METRO's Board of Directors about getting a contract done, the fixed-route bus operators started accepting overtime again at 3 p.m. Sunday, according to Sandoval.

"We care about the public," he said. "We never want the public to get in the middle of what we're doing," adding that the union will hold off on any other job action until the

next labor negotiation meeting on July 8.

Ackemann said there is no way to predict when labor negotiations will be done. She said METRO's labor union contracts expired Sunday, but METRO is at the negotiating table. Contracts typically last three years. The last labor negotiation was in 2012 and that contract has since been extended since 2015, when METRO was recovering from the recession.

Bus riders can subscribe to service alerts at scmtd.com or contact Customer Service at 831-425-8600 or customerservice@scmtd.com.

Santa Cruz Sentinel - July 2, 2019

Labor negotiations affect Santa Cruz METRO bus routes

Fixed route bus operators refused to take overtime Friday through Sunday, now accepting overtime again



Santa Cruz METRO fixed-route bus operators, ParaCruz operators and other union members rallied outside of Santa Cruz City Hall Friday during a Board of Directors meeting to show their frustrations with labor negotiations. (Contributed: James Sandoval)

By [Elaine Ingalls](mailto:eingalls@santacruzsentinel.com) | eingalls@santacruzsentinel.com | Santa Cruz Sentinel
PUBLISHED: July 1, 2019 at 5:28 pm | UPDATED: July 1, 2019 at 5:30 pm

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ONLINE CHATTER

Regarding the City's mural project

Absolutely horrendous. Was this designed by a graffiti artist or a muralist? Watsonville enablers, be ashamed of yourselves. Many big buckets of brown paint are indicated — much like freeway sound walls.

Martin Nordvick
From R-P website

Love this! Grateful for the value of art and these murals look amazing. Thanks to local leaders and artists for making this happen. Look forward to seeing it completed.

Bobby
From R-P website

1.5 million on art work for the city what a waste of money. I'm sure there's a lot better things we can do with that kind of money!

James Gomez
From Facebook

The most important aspect of this mural project is to have all ethnic groups from the area both past and present represented. It's called inclusion. Everyone feels included that way there's no animosity — we're all represented in one place. What do you all think of this?

Phil Jennings
From Facebook

Regarding City's budget hearings

They will never discuss cutting salaries and benefits because they believe they are the chosen ones and they can just tax you until you leave. Cities talking about generating more revenue should be illegal, they are there to live within their means, and to base salaries and benefits like a company, of which they never will because they are all in on it together, from the janitor to the mayor. Greed is alive and well and there will be an end destination and it will be very ugly.

Steve Farmer
From R-P website

Other Transit Related Articles

San Francisco Chronicle

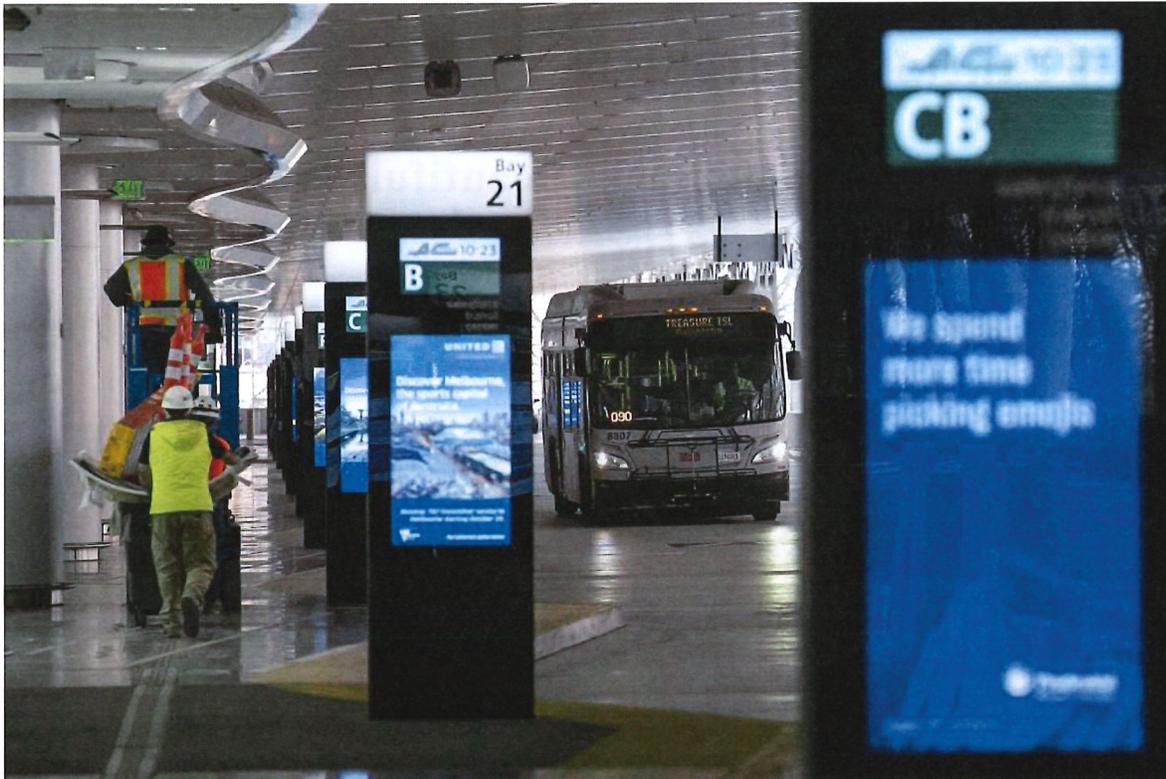
SF Commuters Welcome Back 'Beautiful' Transbay Transit Center

By: Michael Cabanatuan

Aug. 12, 2019



A commuter leaves an Alameda-Contra Costa Transit bus after it pulled into the Salesforce Transit Center on the first day AC Transit service returns to the reopened Salesforce Transit Center Sunday, Aug. 11, 2019, in San Francisco, Calif. Photo: Josie Norris / The Chronicle



An Alameda-Contra Costa Transit (AC Transit) bus pulls into the reopened Salesforce Transit Center on the first day service returns to the reopened transit center Sunday, Aug. 11, 2019, in San Francisco, Calif. Photo: Josie Norris / The Chronicle

Supervisors wielding orange wands Monday morning waved buses into San Francisco's Transbay transit center in the first weekday commute in more than 10 months, while a "bus fountain" on the rooftop park spurted jets of water into the air as if in long-anticipated celebration.

The return of weekday commuters to the recently reopened Transbay transit center got off to a smooth start as AC Transit and WestCAT Lynx buses from the East Bay pulled into the spacious, clean bus deck on the center's third floor and dropped off passengers, including some who hadn't previously entered the center.

"I actually didn't know it had opened until I woke up from my nap," said Rachel DeLeon, 37, of Hercules. "It looks really nice — it's beautiful."

Others had taken buses into the center during its six-week debut, but they were glad to be back.

"It's better than the temporary terminal, because it's enclosed and the buses can get in and out a lot smoother and faster on the ramp off the

bridge,” said Mike McTigh, a software developer who commutes from Los Altos to Emeryville via bike, Caltrain and AC Transit’s F bus.

Some riders on Monday were wary about the safety of the transit center, even after 10 months of repairs and inspections.

“It’s beautiful and very functional,” said Rose Robinson, 64, of Oakland after climbing off AC Transit’s NX-2 bus. “But when I heard about the crack, I thought maybe they opened (the first time) a little bit early.

“I’m hoping it’s all resolved and is a safe place because it’s great.”

Robert Lyles, an AC Transit spokesman, said the morning commute went just as hoped Monday.

“All the buses were coming in on time,” he said, “I think a lot of people are enjoying coming back here.”

The main questions riders had, he said, were about how to get down to street level and where to catch Muni and Golden Gate transit buses or BART. AC Transit ambassadors, who were wearing neon-green vests, barked out directions: “This way to the escalators!”

More than 14,000 riders a day take the AC Transit buses that will go into and out of the center. AC Transit will run 26 transbay lines in addition to four early-bird express buses it is operating for BART. WestCAT Lynx and Muni’s 25-Treasure Island bus will also use the transit center’s bus deck.

Lyles said one of the biggest attractions of the transit center is the reduced travel time because of the buses-only ramp off the Bay Bridge into the terminal. Using the ramp cuts off an average of five to 10 minutes compared to traveling down city streets to the Temporary Transbay Terminal a block away, he said. Passengers disembarking at the new transit center reported trips about six to seven minutes quicker Monday morning.

Greyhound is expected to make the move in a few weeks and negotiations with Amtrak, which runs buses that connect with trains in Emeryville, are progressing, officials said. Several Muni and Golden Gate Transit buses are already stopping in a plaza just outside the center.

Most of the passengers climbing off of transbay buses headed down escalators into the center’s Grand Hall and Fremont or Mission streets, but

some headed up a floor to the rooftop park. They were greeted by the linear “bus fountain,” which sends streams of water skyward whenever a bus passes below.

While the park is an obvious draw, the transit center will soon have more attractions. It will eventually house businesses that include restaurants, coffee shops and even medical services. For now, food trucks operate outside the terminal and carts serve food in the rooftop park.

Salesforce has naming rights to the center and runs a cable-supported gondola from the plaza outside Salesforce Tower to the park.

INDUSTRY NEWS

City of Sacramento Approves Free Transit Pass Program for All Students



K-12 students in Sacramento will be able to ride SacRT buses and light rail for free beginning in October.

Beginning in October, all students in grades K through 12 who live in or go to school in the City of Sacramento will be able to get a free pass on all **Sacramento Regional Transit District** (SacRT) buses and light rail. The program will last for a year, during which time it will be evaluated and potentially renewed.

The City of Sacramento will provide \$1 million from its general fund to offset any potential revenue losses to SacRT. The general fund is supported in part by Measure U, a one-cent sales tax that has been approved and extended by city residents. The city invests some of that funding in an equity investment fund, for safety, housing and youth services and programming.

“It will make a big difference in the lives of young people and their communities,” said Sacramento City Councilmember Jay Schenirer, who championed the program. “This is an important investment in our neighborhoods, in our young people, and in our economy.”

Attendance problems and chronic absenteeism, he said, is frequently due to difficulties getting to school. Reducing those issues could help increase funding to schools from the state, since it is based on Average Daily Attendance. “It’s a win for SacRT, for the schools, for economic development – it’s absolutely good for young people to be able to get where they’re going,” said Schenirer. “And it’s good for the climate too. We could make a significant dent in vehicle miles traveled if we can reduce the number of school trips.”

AC Transit Service Soon Returns to Salesforce Transit Center

The **Alameda-Contra Costa Transit District** (AC Transit), following months-long appraisals and review, recently announced the restoration of Transbay Bus Line service to the Salesforce Transit Center beginning Sunday, August 11.

Bus Operator training pacing ahead of forecasted schedules, and the Transbay Joint Powers Authority (TJPA) construction crews making advancements in the reinstallation of bus deck interior finishes – columns, posts, floors, walls, and ceiling treatments – has accelerated AC Transit’s return date.

“Following last year’s discovery of fissures in the steel beams supporting the bus deck, the AC Transit Board of Directors demanded assurances that repairs of the beams would be unequivocally safe and sound,” said AC Transit Board President Joe Wallace. “The findings presented to our board provided robust certainties that support restoring service to our 13,000 daily Transbay riders.”

In addition to the nationally recognized five-member Peer Review Committee, empaneled by the **Metropolitan Transportation Commission** (MTC), AC Transit performed its internal review of the steel beam remediation.

“Our engineering staff members observed installation, monitored physical inspections, reviewed girder fabrication, design stresses and inspection reports of the girders at Fremont and First Streets,” said Michael Hursh, General Manager. “This comprehensive analysis was the foundation I needed to assure that our bus operators, service employees, mechanics, and road supervisors are indeed safely working in a world-class transit center.”

Transbay lines will once again bypass congested San Francisco surface streets by traveling the dedicated bus ramp. Twenty-seven bus bays, dedicated exclusively to AC Transit, will better accommodate the popularity of Transbay Bus Lines and double-deck coaches. Recommissioning the transit center also restores the first of its kind Bus Storage Facility (BSF). The BSF is located adjacent to the Salesforce Transit Center and helps the District to reduce fuel consumption, maintenance costs, and greenhouse gases.

The Mobile App Foothill Transit Watch Launches

Foothill Transit launched Foothill Transit Watch this month, a mobile application that allows customers to communicate suspicious activity and safety concerns discretely and in real time.

Foothill Transit partnered with **ELERTS Corporation** to develop Foothill Transit Watch to make real-time communication of safety and security tips possible. In addition to the mobile application, Foothill Transit and ELERTS developed a text tip hotline where customers can send tips via text message.

“Safety is Foothill Transit’s number one priority,” said Doran Barnes, Executive Director of Foothill Transit. “This advanced tool for enhancing customer safety, while protecting and simplifying the communication of crucial information is a smart new addition to our agency-wide safety initiatives.”

Customers can report tips with pictures and videos, providing a first-person account of on board incidents or suspicious activity. Tips may be submitted with customer location and contact information, or anonymously. While reports will be monitored 24-7, the app is not intended as a replacement for calling 911 in emergencies. Features include:

- Under 20-second Incident Reporting – the app is designed to enable riders to submit reports quickly.
- Discreet Incident Reporting – to ensure discretion and safety for riders, the camera flash is automatically disabled when photos are taken through the app.
- Two-way communication – Foothill Police dispatchers may ask questions or provide instructions to the rider.
- BOLO Alerts – Foothill Police may broadcast BOLO’s (Be On the Look Out) to ask riders to look for specific persons of interest such as criminal suspects or missing persons.
- Foothill Transit Watch is now available for download on Google Play or the App Store.

“ELERTS is proud to help Foothill embrace crowd sourcing for increased safety and security. We’ve seen time and again the value it brings to public transit, and we are committed to making it easy for Foothill Transit customers to alert the transit dispatchers when a situation is occurring,” said Ed English, CEO of ELERTS. “Our See Say solution improves safety for riders and bus operators.”

MST Replaces Iconic Monterey Trolleys with New Ones

Monterey-Salinas Transit (MST) released into service five new trolley-style buses manufactured by Hometown Trolley of Crandon, Wisconsin, after the previous 16-year old trolleys reached the end of their useful life.

“First introduced in 2004, the original Monterey trolleys were designed to have a vintage look and, by 2018, were attracting over 250,000 passengers annually,” said General Manager and CEO Carl Sedoryk. “People really get to experience the area by riding the free trolley with views of beautiful Monterey Bay and the harbor.”

The new trolleys transport passengers through the downtown historic areas of Monterey – California’s first capitol city – and popular visitor locations such as Fisherman’s Wharf, Cannery Row, and the world famous Monterey Bay Aquarium.

CA: Targeting Bay Area Gridlock, Groups Floating \$100 Billion Tax Measure

From BART trains packed to capacity during the commute to freeways that jam well before dawn, the strain on the Bay Area's transportation backbone is intensifying.

By: Rachel Swan

July 22, 2019

From BART trains packed to capacity during the commute to freeways that jam well before dawn, the strain on the Bay Area's transportation backbone is intensifying.

And with the region's population expected to swell from 7.75 million to nearly 10 million by 2040, big engineering fantasies like a second trans-bay rail crossing and a stretch of Caltrain tracks through downtown San Francisco have become urgent needs. But the projects won't come cheap: The Bay Area needs hundreds of billions of dollars to build them.

"This isn't a problem that's going to wait for us -- we really need to run at it," said Jim Wunderman, president and chief executive of the Bay Area Council, an advocacy group for major employers like Google and Kaiser Permanente.

Sensing an opportunity to harness frustration, he and other business leaders recently collaborated with transportation agencies and nonprofits to develop a ballot measure for November 2020 dubbed Faster Bay Area. It aims to generate at least \$100 billion in 40 years.

Though in its early stages, the measure would likely be a penny sales tax to fund a wish list of infrastructure projects. Among them: the downtown extension of Caltrain into the Transbay Transit Center, a project that has long intrigued and eluded political leaders in San Francisco and San Mateo counties.

Faster Bay Area would first require state legislation to grant taxing authority to a regional agency. This initial bill would have to pass early next year so that Faster Bay Area could place the initiative on the November 2020 ballot.

The timeline is aggressive, in part due to pressure to compete with Los Angeles, which enacted a similar sales tax. Mayor Eric Garcetti hopes to complete 28 transportation infrastructure projects by 2028, the year the city hosts the summer Olympics. That goal, propelled by sales-tax revenue, puts Los Angeles in a strong position to obtain federal grants. The Bay Area would vie for the same pot of money.

While Bay Area voters don't have the singular focus of a sporting event, they're still hungry for efficient mass transit and traffic relief. Last year's Regional Measure 3 bridge-toll increases won with 55% of the vote, showing that people are willing to reach into their wallets for new BART cars and ferryboats and a latticework of freeway express lanes, among other improvements.

Policymakers view Regional Measure 3 as their first stab at a deep, complicated, expensive problem.

"We've seen in focus groups that people identify traffic as one of their top quality-of-life concerns," said Alicia John-Baptiste, president and chief executive of the urban think tank SPUR, which is working on the ballot measure. "They want to see big solutions, not incremental solutions."

Big, audacious ideas tend to draw opposition, and taxpayer advocacy groups that fought Regional Measure 3 are already wary of this one.

"This whole regional approach to transportation funding is problematic to me," said Jack Weir, president of the Contra Costa Taxpayers Association.

Faster Bay Area may also clash with local governments that want to pitch their own sales tax measures for things like road repair, parks and flood control. Voters sometimes get turned off or baffled when staring down at a tax-heavy ballot, which leads people to vote "no" on everything. Some supporters of Contra Costa's ill-fated Measure X -- a 2016 sales tax that would have fixed potholes and paid for other local transportation improvements -- say it went down because of competition from BART's regional Measure RR.

Commuters standing at the bus stop outside El Cerrito Del Norte BART Station on Thursday night said they might vote to approve a new sales tax, so long as they see the benefits. Some wanted BART to extend to Hercules and Vallejo. Others just want the Bay Area's hodge-podge transit systems to better align with one another, so they don't have to walk a distance or wait 15 minutes to make a transfer.

"Just make the schedules more compatible," said Michelle Square, a nurse at Kaiser's Richmond Medical Center who commutes from her home in Suisun City. She stood waiting for the Green Express bus, alongside other riders who trek from Solano County -- where real estate is cheaper -- to work in the inner Bay Area.

Among them was Cathy Jensen, an interior designer from Vallejo. She said she does not have a working car and relies on buses to travel throughout the Bay Area, often with two suitcases full of samples.

On Thursday, Jensen took three buses to get to a client's house in Novato - about 20 miles from her home -- a journey that took 2 1/2 hours. At 6 p.m., she braced for the same long trip back home.

Demand for synchronized schedules and a better bus network has grown as long-distance commutes become the new normal. At the same time, early-morning traffic is getting heavier on Bay Area freeways.

Data from the Metropolitan Transportation Commission shows a dramatic increase in vehicles crossing the Bay Bridge between 3 and 4 a.m. -- from 1,500 a day during the third week of May 2015 to 2,256 a day in the same week this year.

Traffic over the Altamont Pass between Tracy and Livermore has grown by 43% in seven years, owing to people driving into the Bay Area from the more affordable Central Valley, said Stuart Cohen, a transportation policy expert who is helping steer the Faster Bay Area campaign.

Revenue from a new sales tax could provide some relief for these super-commuters. One project in the works is the Valley Link rail, which would run from Lathrop in San Joaquin County to the Dublin/Pleasanton BART Station.

Another solution is to build a better network of freeway express lanes, which allow buses to bypass traffic. Officials could add additional tracks to railways like the Capitol Corridor. The system's passenger trains, which run from San Jose to Placer County, currently share tracks with freight cars, which limits service.

While the ballot measure is driven largely by companies trying to get their employees to work, it will also have ramifications for working-class people in the suburbs. That population pays a greater share of its wealth to sales taxes, so the measure might include some form of low-income rebate, said Cohen.

He and John-Baptiste are cognizant of the economic injustice built into the Bay Area's transportation system, in which lower-income people generally have longer, costlier commutes. Faster Bay Area will need their buy-in if it stands a chance of success.

"Honestly, to win passage it's going to need to benefit every county," Cohen said. "We want to act and move as a region."

The Mercury News

Caltrain Has An Ambitious Plan To Run BART-Like Service. Here's What It Will Mean For Bay Area Traffic

But the price tag won't be small

By: [Erin Baldassari](#) | Bay Area News Group

July 22, 2019



As more people crowd the Bay Area, jostling for jobs in Silicon Valley and San Francisco and converging on already-congested freeways, the Peninsula's commuter railroad is looking to grow, transforming a once-sleepy suburban line into a truly urban transit system.

Caltrain's vision contemplates BART-like "show-up and go" service, whisking passengers from San Francisco to Gilroy on trains that run at least every 15 minutes all day long. The agency presented its vision — and accompanying business plan — for the first time publicly in a YouTube

town hall event Monday, with more public meetings rolling out over the next several months before the agency's governing board officially adopts the plan.

It's a huge step for the agency, said Laura Tolkoff, a policy director with SPUR, an urban planning think-tank.

"This business plan is a big deal," Tolkoff said. "It would really move Caltrain from an infrequent, ephemeral, commuter-focused service to an outstanding transit system that serves many different people for many different kinds of trips."

Gone would be the days of passengers organizing their lives around the train's schedule, as Millbrae resident Emily Sontag does every day on her commute to and from work, she said. She often stays late at her Stanford job, not leaving until around 7 p.m., at a time when Caltrain runs only once an hour. If her bus hits too many red lights or gets delayed for any reason, she said, she's stuck waiting at the station.

"And that sucks," Sontag said, adding that more service "would be wonderful."

"It would definitely make my commute way easier and take away the stress of timing those connections," she said. "And it might make it easier to take the train for things like going out to dinner or catching a movie when I would otherwise take Lyft."

Like Sontag, three-quarters of Caltrain's passengers are "choice riders," said Seamus Murphy, a spokesman for the agency, meaning they have the option of driving or taking some other form of transportation. By increasing the number of trains from five to eight during the peak hour and running express Baby Bullet trains every 15 minutes, Caltrain expects to nearly triple the number of riders, from around 65,000 per day today to 180,000.

That's the equivalent of adding five and a half lanes to the freeway without any of the carbon-spewing side effects, Murphy said.

The Peninsula — and the Bay Area as a whole — will need the added people-moving capacity as it continues to grow, said Matt Quevedo, the director of housing, transportation and community engagement for the

Silicon Valley Leadership Group, a business advocacy organization. Over the next 20 years, regional planners estimate the Bay Area's population is expected to increase by more than 40 percent, adding 2.4 million residents and 1.3 million jobs.

"We need this corridor moving to keep our local economy moving," Quevedo said, adding that if the plan is approved, it would help move more people up and down the Peninsula. "Commuters who don't take the train will see less traffic congestion, better air quality and better commute times."

But it won't be cheap. To run more trains and add more passengers, Caltrain anticipates it will need around \$90 million per year in operating subsidies, in addition to state funds and revenue from fares, the latter of which covers about 70 percent of its operating budget.

To help raise those funds, Caltrain has floated the idea of increasing the sales tax in San Francisco, San Mateo and Santa Clara counties by either one-eighth or one-quarter of one cent, generating around \$100 million or \$200 million annually, respectively, for operating costs, capital projects and other needs. If it does decide to ask for the sales tax increase, it would place the measure on the 2020 ballot, said Sebastian Petty, Caltrain's director of policy development.

There's also been talk over the past several years of a \$100 billion or more regional transportation funding measure, that could include a mix of property, sales and business taxes, with the goal of better knitting the region's more than two dozen transit agencies into a cohesive, high performing and high ridership system, and Caltrain may try to seek funding through that measure, Petty said.

If Caltrain is to realize its dream of becoming a truly urban transit system, it will need to do much more than add trains and run them more often, he added; it will need to integrate its service with others planned for the region.

There's a proposal to add train service across the Dumbarton rail corridor, to the Monterey peninsula, and across the San Francisco Bay in a new transbay tube. There's planning underway to extend Caltrain's line in downtown San Francisco from its terminus at 4th and King streets to the Salesforce Transit Center and to build a new world-class train depot at Diridon Station in San Jose.

“We wanted to articulate a complete or end-state vision,” Petty said, “so we could really show what a fully complete system looks like.”

All of those capital projects — not including a second Transbay Tube or other rail services — are estimated to cost around \$25 billion, of which roughly \$6.5 billion would be needed for improvements solely related to increased Caltrain service, such as adding grade separations and passing tracks or lengthening station platforms.

But it won't need to do all of that work before it can start running a few more trains, said Jim Hartnett, Caltrain's general manager. More than \$2 billion in improvements to electrify Caltrain's diesel-powered line and add 19 new electric trains is already underway and expected to be complete by 2022.

The electric trains, which will replace most of Caltrain's current fleet, stop and start more quickly than the diesel trains, speeding up the trip. And the agency will be able to run one more train during the peak commute hour, Murphy said, for a total of six trains in both directions, which the agency expects will encourage around 20 percent more riders to start taking the train. More improvements to service can be added incrementally, Hartnett said.

But while increasing the number of peak hour trains from five to eight is a significant step, some transit advocates say the agency could aim even higher. Caltrain's business plan contemplates a scenario where 16 trains could run during the peak hour, nearly quadrupling the current ridership and sharing the tracks with not only high-speed rail but other train services, such as the Altamont Corridor Express or the new Dumbarton rail, as well.

The region is only going to continue to grow, said Adina Levin, the co-founder of Friends of Caltrain, a transit advocacy organization. So why not aim high, she said, even if the vision isn't ultimately achieved due to factors outside of Caltrain's control, such as the fate of high-speed rail.

“We understand Caltrain staff might be feeling a little cautious and are thinking they should under-promise,” Levin said. “But what we want to see from Caltrain is to say, ‘Our goal is to aim high and we will do what we can to surmount any challenges that come up.’ We think that will set the direction and position people with the right mindset to do just that.”

Asian Countries Could Form Electric OPEC With EV Battery Domination

By: Eric Peters / InsideSources.com

Jul 21, 2019

Most of the world's electric cars are manufactured in the West. But two-thirds of EV battery production happens in the East.

Just one company — China's Contemporary Amperex Technology — accounts for almost a third of world production of lithium-ion battery cells all by itself. All of the top 10 producers are Asian, mostly Chinese and South Korean.

In effect, a battery cartel is developing that's analogous to OPEC — the Organization of Petroleum Exporting Countries. Which is ironic, given that electric car development has been spurred at least in part by the prospect of making Americans less dependent upon potentially unfriendly foreign governments for energy.

But an EV without a battery is like a conventional car with an empty gas tank. It makes for a nice paperweight.

If foreign countries control the lion's share of EV battery production — and Americans start driving EVs in large numbers — the new OPEC will have potentially as much control over American drivers as the old OPEC once did.

But why is the West so dependent on the East for EV batteries?

It's not because that's where the lithium — a key raw material used in the manufacture of lithium-ion batteries — is. In fact, most of the world's naturally occurring supply of lithium is in this hemisphere. About 80 percent comes from three South American countries: Argentina, Bolivia and Chile — the "Saudi Arabia of lithium."

The techniques used to get the lithium aren't particularly toxic, either. For the most part, it involves evaporating it out of brine solution — a process largely fueled by the sun.

But lithium isn't the only raw material that goes into making EV batteries. Cobalt, nickel and graphite are three other very necessary materials — and obtaining these does entail environmentally unfriendly techniques, especially as regards cobalt.

About a fourth of the world's supply comes from open/pit mining in the Congo. All of these raw materials must then be processed into batteries — which happens mostly in Asia because it's cheaper. And it's cheaper because environmental regs in Asian countries — in China, especially — aren't as costly to comply with as in the West.

Which brings us to an interestingly inconvenient truth regarding the environmental-energy nexus. Electric cars are touted in the West as being “cleaner” than conventional/internal combustion-powered cars — and they are, if you only consider the tailpipe. But if you consider the mines — and the processing plants in the East that turn the necessary raw materials into EV batteries — they may be less environmentally friendly in the aggregate.

It takes almost 30 pounds of lithium to make one battery pack for an electric car like the Tesla S. Plus the cobalt, nickel and graphite. And it takes a lot of electricity — provided for the most part by utilities that burn fossil fuels such as coal and oil (as well as natural gas) to power the EV's batteries, which must be recharged more often than an internal combustion car's gas tank needs to be refilled because EV batteries are much less energy dense than gasoline.

This energy density disparity is why even the longest-range EVs go only about half as far on a full charge as a gasoline-fueled car can travel on a full tank.

But that's merely a functional problem. The environmental (and energy dependence) problem remains.

If environmental regs equivalent to those in force in the West are ever applied to the battery manufacturing plants in the East, the cost of EVs — already a big problem in terms of making them economically feasible as mass-market alternatives to non-EVs — will go up. This, in turn will make them even harder to sell than they already are — even with massive subsidies that include a \$7,500 per car federal tax rebate available to the EV buyer.

The regs in the United States could also be relaxed — and that would encourage the manufacture of EV batteries here, which would reduce the power of the emerging EV battery cartel over there. But that would entail allowing American manufacturers to “emit” at least as much as their Asian analogs — obviating the “clean air” argument for EVs.

An increase in nuclear power (generating capacity) would solve or at least greatly reduce some of the problem, in terms of the emissions arising from the production of the electricity EVs “burn” at the smokestack. But increasing nuclear power generation is politically untenable. And even if it weren’t, there’s still the battery emissions problem.

Better there than here seems to be the reasoning. Even if it doesn’t make the Earth any greener in the aggregate. And even if it means creating an electrified OPEC to take the place of the old one.

Eric Peters has been covering transportation and regulatory issues for the past 25 years.

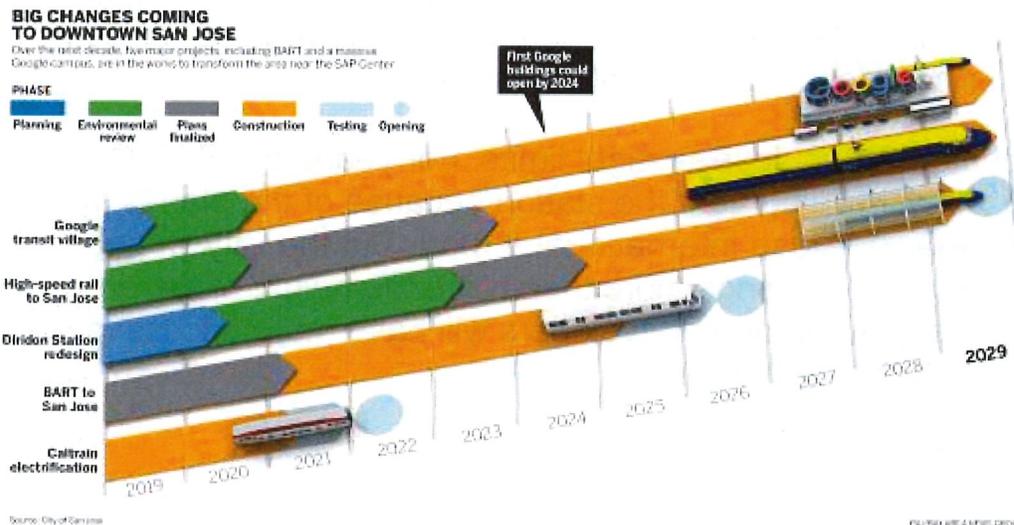
The Mercury News

Google's Big Plans For Downtown San Jose — Answers For All Your Questions

In the next decade, Google, BART and a new Diridon Station will transform San Jose

By Emily DeRuy | Bay Area News Group

July 21, 2019



A timeline of upcoming projects in downtown San Jose

There's been a lot of buzz about Google gobbling up land in San Jose and big plans for an overhaul of the city's sleepy downtown train station. But when will it all start to happen?

When will we see those artist renderings of the tech giant's gleaming new campus or shovels hitting the ground and cranes crawling across the sky? When will the first BART trains roll into Silicon Valley's new futuristic station? And what has to happen along the way before any of this gets done? Read on to find out.

The area around Diridon Station looks pretty quiet right now. So what will change that?

What for years has been a largely industrial area with squat buildings and sprawling parking lots is set to transform over the next decade into a densely packed extension of downtown — with taller structures, more public transportation and a lot more people.

Perhaps best known is that Google is planning to build a major campus with offices, homes and commercial space near Diridon Station. But the station itself is also set to get an overhaul because city planners expect it to serve thousands of more travelers in the coming years.

One reason? BART is extending from the East Bay through downtown San Jose and eventually to Santa Clara. At some point, high-speed rail could also connect Silicon Valley to the Central Valley.

Another big change? San Jose's height limits. For years, the SAP Center has been the tallest building near the station because of the planes flying into nearby Mineta San Jose International Airport. But the City Council recently voted to allow buildings more than twice the height of the arena in the area — so Google and other developers will have more access to real estate in the sky than ever before.

So when does it all happen?

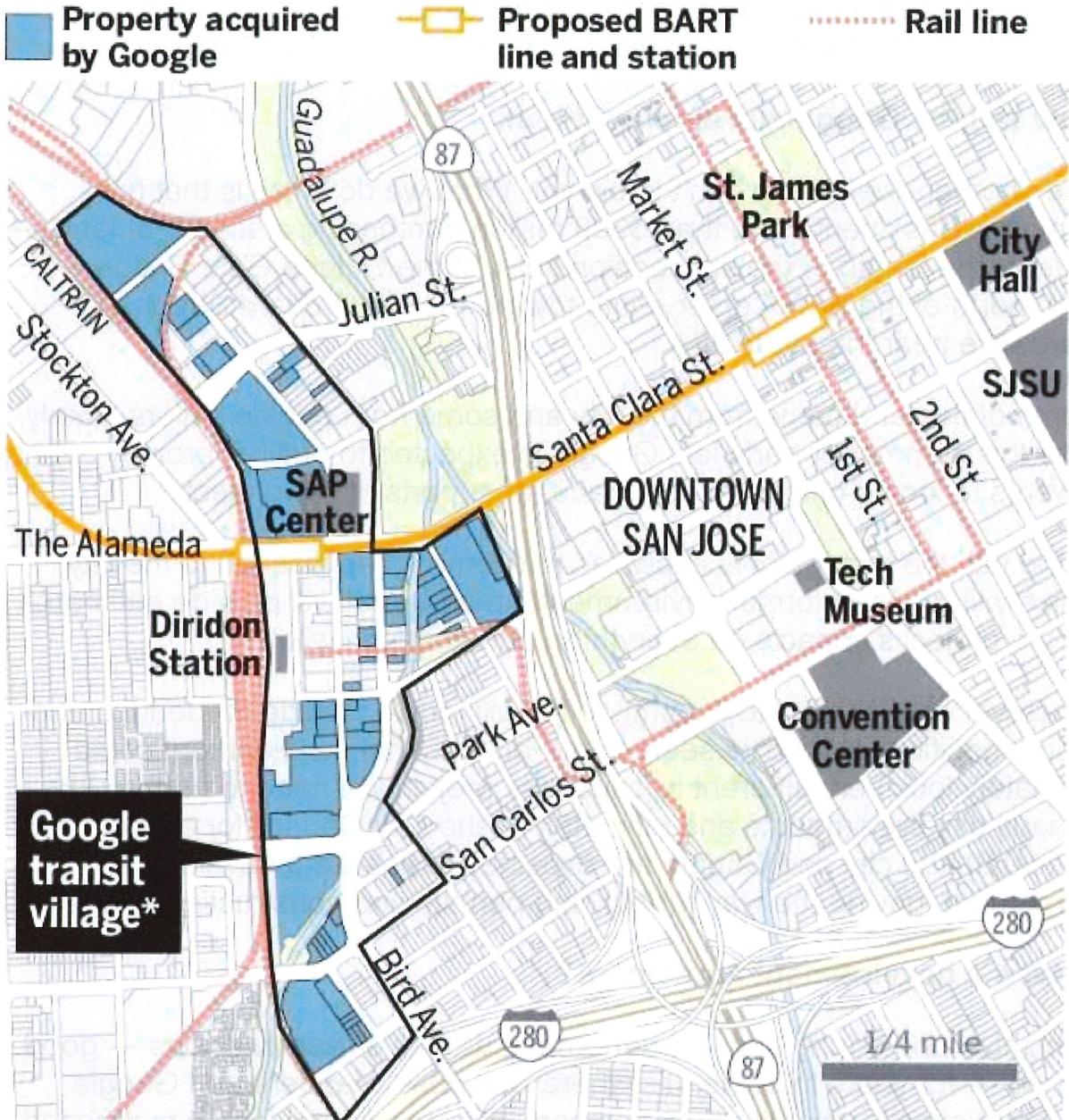
Caltrain is already converting from diesel- to electric-powered trains, which will mean more frequent train service down the Peninsula to San Jose. That process should be completed by 2022.

Next up will be the BART extension. New stations are scheduled to open in Milpitas and Berryessa later this year. Then, sometime in the next seven or so years, BART plans to add four more stations in Alum Rock, downtown on Santa Clara Street between Market and Third streets, at Diridon and in Santa Clara. BART and the Santa Clara Valley Transportation Authority (VTA), which is funding the construction and operating costs of the extension, are working on the design, schedule and funding. If everything goes according to plan, construction could start in 2021 and the four stations could open in 2026.

Around the same time construction begins on the BART extension, hammers and nails could start flying on the Google project, with some of the first buildings possibly being completed by around 2024-25.

AT THE CENTER OF IT ALL

Across from downtown San Jose and at the crossroads of two major freeways, Google's transit village will be a hub for Caltrain, ACE Transit, VTA light rail and the future BART line.



*Approximate area
Source: City of San Jose, Santa Clara County Assessor Office
BAY AREA NEWS GROUP

Construction is expected to begin around 2025 on a new downtown transit station that by 2029 or so should allow easy access to BART, trains, buses and more. San Jose has held a series of community meetings to discuss

ideas for how the station could look, but planning is still in the “big picture” phase, with big questions remaining — like where to put the station’s main entrance.

Drafts of environmental documents are expected in December for the high-speed rail project that could connect San Jose to Merced, and if funding comes through, the earliest trains could be running is by 2029.

How will the Google development look?

The short answer is, we don’t know yet. What we do know is that the company has spent more than \$300 million purchasing a stretch of land — roughly the length of the suspension span of the Golden Gate Bridge — from north of the SAP Center south toward the old Orchard Supply Hardware near Interstate 280.

Some of the land came from the city and some from private sellers. Likely later this summer or early fall, Google is expected to outline, broadly, where it wants to locate offices, housing and other parts of the project.

In the fall, the tech giant is expected to submit an application to the city, which will trigger a formal environmental review that will provide estimates on the project’s impacts on everything from traffic to wildlife.

Whatever application they submit to the city could include renderings and more specifics than we’ve seen so far, but the final development could ultimately look very different because the project will need to go through various city departments and ultimately to the City Council for approval. By Fall 2020, the city and Google are expected to finalize a development agreement, paving the way for building permits and construction in 2021.

What’s a development agreement?

It might sound boring, but this agreement will have repercussions — good or bad — for years to come. It’s where San Jose’s leaders and Google work out exactly what the tech company can do with the land it purchased and what the city’s residents will get in return.

Some residents and city leaders are concerned that the Google development will drive up home prices and displace longtime low-income residents. This agreement, which should be worked out by late 2020, is

where the city can require Google to build a certain amount of affordable housing. The city could also push for computers or programs for local schools, local hiring requirements or other community benefits.

Separately, the city also is exploring new requirements for businesses in the area beyond the development agreement with Google. While Google is set to be the largest developer near Diridon Station, with about 50 acres, there are another 200 or so acres near Diridon. Some of that land is likely to be developed by other companies as office space, housing or retail. The city is considering imposing a fee that companies like Google would pay to support, for instance, more affordable housing.

Traffic and parking are already bad. How will this make it worse?

We still don't have enough specifics to know exactly what the impacts of the Google project will be. The tech giant could bring 20,000 workers downtown, and other companies that move into the area could drive that number up. When Google turns in its application this fall with more details, San Jose can begin to evaluate how the project will affect everything from housing demand to local school enrollment.

What about construction?

Residents and visitors to San Jose will certainly see the consequences of so much construction, from street and sidewalk closures to reduced parking spaces, noise and dust. But there is some good news. The BART extension will be constructed using a single, deep underground tunnel that will avoid the need to tear up big sections of Santa Clara Street rather than a more invasive approach that would involve removing large sections of road and be far more disruptive to shops, businesses, pedestrians and drivers.

How do I keep up with what the city is doing?

Diridonsj.org has details about not only the redesign of Diridon Station but the coming Google campus. It also has information about the city's efforts to update what's known as the Diridon Station Area Plan, a document that guides development near the station. San Jose adopted a plan for the area back in 2014, but circumstances were different then. The city was anticipating an A's ballpark that never materialized. Google also hadn't come to town as a major anchor for the area, and the city hadn't raised

height limits yet. If the city makes major changes to the plan, they will have to go through a review process, which could kick off in the next year or so.

There's also a group of residents and local leaders who serve as members of a Station Area Advisory Group, which discusses all of these projects and provides feedback to the city and developers. The meetings are open to the public. The next meeting is expected to take place sometime in August, and future gatherings should continue every couple of months or so after that.



Aerial view of the area of Google's proposed transit-oriented village near the Diridon Station, on the western edges of downtown San Jose, California on Saturday, November 11, 2017. The proposed village would replace a hodgepodge of aging industrial, retail, dining, office and residential structures, along with vacant parcels and parking lots. (LiPo Ching/Bay Area News Group)

Anything else?

Yes, it's worth emphasizing that this timeline could — and, in some ways, will certainly — change. With so many different agencies and officials involved — and some major funding questions for things like the BART extension still unanswered — delays are likely. Other factors like a possible recession — which economists say is looming — and changing political leadership — Mayor Sam Liccardo has championed Google, but he terms out in 2022 — could also affect whether these projects are delayed or even derailed.

SANTA CRUZ SENTINEL

Bay Area Job Market Rockets To Fresh Gains In June, Region Has Nearly 4.1 Million Jobs

Experts: Horizon for Bay Area job market is cloud free

By: George Avalos

July 19, 2019



FREMONT, CA – FEBRUARY 27: Traffic is photographed along west bound 84 on the approach to the Dumbarton Bridge on Wednesday, Feb. 26, 2019 in Fremont, Calif. (Aric Crabb/Bay Area News Group)

The Bay Area's resilient job market, despite the forbidding obstacles of a brutal housing shortage and monster commutes, powered to fresh highs in June, a surge that extended throughout the nine-county region, state labor officials reported Friday.

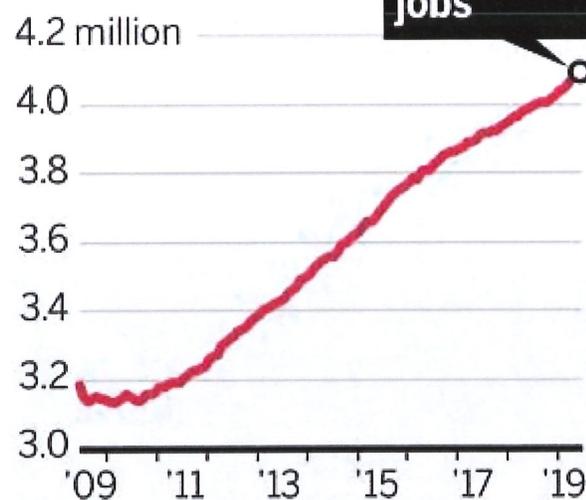
RECORD NUMBER OF JOBS

Bay Area employment surged again to record highs in June. The nine-county region produced more than half of all jobs created in California.

Jobs gained or lost in June

South Bay	3,800
S.F.-San Mateo Co.	3,500
East Bay	3,200
Sonoma County	1,100
Marin County	600
Solano County	500
Napa County	200
Bay Area*	12,900

Bay Area 10-year job trend



* Bay Area numbers are derived from seasonally adjusted data provided by the state EDD

Sources: State Employment Development Department and BANG staff research

BAY AREA NEWS GROUP

The boom in the Bay Area job market is so robust that over the first six months of 2019, the region has produced nearly 41 percent of all the jobs created in California during that half-year stretch — a jaw-dropping performance that occurred even though this area contains only 19 percent of the Golden State’s residents.

The fact is that the Bay Area continues to see very impressive growth in tech-related jobs, and that is why this region is growing much more strongly than the state,” said Robert Kleinhenz, economist and executive director of research with Beacon Economics. “The concentration of tech industry activity is one of the reasons the Bay Area continues to show so well.”

Employers in the Bay Area added 12,900 jobs during June, according to seasonally adjusted figures released by the state’s Employment Development Department. The area now has a total of 4.09 million jobs, as measured by nonfarm payroll employment, according to the EDD’s figures.

Those employment levels represent a record-high number of positions in the nine-county region.

“Bay Area employers are not seeing any clouds on the horizon,” said Stephen Levy, director of the Palo Alto-based Center for Continuing Study of the California Economy.

Santa Clara County led the upswing in employment last month, adding 3,800 positions, while the San Francisco-San Mateo metro area added 3,500 jobs, and the East Bay gained 3,200, the EDD reported. Santa Cruz County added 200 positions. All the numbers were adjusted for seasonal variations.

“Employers in the Bay Area are moving ahead with hiring despite the housing crisis and despite threats on the trade and immigration scene,” said Levy.

The technology industry is the major propellant that has helped the Bay Area rocket considerably higher than California and the United States overall, analysts said.

“We are really seeing strong growth in the tech sector, particularly in things related to cloud computing, data storage and digital streaming,” said Mark Vitner, a senior economist with San Francisco-based Wells Fargo Bank. “Every day, you see another company that is using technology to become more efficient. So much of that comes back to the Bay Area where so many of these technologies are being developed.”

California added 46,200 jobs during June and the statewide unemployment rate remained unchanged at 4.2 percent.

“The state continues to defy economic theories, with both low unemployment and low inflation, and has just completed 112 months of job growth, the second-longest employment expansion since World War II,” said Michael Bernick, a former EDD director and a Milken Institute fellow.

During June, Santa Clara County’s strongest industries were: hotels and restaurants, which added 1,500 jobs; retail, up 900; and the tech sector, which gained 800 positions, according to seasonally adjusted numbers compiled and analyzed by Beacon Economics and UC Riverside.

The East Bay's strongest industries were construction, which added 1,300 jobs, and administrative support and clerical sectors, which added 1,000 positions, the Beacon UC Riverside analysis determined.

In the San Francisco-San Mateo metro area, tech gained 2,900 jobs, but the hotels and restaurants sector lost 1,000 jobs in June, according to the assessment from Beacon and the university's business school.

Each one of the Bay Area's metro regions produced job gains during June, analysts noted.

Over the one-year period that ended in June, the Bay Area added 100,700 jobs, while California gained 296,100 positions — which means the Bay Area accounted for 34 percent of the statewide job gains.

During the most recent 12 months, job totals increased by 2.5 percent in the Bay Area, 1.7 percent in California and 1.5 percent in the United States, according to an analysis of statistics compiled by state and federal labor officials.

Yet, if anything, the Bay Area's dominance over California has become even more pronounced so far during 2019.

Over the first six months of 2019, the Bay Area gained 67,500 jobs, while California added 165,800 jobs. This means the Bay Area accounted for a head-spinning 40.7 percent of all the jobs gained in the state during the first half of 2019.

"Hiring has really kicked back into the fast lane," Vitner said.

A number of factors could coalesce to keep the employment boom in full swing. Among those factors, according to Vitner: Businesses, including brick-and-mortar merchants, are seeking to deploy additional technologies to become more efficient.

"One thing that could give the economy more room to run is that businesses continue to invest heavily in new technologies," Vitner said. "That could allow this expansion to continue even though we are already in record territory."

SILICON VALLEY BUSINESS JOURNAL

Rod Diridon On VTA: A Job Half Done



A VTA light rail train stops at Diridon Station in San Jose.

Jody Meacham

By: Rod Diridon, Sr.

July 18, 2019

Jody Meacham's fine Silicon Valley Business Journal article last week on the struggles of the Santa Clara Valley Transportation Authority dramatically highlighted the problem's genesis.

First, the transit system is only half built and most riders don't and can't use half a transit system. Second, in-fill development of critically needed housing atop rail stations has not occurred, which means that trip demand is not being focused on transit.

The Transit System

Over a four-year period from the early-to-mid '70s, Santa Clara County — under the policy authority of a joint powers board — had a team of some of the most experienced engineers and planners conduct a "Rapid Transit Development Project Study." Their charge was to design the best-

integrated highway and transit system in the world for a large valley with dispersed jobs and housing projected to grow exponentially.

After exhaustive research and design work, as well as several hundred public meetings, the region's first transportation master plan was approved by the JPB and the County Board of Supervisors as the County Transit Agency (the predecessor to VTA). County voters also gave their approval in March 1976 along with the first, permanent half-cent sales tax for transit in the state.

The approved plan envisioned intercity rail (now high-speed rail) connecting Silicon Valley to Central Valley metro areas; metro rail (BART) and commuter rail (Caltrain, Capital Train, Altamont Express) connecting the larger San Francisco Bay Area, and 140 miles of in-county light rail operating in a classic commute loop (Tasman west and east to Capital across east and south San Jose to the HW 85 or Permanente Rail corridors through the west side to rejoin the Tasman Line in Mountain View). Light rail spokes would extend into and out of the loop to serve major trip generators.

That combination of rail service, including more than 150 rail stations, would be supported by a bus feeder system providing timed-transfer service from the neighborhoods, coinciding with the arrival of the rail service at each station. That optimum core system works well throughout the world.

The designers and planners knew that building highways on every available bit of dirt would not come close to meeting future transportation demands, and so did the voters. So, the historic 1976 ballot measure — one that stressed transit — was approved with a mandate to build the classic, multimodal system quickly.

Three impediments interceded. First, highway advocates lobbied for and won the right to complete State Route 85 and widen Highways 101 and 237, absorbing over a billion dollars of potential transit construction funding without building the planned transit line in the west side corridor.

Second, anti-transit advocates started taking legal action based on the California Environmental Quality Act. Though those lawsuits rarely changed project design in a significant way, the delays were horrendous. With construction inflation averaging over 5 percent per year compounded, a

delay of 10 years would double project costs, not to mention increase the public's frustration. The system's cost increased correspondingly.

The resulting funding shortfall was exacerbated by the federal government reducing their normal matching fund rate from over 80 percent of a project to as little as 30 percent, if at all.

Third, local government adopted term limits, meaning that they lost the knowledge base and leadership continuity they garnered during the master planning and early construction projects. The new office holders often just wanted to do something different from their predecessors.

The result is that the fine, voter-supported CTA/VTA transportation master plan has been compromised several times and — 43 years later — is less than half completed.

Thanks to the great campaigns by Carl Guardino's Silicon Valley Leadership Group, our intelligent county voters continue to be supportive of transit funding. BART will be completed and Caltrain electrified and upgraded. Governor Gavin Newsom projects the state-funded Valley to Valley high speed rail connection to be under construction in the early 2020s.

But funding does not currently exist to complete the light rail commute loop and spokes, which is the throbbing heart moving riders from homes to the arterials of the master planned integrated system. The approaching terminal gridlock tells us that massive transit capacity is needed now more than ever.

Transit Villages

The second major component of the 1976 master plan that has not matured is major in-fill housing developments atop the rail stations and adjacent parking.

Those "transit villages" (called "trandominiums" in the 1990s) were envisioned to be placed atop every metro, commuter, and light rail station and parking. The parking would be placed in underground garages under podium platforms spanning the total area. Grass, playing fields, convenience commercial, and high-rise condo and rental towers were to be placed above the podium.

San Jose's approval earlier this year of allowing building up to 25 stories in the Diridon Station area is a strong step in the right direction. The county-wide system currently has over 60 rail stations, most of which have parking adjacent. That VTA-owned land is currently off the tax base but the added air rights development over the station and parking would yield property taxes to support Proposition 13 impoverished school districts, the county, and cities that already provide services to the station areas.

The new housing, 20 percent or so of which should be assigned to the County Housing Authority for lower income residents, would attract residents who work along the rail system — thereby eliminating the need for a second car, reducing living costs, and reducing highway congestion, urban sprawl, and climate changing pollution. Most rail stations and parking are buffered from surrounding single family neighborhoods allowing those high-rise transit village structures to be built with little intrusion on the neighborhoods and reducing the pressure to create high density housing in areas not served by transit.

But the cities, which control land use both within their municipalities and on VTA with 10 city council votes and only two from the county, have not implemented that plan. Instead, they've often approved four or five stories of in-fill development on street corners, many of which are not served by transit — force-feeding commuters by car into impossibly congested highways.

San Jose in the downtown area, Santa Clara in a couple of locations and Mountain View seem to be the only cities with the vision and courage to consistently approve true transit villages. The NIMBY opposition is a significant factor, especially in the small communities, and must be countered by a thoughtful YIMBY influence focused on consistent transit village in-fill.

The Solution

The 1976 master plan should receive minor adjustments to meet current conditions and be reaffirmed and funded by a massive local, state, national, and private effort. The emerging consensus support for significant carbon-disincentive fees of various kinds supported by added local matching funds might be a fitting final year's challenge for State Senator Jim Beall, who has been a great transit-supporting member of the Senate since 2012.

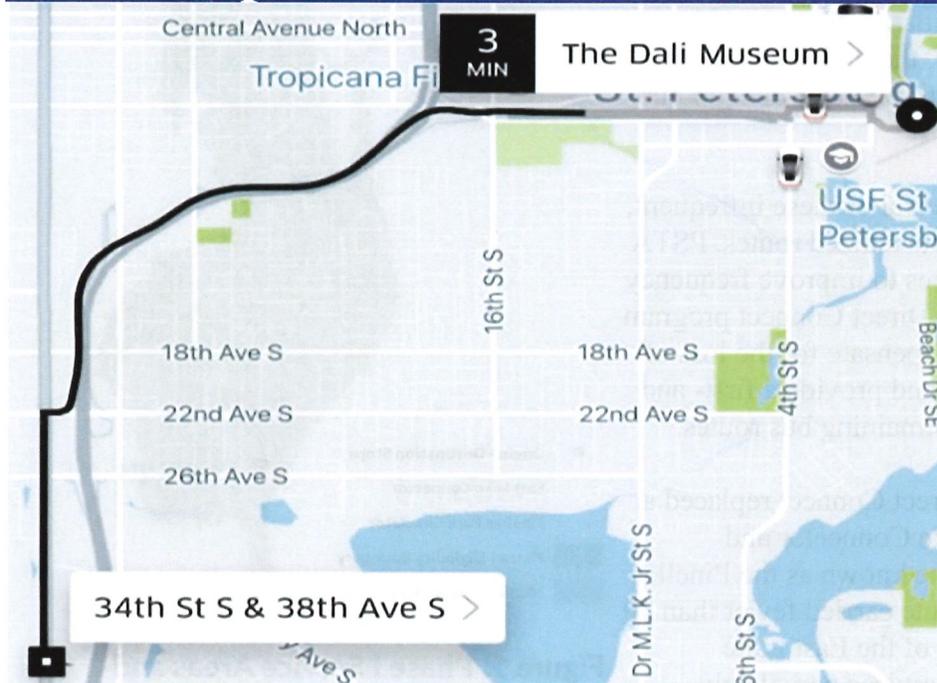
The VTA itself also needs to some change. The authority's board needs to be reconfigured to focus on creating a sustainable transit system by completing the master plan and promoting transit villages. Each city with rail stations should concentrate on creating structures that rise 20 stories and up atop those stations and parking to create the badly needed housing and ridership.

Let's sustain our valley's unique high tech job base while protecting our fragile environment. And let's aim to finish it all within the next 12 years — the target date scientists have set for major reductions in climate change pollution — before the Armageddon date for mammals on earth.

About the author: Rod Diridon, Sr., is a former Santa Clara County Transit Agency Chair, California High Speed Rail Authority Board Chair Emeritus, and U.S. High Speed Rail Association Chair Emeritus.

Jul 03, 2019

The Future of Transit Isn't a \$5 Discount on Uber Trips



Pinellas County's first foray into subsidized Uber trips "didn't rock anybody's world."

In 2016, the Pinellas Suncoast Transit Authority (PSTA), an agency outside Tampa that serves about 32,000 daily trips, became the first public transit agency to replace bus service with subsidized Uber trips. The Direct Connect program partially covers the cost of fares via Uber, traditional taxis, or wheelchair-accessible vehicles to areas near designated bus stops.

Press coverage was giddy. "Are partnerships with Uber the future of public transit?" more than one outlet asked.

Three years later, the results are in, and they are much more muted than the early headlines.

A new report (produced with support from TransitCenter) from the Shared Use Mobility Center, "When Uber Replaces the Bus: Learning from the Pinellas Suncoast Transit Authority's 'Direct Connect' Program," points to a narrow conclusion: If an agency wants to cancel inefficient, low-ridership bus routes, subsidizing a small volume of trips on an Uber-type service can soften the blow. But even then, difficulties obtaining precise and accurate data from Uber limit the ability to evaluate the Pinellas County program.

Since PSTA launched its program, transit agencies in Los Angeles, Seattle, Montgomery County (MD), and elsewhere have announced programs with companies like Uber and Via — either as a first- and last-mile connection to buses and trains, or a substitute in low-ridership areas. But the

results from Pinellas County indicate that subsidizing car trips is fundamentally limited as a complement to fixed-route service, and that even in small-scale applications, it may not be an efficient use of scarce agency resources.

In Pinellas, Direct Connect emerged from lowered expectations. After Tampa-area voters rejected a 2015 ballot initiative that would have increased transit funding, the PSTA board directed the agency to rethink low-ridership bus routes.

By cutting service on several of these infrequent, lightly-used-but-highly-subsidized routes, PSTA hoped to redirect resources to improve frequency on its core network. The Direct Connect program was intended to both compensate for the loss of the low-ridership buses, and provide a first- and last-mile connection to remaining bus routes.

In its initial iteration, Direct Connect replaced a route called the East Lake Connector and supplemented another one known as the Pinellas Park Circulator. Each route carried fewer than 30 trips per day. In the case of the East Lake Connector, on-demand services completely replaced the bus, and in the case of the Pinellas Park Circulator, the services were supposed to function as feeders for the bus, which continued to operate.

PSTA contracted with Uber, United Taxi, and Wheelchair Transport to provide the service. Riders would be eligible for a subsidy if they started or ended their trips within designated zones. Uber developed “geofences” to mark off these zones in its app, while discounts for the non-Uber providers were applied at the discretion of drivers, who would then invoice PSTA monthly for eligible trips.

The program rolled out in three distinct phases from 2016 to 2018. During the first phase, there were two eligible zones, and Uber was only permitted to serve one of them — the Pinellas Park Circulator area. A per-trip subsidy of \$3 left riders on the hook for an average of 75 cents more than they would have paid for a bus trip, though wait times were shorter. With fewer than two Uber rides ordered per day, one person involved in the first phase explained that “it didn’t rock anybody’s world.”

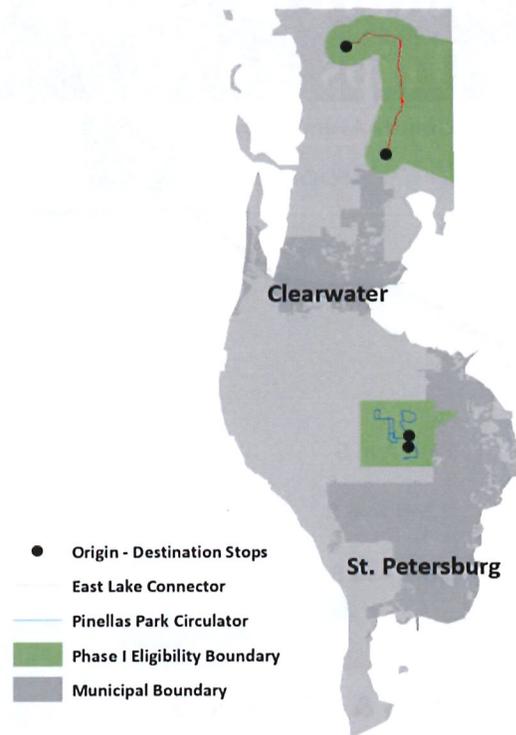


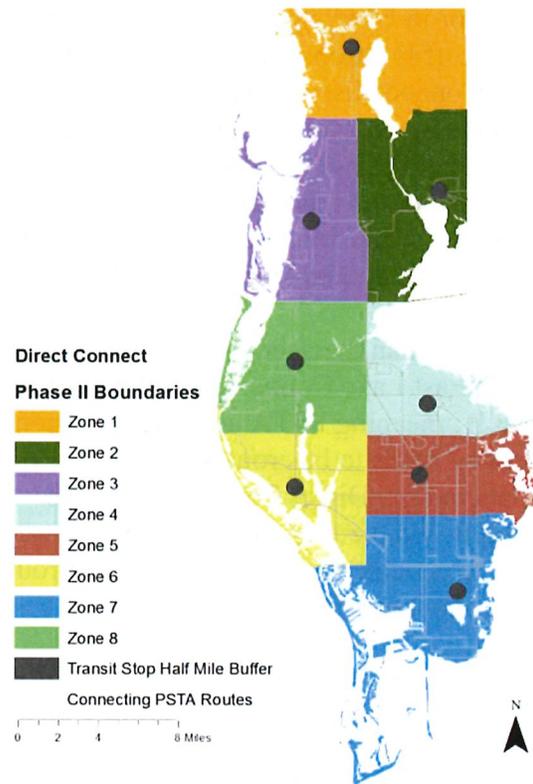
Figure 1: Phase I Service Areas and Eligible Origin/Destination Transit Stops

During the second phase of the program, the per-trip subsidy was increased to \$5, which nearly covered the entire cost of each ride. PSTA also upped the marketing budget and outreach efforts, and expanded the territory where riders were eligible for a discount to encompass the entire county. Pinellas was divided into eight zones, and within each zone riders could get subsidized Uber trips to or from one designated intersection. All told, these locations were within walking distance of 20 bus routes.

As you might expect, ridership increased, but the program still operated at a tiny scale, maxing out at about 40 trips per day. The same 10 individuals accounted for about 30% of all use. The Pinellas Park Circulator, meanwhile, gradually lost riders over the course of 2017 as Direct Connect ridership grew, and the route was cut in 2018. Instead of helping people connect to the bus route, the Uber subsidies appear to have cannibalized riders.

The third phase of the program began in 2018. Instead of eight zones with one pick-up/drop-off location each, riders could apply the \$5 subsidy to any trip in the county that originated or terminated at one of 24 designated locations. As a result, reported ridership soared above 4,000 trips in September of 2018, more than tripling the previous rate — or so it seemed.

Figure 2: Phase II Zone Boundaries, Eligible Stops and Connecting Routes



After those ridership numbers came in, the PSTA Board voted to extend the program three years, but the figures turned out to be greatly inflated. Thanks to an error in Uber's geofencing around the 24 pick-up/drop-off locations, many riders received the Direct Connect discount when they were ineligible to receive it, exaggerating usage between 60% and 300%. Uber did not bill PSTA for the erroneous subsidies, but the reporting glitch likely influenced the agency's decision to continue the program until 2021, with an annual budget of \$200,000.

That's less than the agency was spending on routes like the East Lake Connector, which cost \$400,000 annually, meaning PSTA could redirect some operating funds to bus routes with higher ridership. In that context, Direct Connect may have accomplished the goal of smoothing the way for PSTA to allocate its resources for fixed-route service more efficiently.

As a service on its own terms, however, it's hard to assess Direct Connect.

A lack of strategic objectives and accurate data makes it impossible to evaluate the program. PSTA did not lay out clear goals for the Direct Connect program. Combined with Uber's refusal to supply precise location data for pick-ups and drop-offs, this stymies attempts to assess success or failure.

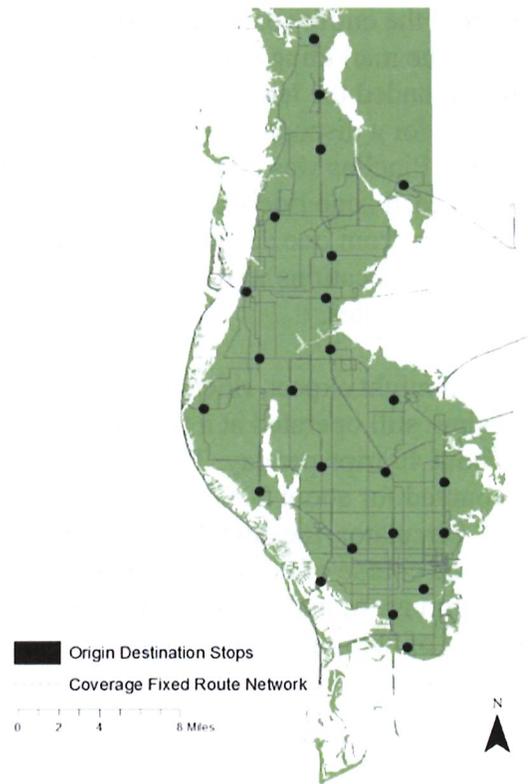
PSTA never conducted intercept surveys of riders or held focus groups, which would have helped the agency understand the program's effect on travel choices. For all the agency knows, it might be paying people to take cab trips they would have taken anyway.

There is no measurement of Direct Connect's effect as a first- and last-mile connection to fixed-route bus service. Given that the program served fewer than 100 trips per day at its peak, even if every passenger connected to transit it would not represent much of an impact on the agency's daily bus ridership.

The program isn't scalable. The small scale of Direct Connect highlights its inherent limitations, and why other agencies will find limited application for similar programs.

While the \$5 per-trip subsidy for Direct Connect rides is lower than the \$40 PSTA was spending per rider on the East Lake Connector, it's higher than the agency's average per-trip subsidy of \$3. The program still amounts to a diversion of resources from more productive fixed-route service.

Figure 7: Phase III Eligible Stops²⁹



A fixed subsidy per trip means there is a hard cap on ridership: The more trips people make via Direct Connect, the less financially viable it becomes, which is the inverse of how public transit works. And with the elimination of zone-based restrictions, the price of a trip can far exceed the \$5 subsidy, meaning riders are shouldering higher costs than a bus fare. As such, programs like Direct Connect are not going to replace fixed-route service that moves significant numbers of people at affordable prices.

Even Direct Connect's modest usage may not be possible much longer, given the artificially low price of VC-backed Uber fares. "Much of the [program's] cost savings depend on the on-demand service providers deriving most of their income from non-agency sources, often in non-unionized, lower-wage roles, as in the case of Uber drivers," the report notes. At some point the VC bubble will burst and workers will demand fair wages and compensation.

Lost in the hype for this program is that it was never intended to increase ridership. To get more people riding transit, PSTA knew it had to redirect operating resources to improve frequency on its core bus routes. The future of transit isn't a \$5 discount on Uber trips. It's fast, frequent, reliable fixed-route service that gets people where they want to go.



Bay Area Rapid Transit Fast Facts

CNN News

July 11, 2019

Here's a look at the San Francisco Bay Area's rapid transit system, which is referred to as Bay Area Rapid Transit (BART).

Facts:

San Francisco Municipal Transportation Agency (SFMTA), which operates BART and the Municipal Railway system (MUNI), manages all forms of San Francisco area transportation and traffic, including streetcars, cable cars, bicycles, pedestrians, taxis and parking.

The BART system services Alameda County (Oakland), Contra Costa County, San Francisco County and stations in San Mateo County. A BART extension, in partnership with the Valley Transportation Authority, is planned to stretch into Silicon Valley/Santa Clara County (SVBX).

There are 48 BART stations: 19 surface, 14 elevated and 15 subway stations.

There are 669 revenue vehicles, or cars.

There are about 121 miles of BART track.

The trains travel at 70 mph maximum, 35 mph average and make 20-second station stops.

Weekday ridership is 414,166 trips on average.

BART has its own police force with 206 legally sworn-in law enforcement officers and 90 other staff members.

BART has a security system that includes alarms, video surveillance and other intrusion prevention equipment.

All BART frontline employees receive emergency response training.

BART supplies a mobile signal to customers of major wireless companies in most underground tunnels and stations.

BART does not run 24-hours per day.

MUNI covers about 49 square miles of the Bay area with more than 75 bus, light rail, trolley, streetcar and cable car lines. (source: SFMTA)

BART crime stats from 2013 to June 2018.

Timeline:

1912 – The San Francisco Municipal Railway system (MUNI) is established. It is one of the oldest transit systems in the world.

May 24, 1962 – Three northern California counties, Alameda, Contra Costa and San Francisco adopt a plan to build a rapid transit system (BART) together. Originally Marin and San Mateo counties were to be part of the plan but they opted out.

June 19, 1964 – President Lyndon B. Johnson presides over the groundbreaking ceremony of the 4.4-mile test track between Concord and Walnut Creek.

November 1966-August 1969 – Construction of the Transbay Tube on the bottom of San Francisco Bay. The final cost of the tube is \$180 million.

September 11, 1972 – The system opens to the public from Fremont to Oakland.

January 29, 1973 – The second leg of the system opens and extends from Oakland to Richmond.

May 21, 1973 – The Concord line opens.

November 3, 1973 – The San Francisco line opens.

1974 – Express bus service opens from Daly City to Belmont.

September 16, 1974 – Transbay Tube opens to the public.

March 10, 1975 – BART and MUNI begin a transfer system, cutting fares in half for BART/MUNI combinations riders.

May 3, 1983 – The AIRPORTER bus service begins shuttles from the Embarcadero station to San Francisco International Airport.

March 21, 1994 – BART's new operation center opens underneath the Lake Merritt Administration Building.

November 1999 – San Francisco Municipal Transportation Agency (SFMTA) is created when MUNI and the Department of Traffic are combined.

June 22, 2003 – BART officially opens a line to San Francisco International Airport.

June 25, 2006 – BART ridership surpasses 100 million – 100,128,800 for the 2006 fiscal year ending June 30.

January 1, 2009 – BART police officer Johannes Mehserle shoots and kills unarmed Oscar Grant III on a BART platform at the Fruitvale Station in Oakland. Officer Mehserle later resigns, and is subsequently arrested, tried and convicted of involuntary manslaughter. Mehserle is released from prison in June 2011.

July 3, 2011 – BART and Oakland police shoot and kill knife-wielding Charles Blair Hill at the civic Center Station in Oakland.

August 11, 2011 – BART cuts off wireless network service for three hours at several San Francisco stations to prevent coordinated protests of the shooting of Hill.

August 15, 2011 – “Flash mobs” close several BART stations for more than two hours in protest to BART shutting off wireless service.

August 18, 2011 – BART Police Officers Association website is hacked for the second time by the group Anonymous in retaliation for the wireless service shutdown of August 11. The group publishes the personal and home information of the police officers on the Internet.

August 22, 2011 – BART stations close as protestors demonstrate against the wireless service shutoff.

September 9, 2011 – Arrests are made and the Powell Street BART Station closes as protestors attempt to demonstrate.

2012 – BART orders 775 new cars to be built by Bombardier Transit Corporation.

July 1, 2013 – BART unions go on strike. The dispute centers on pay and benefits.

July 5, 2013 – Although contract negotiations are not finished, BART union workers end their strike and return to work.

October 18, 2013 – Union workers at BART go on strike.

October 19, 2013 – Two BART workers are killed by a train driven by an “operator trainee” during a strike.

October 21, 2013 – Union leaders and the management of BART come to an agreement to end a four-day strike.

April 17, 2014 – OSHA State regulators fine BART \$210,000 for the safety violations that lead to the death of two BART workers in October of 2013.

August 28, 2014 – BART launches BART Watch, a mobile app that allows riders to report crimes and suspicious items or activities to BART Police.

November 22, 2014 – A monorail connecting Coliseum Station with Oakland International Airport begins operating.

June 24, 2015 – BART police adopt a new policy for interactions with transgender passengers, according to a statement on the BART website. The policy includes such guidelines as “if gender expression does not clearly indicate a transgender person’s identity, an officer may politely and respectfully ask how the person wishes to be addressed.

March 15, 2016 – The first of 775 new rail cars arrives at BART’s testing facility. The first in the new fleet will begin months of testing for safety, quality and integration before passengers ride in the new train car.

January 2018 – The first of 775 new train cars goes into service.

July 2018 – Three unrelated attacks occur within a five-day span at BART stations, leaving three people dead.

May 20, 2019 – BART announces that 84 new rail cars have been received, with 75 certified and 48 in service.

Robot Bus to the Beach? Driverless Buses for Smart Mobility Solutions

By: Tammy Waitt

July 10, 2019



Robot bus in Kalasatama district in Helsinki (Courtesy of Jari Honkonen, Forum Virium Helsinki)

Congested streets full of passenger cars are a challenge for growing cities around the world, and Helsinki is looking for means to decrease traffic congestion as well as emissions and other climate impacts caused by motor vehicles.

A key means to influence this is investment in public transportation, but its proportion of traffic has remained almost the same in recent years.

However, self-driving robot buses could increase the popularity and efficiency of public transportation in the future, which is why Helsinki has been testing them for several years.

‘The aim is to use the pilots to learn as much as possible about robot buses even in the early stages of technological development, such as how residents receive them, how they function as a part of public transportation and what they can offer to the mobility of citizens,’ says Jari Honkonen, Project manager at the City of Helsinki’s innovation company Forum Virium Helsinki.

Forum Virium Helsinki is the innovation company of the City of Helsinki, building Helsinki into the most functional smart city in the world in collaboration with companies, the scientific community and residents.

Robot buses can change public transportation significantly

Helsinki is committed to become carbon neutral by 2035 and, in line with this, recognizes that problems associated to traffic and transport need to be tackled.

Therefore, the city has laid down in its official strategy to act as a testbed and to promote new mobility technologies – of which automated demand-driven shuttle buses are a notable example.

By offering residents an emission-free transportation option, robot buses support Helsinki’s goals of carbon neutrality.

“If the robot bus technology develops as expected, they can develop public transportation in a more cost-efficient direction and enhance service levels by expanding its coverage to areas where the lines do not currently reach, making departures more frequent and public transportation more reachable”, added Honkonen.

Helsinki a forerunner in testing self-driving buses

Helsinki is working as an active test platform for pilots of smart traffic solutions, and the City’s strategy also aims to promote smart modes of transport.

As a result, Helsinki has become a world-class test city for robot buses, where increasingly challenging pilots are conducted in various project each bringing new learnings and increasing know-how in Forum Virium Helsinki and the city’s stakeholders.

The forerunner position of Finland is made possible by flexible legislation and the close-cooperation of the public authorities.

To support autonomous mobility in the Helsinki region, major stakeholders, Metropolia University of Applied Sciences, the Helsinki city transportation planning division, the

Helsinki Regional Transport Authority, and, importantly, the Finnish Transport and Communications Agency Traficom which is in charge of giving out testing permissions, are working closely together.

An important factor for the development of smart mobility solutions has been the EU funding, the projects have received.

Coming up – autonomous buses among traffic without a steward

This year, two robot bus lines operate on the streets of the city. Bus number 26R in Kalasatama started in May and will operate until November.

This is a pilot by the European mySMARTLife project.

Bus number 90R, which started its route recently in June, will take passengers from near the Vuosaari metro station to the Aurinkolahti beach until September.

This pilot is organized by Metropolia University of Applied Sciences and Forum Virium Helsinki and their partners as a part of the Sohjoa Baltic project.

On both routes, the robot bus drives amongst regular traffic and the ride is free of charge for the passengers. The buses will be added to Helsinki's public transport route planner reittiopas.

In the spring of 2020, robot buses are again taking a leap forward, as the significant international robot bus project FABULOS brings self-driving buses for the first time to the streets in various EU countries as a fleet, in mixed traffic in the city centre, without a steward on board and remotely operated from a control room.

The companies involved in FABULOS are mostly new to this market, thereby widening the playing field and expanding the choices cities have for this new form of transportation.

'All these different pilots are part of an ongoing process in which new technologies are gradually tested in increasingly challenging environments and the lessons learned are transferred from one project to another,' Project manager Ulla Tikkanen from Forum Virium Helsinki explains.

There is still much to be tested around self-driving buses, so the pilots will continue for the years to come, ultimately contributing to making Helsinki the most functional smart city of the world.

METRO

Transpo GM/CEO Hill Talks 'Benefits' Of Being A Smaller Transit Agency

By: Janna Starcic, Executive Editor

July 4, 2019



Transpo's Emil "Lucky" Reznik Administration, Maintenance, and Operations Facility opened in 2010 and is LEED Platinum-certified. CEO/GM Amy Hill shown (on right) in facility.
Jamie Hernandez

Amy E. Hill, MPA, is the GM/CEO of the South Bend Public Transportation Corp. (Transpo). She joined Transpo in April 2013 as director, marketing, and was named the Interim GM/CEO in December 2017. She was appointed to the permanent position in November 2018.

Under her leadership, Transpo has rebranded, transitioned to designated bus stops, and launched innovative programs to increase ridership. Amy

currently serves on the Small Operations and Marketing & Communications committees for the American Public Transportation Association.

As a smaller transit agency, what are some of your challenges?

Funding is always a challenge for us. The Public Mass Transportation Fund (PMTF) for the state of Indiana has not seen a significant increase in years and the current funding structure favors larger agencies with additional resources to expand service and increase ridership.

It is also a challenge to secure the local 20% match required with Federal Grants. Transpo was awarded \$4.9 million in FY2018 Bus and Bus Facilities Infrastructure Investment Program to replace 12 diesel buses that have exceeded their useful life. We are still working to secure the required local match of \$1.2 million dollars to move forward with the bus replacement. We are hoping to secure a state grant to use towards the local share.

Another challenge is maintaining competitive and affordable health insurance for the organization and employees. In response to rising health insurance premiums, Transpo made the decision to join the county's self-funded health insurance plan in 2017 to provide a more competitive option.

Are there any benefits to being a smaller agency?

Yes, as a smaller transit agency we have to be resourceful and creative to engage the community, raise awareness of the value, and economic impact of public transportation in our community while working to improve service and increase ridership.

As a smaller agency, we also work to leverage partnerships with other businesses and organizations in the community. By building relationships, we are able to launch new programs and initiatives such as our Game Day Express route that launched in 2017 to provide an express connection between downtown South Bend and the University of Notre Dame for Football Saturdays. Through our partnerships, we are able to offer the service for free to the public.



As a smaller agency, the number of employees we have ensures that we all know each other, creating a cohesive team and positive work environment, says Transpo GM/CEO Amy Hill (center).

Jamie Hernandez

Finally, as a smaller agency, the number of employees we have ensures that we all know each other, creating a cohesive team and positive work environment.

Discuss some of measurable benefits, including cost-savings and sustainability of your LEED-certified maintenance facility.

Our Emil 'Lucky' Reznik Administration, Maintenance, and Operations Facility opened in 2010 and is LEED Platinum-certified. The current facility is twice the size of the previous 100-plus-year-old facility, but operational costs have been maintained. All our vehicles are now stored inside the facility, which is a significant cost and time savings, particularly in the winter months. Here are some additional highlights and cost-savings measures:

- Solar panels on the roof of the facility generate a portion of the electricity.
- Low-flow and sensor-activated water systems result in 40% less water being used; bus wash utilizes recycled water with only the final

rinse being fresh water, which is captured and reused; 70% of water is recycled.

- 90% of work areas are illuminated by natural light from windows reducing the need for artificial lighting; 20 skylights in the garage /bus barn.
- Geo-thermal heating and cooling — 48 geothermal wells that are 300 feet deep.
- Maintenance area flooring provides 90% reflectivity for the work area; exterior concrete is heated to reduce cost/time with snow and ice removal in the winter.

Please discuss a current program/project.

We partnered with the Michiana Area Council on Governments (MACOG), operators of the Interurban Trolley, serving the cities of Elkhart and Goshen, in the adjacent county to launch the new Yellow Line route in August 2018. The route is jointly operated by Transpo and the Interurban Trolley. This integrated service expands regional connectivity by improving frequency from every 60 minutes to 30 minutes. This increased frequency provides riders the ability to connect with almost every transit route within 15 minutes at the transfer centers. By jointly operating the route, both agencies are able to maximize efficiencies, improve service, and provide better connections to employment opportunities throughout St. Joseph and Elkhart counties.

This summer, we have partnered with enFocus (<https://sbenfocus.org/>) to complete a technology assessment. This partnership will provide us with an inventory of current technology, review best practices in transit technology, and identify opportunities and areas for investment (along with funding resources) in technology to improve efficiencies and the rider experience.



As a smaller transit agency, Transpo has to be resourceful and creative to engage the community and raise awareness of the value and economic impact of public transportation, says Transpo GM/CEO Amy Hill (shown left).
Jamie Hernandez

Discuss Transpo's recent AdWheel award win and what it entailed?

Transpo won a first place AdWheel award for 'Best Marketing and Communications to Increase Ridership or Sales' for our 2018 K-12 Summer Travel Program. Transpo goes on to compete for the AdWheel Grand Prize round (announced at the APTA Annual Meeting in October).

Transpo launched a Summer Travel Pass in 2013 for a discounted rate of \$30. In 2018, Transpo launched a new Summer Travel program to reach more K-12 students and provide free unlimited travel during the summer months. The goal was to introduce and educate students on the ease and convenience of using public transportation. The long-term goal was to increase ridership during the school year and develop life-long public transit supports and riders.

We were able to accomplish this on a 'shoestring' budget by engaging our community partners. The program was announced with a creative roving press conference on board a Transpo bus. The media were joined by representatives from Transpo, area school corporations, parks, and community centers. The 75-minute tour highlighted many aspects of the community accessible by transit.



Jamie Hernandez

Several weeks later, Transpo created a music video showcasing local students to promote the Summer Travel Program. The video was sponsored on social media all summer with the goal of obtaining 12,000 K-12 student rides — we averaged 5,977 with the discounted Summer Travel Pass 2013-2017. The program exceeded all expectations with record-setting ridership of 27,751. The overall budget for the program was \$3,555.

Are you looking to explore different zero-emission technologies? Our facility was designed with the intent to pursue alternative fuels. In 2014, as part of Transpo's Fleet Replacement Program, we began replacing aging vehicles with new buses powered by compressed natural

gas (CNG). Out of our 47 fixed-route vehicle fleet, 22 buses are now CNG with federal funding secured to replace an additional 12 diesel buses with CNG.

In 2016, Transpo opened a CNG Fueling Facility in partnership with the City of South Bend.

At this time, our plans are to continue replacing aging diesel vehicles with CNG, subject to available funding, but we continue to be open to other zero-emission technologies as we move forward.

How are you working to fill service gaps or provide alternative mobility options?

The City of South Bend was selected by Bloomberg Philanthropies to receive a \$1 million grant to develop a Transportation-as-a-Benefit program in partnership with local employers

(<https://mayorchallenge.bloomberg.org/ideas/south-bend/>). The intent of this program will be to fill public transportation service gaps and offer alternative mobility options to low-income employees. This will also be leveraged to promote the use of public transportation where applicable.

We have also worked with Lime to provide bike-share and e-scooters as first/last-mile options.

SFGATE

These Bay Area Transit Agencies Just Raised Fares As Of Monday

By: Nikki Tran

July 1, 2019



Photo: Paul Chinn / The Chronicle - Passengers board an inbound N-Judah streetcar at 48th Avenue in San Francisco, Calif. Muni is one of the transit services that will increase their prices starting July 1.

It is the beginning of a new month and, unfortunately, the start of new fare rates for most transit services in the Bay Area. Fares have increased for Muni, AC Transit, San Francisco Bay Ferry, and Golden Gate Transit. There are no changes to the cost of BART or Caltrain, but the Golden Gate Bridge is getting more expensive to cross and California drivers are being hit with a new gas tax.

In each case, the mid-year change comes months after approval of the increases, but for those who missed the initial reporting, we've broken out the info on fare hikes below:

Muni fare changes

Increase in single-trip fares using cash and Limited Use Tickets. (Clipper fare is unchanged with a single ride still at \$2.50 for adults and \$1.25 for a discount ticket.)

- Adult Single Ride Fare (Cash/Limited Use Tickets): from \$2.75 to **\$3.00**
- Reduced Fare Single Ride (Cash/Limited Use Tickets): from \$1.25 to **\$1.50**

Increases in monthly “A” and “M” passes for unlimited travel for Muni and BART.

- Adult “M” Monthly Pass (Muni Only): from \$78.00 to **\$81.00**
- Adult “A” Monthly Pass (+BART in SF): from \$94.00 to **\$98.00**
- Reduced Fare Monthly Pass (Muni only): from \$39.00 to **\$40.00**

AC Transit fare changes

Increase in fares using cash.

- Adult single-ride cash fare: from \$2.35 to **\$2.50**
- Youth/senior/disabled single-ride cash fare: from \$1.15 to **\$1.25**
- Adult day-pass cash fare: from \$5.00 to **\$5.50**
- Youth/senior/disabled day-ride cash fare: from \$2.50 to **\$2.75**

Increase in 31-day pass for youth/senior/disabled (no change to adult 31-day pass, which remains \$84.60)

- Youth/senior/disabled 31-day pass: from \$30 to **\$34**

Increases in Clipper.

- Youth/senior/disabled single-ride: from \$1.10 to **\$1.12**
- Adult Local to Transbay upgrade: \$3.15 to **\$3.25**
- Youth/senior/disabled Local to Transbay: \$1.60 to **\$1.63**

San Francisco Bay Ferry new fares

Overall 3% increase, which means approximately 20 cent increase for cash riders, 10 cents for Clipper users, and 10 cents for discount tickets for most one-way trips.

Alameda/Oakland/San Francisco

- Adult cash riders one-way: from \$7.00 to **\$7.20**
- Adult Clipper one-way: from \$5.30 to **\$5.40**
- Youth/senior/disabled riders one-way: from \$3.50 to **\$3.60**

Harbor Bay/San Francisco

- Adult cash riders one-way: from \$7.30 to **\$7.50**
- Adult Clipper one-way: from \$5.50 to **\$5.60**
- Youth/senior/disabled riders one-way: from \$3.60 to **\$3.70**

Richmond/San Francisco

- Adult cash riders one-way: from \$9.00 to **\$9.30**
- Adult Clipper one-way: from \$6.75 to **\$7.00**
- Youth/senior/disabled riders one-way: from \$4.50 to **\$4.60**

South San Francisco/Alameda/Oakland

- Adult cash riders one-way: from \$8.80 to **\$9.40**
- Adult Clipper one-way: from \$7.90 to **\$8.10**
- Youth/senior/disabled riders one-way: from \$4.40 to **\$4.70**

Vallejo/San Francisco

- Adult cash riders one-way: from \$14.60 to **\$15.10**
- Adult Clipper one-way: from \$11 to **\$11.30**
- Youth/senior/disabled riders one-way: from \$7.30 to **\$7.50**

Golden Gate Bridge

2-axle vehicles increased toll rates:

- 2-axle vehicles, regular toll: from \$8.00 to **\$8.35**
- 2-axle vehicles, FasTrak: from \$7.00 to **\$7.35**
- 2-axle vehicles, Pay-As-You-Go: from \$8.00 to **\$8.20**
- Carpool toll: from \$5.00 to **\$5.35**

Multi-axle vehicles toll rates also are rising.

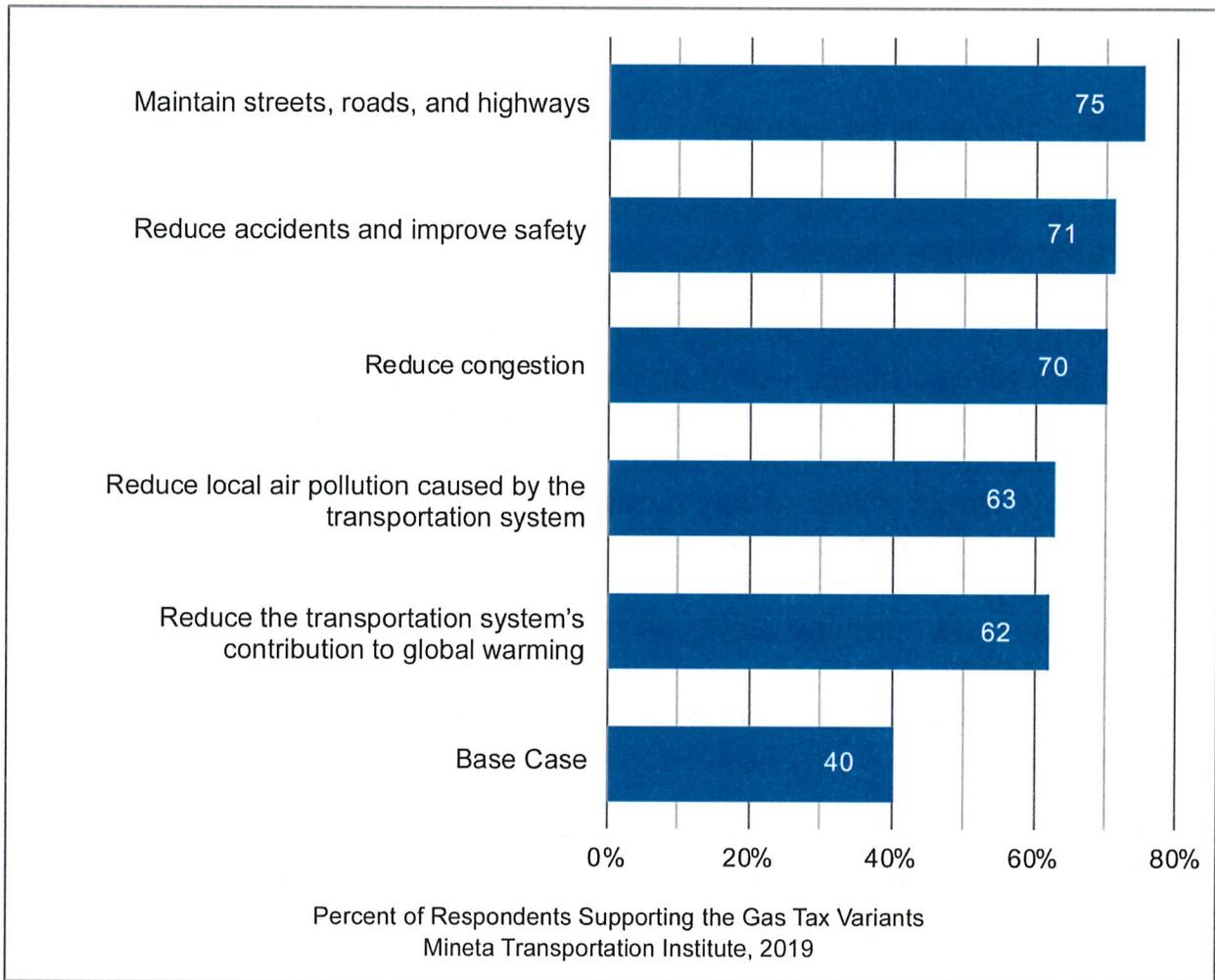


Support For Raising The Federal Gas Tax Has Risen Steadily Since 2010

Results released from the Mineta Transportation Institute's 10th annual national transportation tax survey.

Mineta Transportation Institute (MTI)

June 24, 2019



Mineta Transportation Institute

The Mineta Transportation Institute has released its tenth annual survey exploring public support for raising federal transportation revenues through gas taxes of mileage fees: What Do Americans Think about Federal Tax Options to Support Transportation? Results from Year Ten of a National Survey.

“Support for raising the gas tax is largely dependent on how the revenue will be spent,” says Dr. Asha Weinstein Agrawal, one of the study’s authors and Director of MTI’s National Transportation Finance Center. “Seventy-five percent of respondents supported a 10¢ increase in the gas tax if the revenue raised is dedicated to maintenance projects, but only 40% support the same increase if the money is used more generally to maintain and improve the transportation system.” (See Figure.)

Five of the same gas tax options have been tested each year to assess trends. Study co-author Dr. Hilary Nixon notes that in every case support has risen since 2010, with an increase for each of 13 percentage points or more.

Other key 2019 findings include:

- Large majorities value transportation improvements across transportation modes, including spending gas tax revenue for road and public-transit-related projects.
- People do not have an accurate understanding of how much they pay in federal gas taxes. For example, 19% of respondents thought the federal gas tax rate is at least 76¢ per gallon, far higher than the current rate of 18.4¢ per gallon.
- People would prefer to pay a mileage fee each time they buy fuel or charge an electric vehicle, rather than being billed monthly or annually.
- People hold nuanced views on mileage fees with respect to equity and privacy
- Linking transportation taxes to environmental objectives can increase support.

“We face growing needs across our transportation system, but funding hasn’t kept pace,” says Dr. Agrawal. “To solve this dilemma, we must either lower our goals for system maintenance and improvements, or raise new revenues.”

Mercury News

VTA Bus, Light-Rail Service To Continue Monday As Union Goes Radio Silent

The union said it would consider striking if members rejected the VTA's proposed contract



A passenger boards a VTA bus at the Eastridge Transit Center in San Jose, Calif., on Thursday, April 14, 2016. Bus and light-rail service will resume as normal Monday despite earlier indications from the VTA's largest union that it would go on strike. (File photo by Gary Reyes/Bay Area News Group)

By: Erin Baldassari Bay Area News Group

June 23, 2019

Commuters who rely on bus and light-rail service in Silicon Valley will be able to continue riding their regular routes Monday, after a union representing drivers failed to give notice of a strike.

The Amalgamated Transit Union Local 265, which represents drivers and other workers at the Santa Clara Valley Transportation Authority (VTA) has gone silent, declining repeated requests from this news organization to comment on their intentions. Representatives from the union said earlier in the week it would consider striking should workers reject the authority's latest contract proposal.

That happened on Wednesday, when workers voted overwhelming against the proposal. But since then, representatives from the union have declined to announce any further action.

Holly Perez, a spokeswoman for the VTA, said Friday evening the authority had not yet heard from the union. She didn't respond to questions about whether negotiations had resumed, though the authority's governing board did take up the issue of contract negotiations during a closed session of its board meeting on Friday. A representative from the union also declined to comment on the status of negotiations.

The two sides have been negotiating since August, and while they've agreed on a number of issues, they're still at odds over differences in pay, pensions and scheduling, among other sticking points.

Several commuters on Friday said they were generally supportive of a possible strike but were hoping for advanced notice so they could plan alternate commutes. Phillip Leung, a 21-year-old Dublin resident, takes BART and a VTA express bus to get to his externship at the U.S. Patent Office in San Jose.

He doesn't have a car, so he's not sure how he'll make it to his job without the bus, he said. He's familiar with the carpooling app, Scoop, which pairs carpool passengers with drivers in their area and said he would consider using it.

"So I think there are some other options," Leung said. "Hopefully, when they announce the strike it will be well-known and they'll post it online to make people aware that their normal form of transportation may not be available to them so they can find alternate forms."

The union must give the VTA a 72-hour notice of any work stoppage. If that happens, the VTA would also notify the governor's office, which has 72 hours to issue a ruling preventing the strike, should it determine the stoppage would create a public safety hazard.

Marion Campisi travels from her home in Oakland to teach mathematics at San Jose State University, she said, a trek that takes her on BART and a VTA bus. She said she, too, is not sure how she'll make it to work if there is a strike. She might take the Capitol Corridor train to Diridon Station, she

said, and then figure out some other way to bridge the remaining mile-and-a-half from the station to the school.

“If this bus didn’t run, it would be very difficult,” Campisi said. “But on the other hand, I’m a big fan of unions. I believe in good working conditions and good pay.”

She added, “So if they need to strike, they need to strike.”

SOUTHBAY

VTA Slammed In Santa Clara County Civil Grand Jury Report

By: Anoushah Rasta

June 21, 2019

The Santa Clara County Civil Grand Jury is slamming the Valley Transportation Authority.

In a 61-page report, the jury criticizes the bus and light-rail operator's leadership and how it is spending taxpayer money. The report comes as VTA workers appear headed for a strike.

"VTA operates one of the most expensive and least efficient transit systems in the country," the report said. "Empty or near-empty buses and light rail trains clog the county's streets, but are used regularly by fewer than 5% of the county's commuters."

"If they were more efficient in the way they operated, then probably more people would use it," VTA rider Joseph Bedodo said of the agency.

Other VTA riders said the trains do not run as frequently as people need them and that fares keep getting more expensive.

Some riders defend the agency and said it does exactly what they need.

"You can get pretty much anywhere in the city using the buses or the light rail," VTA rider Anthony Castillo said.

The Civil Grand Jury report is also critical of VTA board members and their "poor performance."

"The level of capability does not appear to be present" when it comes to making the right changes, the report said.

The grand jury said the multi-million dollar Eastridge Extension Project is also an issue, writing "The project makes no financial sense and survives only because powerful forces continue to support it."

VTA's board chair was not available Friday for an interview about the report.

VTA posted the following on its website in response to the grand jury report:

The Santa Clara Valley Transportation Authority (VTA) received a report from the Santa Clara County Civil Grand Jury dated June 18, 2019.

This report carefully examines the operation and governance of VTA as part of their responsibility to assure the public interest in governmental entities.

VTA is appreciative of the time and effort that this Civil Grand Jury expended on the operation and governance of this large and complex organization. VTA is responsible for the provision of public transit through the operation of bus and light rail in Santa Clara County as well as partnership in regional transportation operations such as Caltrain, ACE and Capitol Corridor. VTA is the Congestion Management Authority for the County and provides for the construction of highway and interchange improvements. We serve as the custodian of the public's resources in order to provide transportation options that allow people to access jobs, education, health care and entertainment.

VTA is committed to transparency and the prudent allocation of the resources entrusted to us. To that end, the Board established an Ad Hoc Financial Stability Committee that provided direction on steps to improve the financial direction of the organization. Many of these steps are already implemented. An Ad Hoc Board Enhancement Committee is currently meeting to address improving the effectiveness of Board Members and making better use of the time spent in Board and Committee meetings.

We intend to carefully review the report provided by the Civil Grand Jury. The report will help to inform the work we are currently performing. After a careful and thoughtful review of the issues presented in the report, VTA will provide a response as requested within 90 days.

KTVU

Grand Jury Report Says VTA Is Most Expensive, Least Efficient In Entire Country

By: Jesse Gary, KTVU

Posted: June 21, 2019

SAN JOSE, Calif. (KTVU) - A scathing grand jury report released this week blasts the Valley Transportation Authority as, "the most expensive and least efficient" in the country.

That evaluation comes at the end of a five day period that sees VTA leadership bracing for a possible work stoppage by members of the Amalgamated Transit Union.

At the intersection of light rail and bus lines in the South Bay, there are calls for major changes to the VTA system.

Regular riders said criticisms contained in the grand jury report mirror complaints decades in the making.

"It's sad but true, yeah," said passenger Julie Miranda, "because they're raising the rates, and it's like, for what?"

Whether by bus or on the rails, dissatisfaction with Valley Transportation Authority seems common.

"They usually come late. It's crowded. And it's a hassle," said Marie Valenzuela, who regularly rides VTA.

It's also a waste of taxpayer money, according to a Santa Clara County Civil Grand Jury report, released this week.

The 61-page document says the VTA "...is too big and too political to make sound financial decisions..." And that "...the (VTA) board is in need of structural change...to better protect...taxpayers."

"There's too many directors. They shouldn't have conflicts of interests, as being city council members or supervisors. Because that's their primary

responsibility, to represent those cities and the county," said Andrew Boone, a San Jose city council candidate and VTA critic.

VTA's recently appointed the board chairwoman, Teresa O'Neill, is also a council woman from Santa Clara.

She addressed the report's criticisms at Friday's VTA Board meeting at the Santa Clara County Board of Supervisors chamber.

"We have rather a unique model of a governing board of a transit agency. And we should really look at what other transit agencies around the country are doing. And if having a different configuration of the board would help the agency be more effective in the residents that we serve," said O'Neill.

Currently, each larger city in Santa Clara County appoints multiple board members.

Smaller cities must consolidate and share one member, and there are also six alternates, and ex-officio officers.

Experts say that recipe, combined with dwindling fare receipts from light rail, creates too many challenges for the system.

"They have systemic problems that I think are in part due to the rail system, that make it extraordinarily difficult for them to have moved into a more efficient operating rail system," said Dr. Hillary Nixon of the Mineta Transportation Institute.

Added board chairwoman O'Neill, "This is when we all have to step up and really dig down and figure out what can we do to solve problems."

The Board has 90 days to respond to the Civil Grand Jury report.

O'Neill said a newly-formed board Governance Committee is analyzing how to implement some of the recommended changes – such as directly electing board members instead of members being appointed.

METRO

Why Employers Should Care About The Length Of Employees' Commutes

By: Matt Caywood

June 19, 2019



Commuting is often the single least satisfying activity out of all daily activities, according to a 2004 study.

Marc A.Hermann/MTANewYorkCityTransit

The average American has a commute of 26.9 minutes each way. Twice a day, five times a week, 52 weeks a year — that adds up to more than 9 days behind the wheel every year. And that's just the average. More than 14 million people spend over an hour each way to work.

What else does that add up to? A huge toll on their social, psychological, and physical health. Commuting is often the single least satisfying activity out of all daily activities, according to a 2004 study.

Physically speaking, a long commute is correlated with high-blood pressure from increased stress, backaches from poor posture, and even more psychosomatic disorders with exhaustion, sleep deprivation, and dizziness topping the list. Socially, commuting takes up a lot of time that could be better spent doing literally anything else. That also includes time with family and friends, an important aspect of an individual's overall mental health.

At the office, a long commute can make people unproductive, as they spend significant time in the morning de-stressing from their time in the car. What's more, 23% of workers have left a job due to a bad commute — and 60% of people feel as though their company doesn't do enough to help with it.

So how *can* companies help alleviate the pains of commuting? From providing employees with access to alternative mobility options, to implementing other transportation demand-management tools, there are a lot of strategies on the table.

The best way to combat the toll driving alone takes is seemingly straightforward: Don't drive alone as your commute. But access to reliable transportation options is far from a given, so for most people it's simply not feasible to make that change without some extra assistance.

It's time to consider the multitude of other ways people can get to work that aren't necessarily traditional public transportation options.

For companies who have the ability to do so, a private shuttle can make up that first-/last-mile difference. Companies across the country, particularly in areas directly outside of a city's central business district, have started providing shuttles to take employees to and from nearby train or metro stations. Alternatively, some companies also provide on-demand shuttles for employees who work alternative or late hours.

Once employees gain the confidence to complete their roundtrip safely via an alternative form of transportation, they feel more comfortable opting not to drive to work in the first place. If nothing else, they'll know they can drive to a nearby metro station and commute the rest of the way there without having to be behind the wheel — lessening the burden of an hour-long commute.

Additionally, it's time to consider the multitude of other ways people can get to work that aren't necessarily traditional public transportation options, many of which have ways for corporate employers to easily manage accounts. Uber, Lyft, and Via, for example, all offer business accounts that allow employers to distribute funds and manage usage for employees, even going so far as to only encourage them to take shared rides like uberPOOL or Lyft Line.

Offering employees a transit subsidy or a bikeshare membership can also help to bridge the first-/last-mile difference, while also encouraging a more sustainable lifestyle. These types of commutes actually increase happiness, which leads to increased productivity at work. As an employer, having happy and productive employees is key, so helping to improve the commute is essential.

Regardless of how it happens, it's clear that something needs to be done in the way of the daily commute to keep employees as stress free as one can be on the job. Employers who are dedicated to fixing the broken commute and taking the necessary steps to alleviate this pain will not only see a happier workforce, but a more productive one as a result.