



**ADMINISTRATIVE AND FINANCE COMMITTEE**  
**THURSDAY, OCTOBER 12, 2017– 8:00 A.M.**  
**OMNITRANS METRO FACILITY**  
**1700 WEST 5TH STREET**  
**SAN BERNARDINO, CA 92411**

The meeting facility is accessible to persons with disabilities. If assistive listening devices or other auxiliary aids or Limited English Proficiency services are needed in order to participate in the public meeting, requests should be made through the Recording Secretary at least three (3) business days prior to the Committee Meeting. The Recording Secretary’s telephone number is 909-379-7110 (voice) or 909-384-9351 (TTY), located at 1700 West Fifth Street, San Bernardino, California. If you have comments about items on the agenda or other general concerns and are not able to attend the meeting, please mail them to Omnitrans at 1700 West Fifth Street, San Bernardino, California, Attention Board Secretary. Comments may also be submitted by email to [BoardSecretary@omnitrans.org](mailto:BoardSecretary@omnitrans.org).

**A. CALL TO ORDER**

1. Pledge of Allegiance
2. Roll Call

**B. ANNOUNCEMENTS/PRESENTATIONS**

1. Next Committee Meeting: Thursday, November 9, 2017, 8:00 a.m.  
Omnitrans Metro Facility Board Room

**C. COMMUNICATIONS FROM THE PUBLIC**

This is the time and place for the general public to address the Board for items that are not on the agenda. In accordance with rules applicable to meetings of the Administrative & Finance Committee, comments on items not on the agenda and on items on the agenda are to be limited to a total of three (3) minutes per individual.

**D. POSSIBLE CONFLICT OF INTEREST ISSUES**

Disclosure – Note agenda items contractors, subcontractors and agents, which may require member abstentions due to conflict of interest and financial interests. Board Member abstentions shall be stated under this item for recordation in the appropriate item.

N/A

**E. DISCUSSION ITEMS**

- |  |    |
|--|----|
| 1. Approve Administrative & Finance Committee Minutes – August 10, 2017  | 3  |
| 2. Receive and File Omnitrans; Director of Finance Report on the Price of Compressed Natural Gas – <i>Don Walker</i>   | 7  |
| 3. Recommend the Board of Directors Receive and File Omnitrans’ Fiscal Year Ended June 30, 2017 Financial Audit Statement on Auditing Standards (SAS)114 Letter– <i>Don Walker</i>   | 9  |
| 4. Recommend the Board of Directors Approve the Re-Evaluations of Two Positions and the Revisions to Personnel Policy 402, Salary Ranges; Management Confidential Classifications for Non-Represented Employees – <i>Marge Ewing</i> | 13 |
| 5. Recommend the Board of Directors Approve Personnel Policy Manual Proposed Changes – <i>Marge Ewing</i>  | 85 |
| 6. Recommend the Board of Directors Authorize the CEO/General Manager to Approve FY 18 Operating Budget Adjustment – <i>Marge Ewing</i>  | 99 |



**ADMINISTRATIVE AND FINANCE COMMITTEE**  
**THURSDAY, OCTOBER 12, 2017– 8:00 A.M.**  
**OMNITRANS METRO FACILITY**  
**1700 WEST 5TH STREET**  
**SAN BERNARDINO, CA 92411**

7. Recommend the Board of Directors Authorize the CEO/General Manager to Announce Call for Projects – 2018 Measure I Specialized Transportation Program – <i>Doug Stanley</i> <b>F. ADJOURNMENT</b>	102
--	-----



1700 W. Fifth St.  
San Bernardino, CA 92411  
909-379-7100  
www.omnitrans.org

ITEM #           E1          

**ADMINISTRATIVE & FINANCE COMMITTEE  
MINUTES, AUGUST 10, 2017**

**A. CALL TO ORDER**

Acting Committee Chair Carey Davis called the regular meeting of the Administrative and Finance Committee to order at 8:01 a.m., Thursday, August 10, 2017.

1. Pledge of Allegiance
2. Roll Call

**Committee Members Present**

Council Member David Avila, City of Yucaipa  
Council Member Art Bennett, City of Chino Hills - Alternate  
Council Member Ron Dailey, Loma Linda  
Mayor Carey Davis, City of San Bernardino  
Mayor Paul Eaton, City of Montclair  
Supervisor Curt Hagman, County of San Bernardino  
Council Member John Roberts, City of Fontana  
Mayor Pro Tem Sylvia Robles, City of Grand Terrace  
Mayor Pro Tem Alan Wapner, City of Ontario – Via Teleconference

**Committee Members Absent**

Council Member Patricia Gilbreath, City of Redlands  
Council Member Sam Spagnolo, City of Rancho Cucamonga

**OTHERS ATTENDING**

Haviva Shane, General Counsel

**Omnitrans Administrative Staff Present**

P. Scott Graham, CEO/General Manager  
Trischelle Baysden, Director of Rail  
Samuel Gibbs, Director of Internal Audit Services  
Marge Ewing, Director of Human Resources/Safety & Security  
Jacob Harms, Director of Information Technology  
Eugenia Pinheiro, Interim Director of Procurement  
Doug Stanley, Interim Director Special Transit Services  
Don Walker, Director of Finance  
Wendy Williams, Director of Marketing/Planning  
Omar Bryant, Maintenance Manager  
Maurice Mansion, Treasury Manager  
Kathy McClure, Senior Contract Administrator  
John Steffon, Transportation Manager

Krystal Turner, Contracts Administrator  
Julienne Overland-Villegas, Senior Executive Assistant to the CEO/General Manager

**B. ANNOUNCEMENTS/PRESENTATIONS**

The next Committee Meeting is scheduled Thursday, September 14, 2017, at 8:00 a.m.

**C. COMMUNICATIONS FROM THE PUBLIC**

There were no communications from the public.

**D. POSSIBLE CONFLICT OF INTEREST ISSUES**

There were no conflict of interest issues identified.

**E. DISCUSSION ITEMS**

1. Approve Administrative & Finance Committee Minutes – May 11, 2017

M/S (Avila/Robles) that approved the Committee Minutes of May 11, 2017. Member Bennett abstained. Motion was approved by remaining Members present.

2. Receive and File Director of Finance Report – Price of Compressed Natural Gas

Don Walker, Director of Finance, reported that July is the first month of FY18, and noted that the budget was prepared based on the assumption that pipeline fueling would be in effect. Mr. Walker explained that various issues delayed the project schedule and stated that fueling at West Valley is currently in the “testing phase” and is expected to begin this weekend, and fueling at East Valley is scheduled to begin mid-September.

Mr. Walker explained that the cost of fuel for FY18 was estimated at \$1.9 million, with an average cost of \$158,000 per month. Since the fueling did not begin as projected, the cost for the month of July was \$307,000, which is \$153,000 over budget. He stated that the variance will continue until the pipeline fueling begins. Once the fueling begins, a third-party administrator will sell the Low Carbon Fuel Standard (LCFS) credits, which is expected to generate approximately \$72,000 per month and over \$800,000 annually.

This item was received and filed.

3. Recommend the Board of Directors Review New Policy and Procedures: Electronic Communications

Haviva Shane, General Counsel, presented this item. She provided some background by stating that at the last Executive Committee Meeting held on July 7, 2017, she presented a draft Electronic Communications Policy crafted for Omnitrans, which was developed as the result of the recent California Supreme Court decision in the *City of San Jose v.*

*Superior Court* case. Ms. Shane stated that Committee engaged in a lengthy discussion and requested that the policy be changed to a “procedure” rather than a policy as it relates to public officials. She stated that the changes are included in today’s agenda for the Committee’s review and possible recommendation to the Board of Directors for discussion.

M/S (Eaton/Dailey) that recommended the Electronic Communications Policy and Procedures be forwarded to the Board of Directors for discussion. Motion was unanimous by Members present.

4. Recommend the Board of Directors Authorize the CEO/General Manager to Request a Letter of No Prejudice from the Federal Transit Administration for the Redlands Passenger Rail Project

Supervisor Hagman arrived at 8:23 a.m.

M/S (Dailey/Hagman) that recommended the Board of Directors authorize the CEO/General Manager to request a Letter of No Prejudice (LONP) from the Federal Transit Administration (FTA) regarding the purchase of passenger rail vehicles for the Redlands Passenger Rail Project (RPRP). Motion was unanimous by Members present.

5. Receive and Forward to the Board of Directors Annual Internal Audit Workplan and Schedule FY2018

M/S (Hagman/Dailey) that received and forwarded the Annual Internal Audit Workplan and FY18 Schedule to the Board of Directors for receipt and file.

6. Recommend to the Board of Directors Ratification of Change Order 3 to Contract IFB-IPMO16-98, sbX E Street Corridor Public Address (PA) System

Member Wapner joined the meeting at 8:27 a.m. via teleconference.

M/S (Hagman/Roberts) to Ratify Change Order 3 to Contract IPMO16-98 with Ford Audio-Video Systems, LLC, of Tulsa, OK, for the provision of the purchase and installation of 22 Innovative Electronic Designs (IED) GlobalCom IP100 Controllers, extend the period of performance through September 30, 2017, and increase the contract by \$85,850, plus a ten percent contingency of \$8,585, for a new not-to-exceed amount of \$703,076.92. Motion was unanimous by Members present.

7. Recommend to the Board of Directors Funding Agreement between Community Senior Services and Omnitrans

M/S (Hagman/Robles) that authorized the CEO/General Manager to execute the funding agreement between Omnitrans and Community Senior Services for \$139,898 of FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities federal

funds awarded through San Bernardino County Transportation Authority's (SBCTA) 2017 Call for Projects. Motion was unanimous by Members present.

8. Recommend to the Board of Directors Funding Agreement between OPARC and Omnitrans

M/S (Wapner/Hagman) that authorized the CEO/General Manager to execute the funding agreement between Omnitrans and OPARC for \$307,875 of FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities federal funds awarded through San Bernardino County Transportation Authority's (SBCTA) 2017 Call for Projects. Motion was unanimous by Members present.

9. Recommend to the Board of Directors Funding Agreement between YMCA and Omnitrans

M/S (Hagman/Robles) that authorized the CEO/General Manager to execute the funding agreement between Omnitrans and YMCA for \$73,000 of FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities federal funds awarded through San Bernardino County Transportation Authority's (SBCTA) 2017 Call for Projects. Motion was unanimous by Members present.

#### **F. ADJOURNMENT**

The Administrative and Finance Committee meeting adjourned at 8:43 a.m.

The next Administrative and Finance Committee Meeting is scheduled Thursday, September 14, 2017, at 8:00 a.m., with location posted on the Omnitrans website and at Omnitrans' San Bernardino Metro Facility.

Prepared by:

---

Araceli Barajas, Executive Staff Assistant

ITEM #           E2          

**DATE:** October 12, 2017

**TO:** Committee Chair Sam Spagnolo and  
Members of the Administrative and Finance Committee

**THROUGH:** P. Scott Graham, CEO/General Manager

**FROM:** Don Walker, Director of Finance

**SUBJECT: OMNITRANS' DIRECTOR OF FINANCE REPORT ON THE PRICE OF COMPRESSED NATURAL GAS (CNG)**

**FORM MOTION**

Receive and file the Director of Finance's update on the price of compressed natural gas. Both the East and West Valley pipeline fueling stations are completed and operational.

**BACKGROUND**

The goal of Strategic Initiative -1 in the Management Plan for FY16 was to develop and implement a Comprehensive Fuel Cost Reduction Plan. The two (2) components were:

1. Install pipeline gas fueling infrastructure at East Valley, West Valley, and I Street facilities.
2. Commence phasing in of CNG Paratransit vehicles.

The pipeline gas fueling infrastructure was completed in August 2017 at West Valley, and September 2017 at East Valley.

Omnitrans has received one (1) invoice for gas since completion of the pipeline gas fueling infrastructure at West Valley. The invoice represents fuel cost using pipeline gas for twenty (20) days. The transmission charge from SoCal Gas was also received. The table below gives a comparison of the per gallon cost for LCNG and pipeline gas. It is important to note that it takes 1.6 gallons of LCNG to make one (1) GGE. On the other hand, it takes 1.14 therms to make one (1) GGE.

	<u>ALT (LCNG)</u>	<u>GHI Energy (Pipeline)</u>
Gasoline Gallon Equivalent (GGE)	\$0.384	\$0.362
Delivery Charge/Liquefaction (GGE)	\$0.736	
Transmission Charge (GGE)		\$0.191
Sales tax (GGE)	\$0.090	
Taxes & Fees (GGE)		\$0.007
<b>Total</b>	<b><u>\$1.210</u></b>	<b><u>\$0.560</u></b>

Based on an annual usage of three (3) million gallons, the switch from LCNG to CNG, and the elimination of delivery charges, the annual savings in fuel cost is estimated at \$1.9 million dollars.

PSG:DW

ITEM #           E3          

**DATE:** October 12, 2017

**TO:** Committee Chair Sam Spagnolo and  
Members of the Administrative and Finance Committee

**THROUGH:** P. Scott Graham, CEO/General Manager

**FROM:** Donald Walker, Director of Finance

**SUBJECT: OMNITRANS' FISCAL YEAR ENDED JUNE 30, 2017 FINANCIAL  
AUDIT STATEMENT ON AUDITING STANDARDS (SAS) 114 LETTER**

**FORM MOTION**

Receive and forward to the Board of Directors to receive and file Vavrinek, Trine, Day & Co., LLP (VTD) SAS 114 letter for fiscal year ended June 30, 2017.

**BACKGROUND**

As a recipient of federal, state, and local funding, Omnitrans is required to have an annual audit conducted by independent auditors in accordance with auditing standards generally accepted in the United States and the standards applicable to financial audits contained in Government Auditing Standards. The audit also included fifteen (15) tasks contained in San Bernardino County Transportation Authority (SBCTA) Transportation Development Act 2005 Compliance Guide.

The SAS 114 letter is an AICPA (American Institute of CPAs) required communication letter for all financial statement audits. The purpose of the letter is to communicate to those charged with governance, such as the Board of Directors, Audit Committee, President, or Management, the scope of audit procedures performed, significant findings, and other information, such as disagreements with management, audit adjustments and significant estimates, that are not communicated in the audited financial statements.

In short, it is the responsibility of VTD to express an opinion about whether the financial statements prepared by management with the Administrative and Finance Committee oversight are fairly presented, in all material respects, and is in conformity with Generally Accepted Accounting Standards.

The audit includes obtaining an understanding of Omnitrans and its environment, including internal control, and risk of material misstatements. Material misstatements may result from:

1. Errors
2. Fraudulent financial reporting
3. Misappropriation of assets
4. Violation of laws or governmental regulations

If any member of the Administrative and Finance Committee or the Board of Directors is aware of matters that have a material bearing on the financial statements taken as a whole (such as those listed above in items 1 – 4), please contact Roger Alfaro at (909) 466-4410 or email at [ralfaro@vtdepa.com](mailto:ralfaro@vtdepa.com).

PSG:DW

Attachments: VTD's SAS 114 Letter



September 7, 2017

To the Board of Directors  
Omnitrans  
San Bernardino, California

We are engaged to audit the financial statements of Omnitrans for the year ended June 30, 2017. Professional standards require that we provide you with the following information related to our audit. We would also appreciate the opportunity to meet with you to discuss this information further since a two-way dialogue can provide valuable information for the audit process.

Our Responsibilities under U.S. Generally Accepted Auditing Standards, Government Auditing Standards and the Uniform Guidance

As stated in our engagement letter dated April 14, 2017, our responsibility, as described by professional standards, is to express an opinion about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles. Our audit of the financial statements does not relieve you or management of your responsibilities.

In planning and performing our audit, we will consider Omnitrans' internal control over financial reporting in order to determine our auditing procedures for the purpose of expressing our opinions on the financial statements and not to provide assurance on the internal control over financial reporting. We will also consider internal control over compliance with requirements that could have a direct and material effect on a major federal program in order to determine our auditing procedures for the purpose of expressing our opinion on compliance and to test and report on internal control over compliance in accordance with the Uniform Guidance.

As part of obtaining reasonable assurance about whether Omnitrans' financial statements are free of material misstatement, we will perform tests of its compliance with certain provisions of laws, regulations, contracts, and grants. However, providing an opinion on compliance with those provisions is not an objective of our audit. Also in accordance with the Uniform Guidance, we will examine, on a test basis, evidence about Omnitrans' compliance with the types of compliance requirements described in the U.S. Office of Management and Budget (OMB) Compliance Supplement applicable to each of its major federal programs for the purpose of expressing an opinion on Omnitrans' compliance with those requirements. While our audit will provide a reasonable basis for our opinion, it will not provide a legal determination on Omnitrans' compliance with those requirements.

Generally accepted accounting principles provide for certain required supplementary information (RSI) to supplement the basic financial statements. Our responsibility with respect to 1) Management's Discussion and Analysis, 2) Schedule of Changes in the Net Pension Liability and Related Ratios, and 3) Schedule of Contributions, which supplement the basic financial statements, is to apply certain limited procedures in accordance with generally accepted auditing standards. However, the RSI will not be audited and, because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance, we will not express an opinion or provide any assurance on the RSI.

We have been engaged to report on the Schedule of Expenditures of Federal Awards and Schedule of Proposition 1B Unspent Funds and Cash Disbursements, which accompany the financial statements but are not RSI. Our responsibility for this supplementary information, as described by professional standards, is to evaluate the presentation of the supplementary information in relation to the financial statements as a whole and to report on whether the supplementary information is fairly stated, in all material respects, in relation to the financial statements as a whole.

We have not been engaged to report on the introductory section or the statistical section, which accompany the financial statements but are not RSI. Our responsibility with respect to this other information in documents containing the audited financial statements and auditor's report does not extend beyond the financial information identified in the report. We have no responsibility for determining whether this other information is properly stated. This other information will not be audited and we will not express an opinion or provide any assurance on it.

Planned Scope, Timing of the Audit, and Other

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.

Our audit will include obtaining an understanding of the entity 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. Material misstatements may result from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity. We will generally communicate our significant findings at the conclusion of the audit. However, some matters could be communicated sooner, particularly if significant difficulties are encountered during the audit where assistance is needed to overcome the difficulties or if the difficulties may lead to a modified opinion. We will also communicate any internal control related matters that are required to be communicated under professional standards.

If any member of the Board is aware of matters that have a material bearing on the financial statements taken as whole (such as those described in items 1-4), please contact me at (909) 466-4410 or by email at ralfaro@vtdcpa.com by September 27, 2017.

We began our audit in May 2017 and expect to issue our report in December 2017. Roger Alfaro is the engagement partner and is responsible for supervising the engagement and signing the report or authorizing another individual to sign it.

This information is intended solely for the use of the Board of Directors and management of Omnitrans and is not intended to be, and should not be, used by anyone other than these specified parties.

Very truly yours,



Roger E. Alfaro, Partner  
Of Vavrinek, Trine, Day & Co., LLP

RA:gbl

ITEM #           E4          

**DATE:** October 12, 2017

**TO:** Committee Chair Sam Spagnolo and  
Members of the Administrative and Finance Committee

**THROUGH:** P. Scott Graham, CEO/General Manager

**FROM:** Marjorie Ewing, Director of Human Resources & Safety Regulatory Compliance

**SUBJECT: RE-EVALUATIONS OF TWO POSITIONS - THE CLIENT RELATIONS  
COORDINATOR & TRAVEL TRAINER AND REVISIONS TO POLICY  
402 SALARY RANGES, MANAGEMENT CONFIDENTIAL  
CLASSIFICATIONS FOR NON-REPRESENTED EMPLOYEES.**

**FORM MOTION**

Motion #1 - Recommend the Board of Directors approve the re-evaluation of the Client Relations Coordinator and the Travel Trainer positions, from a level 9 to a level 8, bringing four (4) of the five (5) incumbents to the minimum of the Level VIII range effective November 1, 2017. The cost to the FY18 budget would be \$15,661, for the increases to the wage and benefits.

Motion #2 - Recommend the Board of Directors approve the proposed revision to Personnel Policy 402, Salary Ranges, Management Confidential Classifications for non-represented employees for Motion 1 above.

**BACKGROUND**

Motion #1 - The Special Transportation Services Department (former V-Trans) was incorporated into Omnitrans in May 2016 and is completing its first eighteen months. During this time we have transitioned the positions and shifted duties and responsibilities. We have completed the Position Information Questionnaire for the Client Relations Coordinator and Travel Trainer and analyzed the increased duties in the areas of planning responsibilities and complexity and decision making having resulted in the need to elevate the position from a level IX to a level VIII. The Position Information Questionnaire and Job Description indicating the job duties and responsibilities that have changed are attached. The adjustments proposed are representative of the essential duties required today for the positions.

Motion #2 - The proposed changes for Policy 402 Salary Ranges, Management Confidential Classifications for non-represented employees includes the Motion 1 re-evaluated positions. The

IPMO section of the policy is redlined as the Department has been closed down and positions are no longer required by the FTA as the sbX Project closed June 30, 2017. Other changes under the CEO's authority are included in the policy revision.

**FUNDING SOURCE**

Motion #1 - The increased annual cost of \$15,661 associated with this action is included in the FY18 salary and benefit budget line items in the Special Transportation Services Department.

Department: 3000  
Account: Various

\_\_\_\_\_ Verification of Funding Source and Availability of Funds  
(Verified and initialed by Finance)

Motion #2 - No cost associated in the proposed changes for Policy 402 Salary Ranges, Management Confidential Classifications for non-represented employees.

**CONCLUSION**

With the Committee's recommendation, these items will be forwarded to the Board of Directors for adoption. Approval of this agenda item supports the FY2017-2020 Omnitrans Strategic Plan.

PSG: ME

**OMNITRANS  
Position Description**

**Job Title:** Client Relations Coordinator – Special Transportation Services  
**Department:** Special Transportation Services  
**Reports To:** Programs Administrator - Special Transportation Services  
**FLSA Status:** Non-Exempt; Level 9 8  
**Approved By:** BOD  
**Approved Date:** March 2, 2016  
**Revised:** October 4, 2017

**SUMMARY** Under moderate direction, ~~This position is responsible for~~ assists ~~ing~~ the Programs Administrator in daily activities related to the ~~Ride Taxi~~ and Volunteer Driver programs, including ~~application review and approval~~, data entry, assisting clients over the phone, generating reports, and other duties as necessary.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following. Other duties may be assigned.

~~Provides support in the processing of applications for program eligibility.~~

~~Determines eligibility through a thorough review of the written application and supporting documents with agency and program guidelines, practices and procedures.~~

~~Assists callers with information about transportation programs offered by the agency and partner agencies.~~

Audits, obtains proper program documentation, updates client information, and inputs client data into electronic database.

Electronically process credit/debit card transactions for Ride program participation; Issue Ride Lyft discount codes and load Ride Taxi program debit cards with funds.

Input monthly mileage information into data management system.

Generates reports from the data management system.

~~Assists callers with information about transportation programs offered by the agency and partner agencies~~

Provides technical assistance to clients while communicating patience and understanding

Provides hands on training of how to use Lyft mobile application, taxi debit card and web-based portal.

Delivers presentations throughout the community

Performs other duties as required.

### **SUPERVISORY RESPONSIBILITIES**

This position has no supervisory responsibilities.

### **QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **EDUCATION and/or EXPERIENCE**

High school diploma or general education degree (GED); minimum of 2 years of customer service, nonprofit, administrative or other reliable experience. Experience working with individuals with disabilities and/senior citizens.

### **LANGUAGE SKILLS**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures or governmental regulations. Ability to write reports, business correspondence and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public. Bi-lingual – fluent in Spanish and English required.

### **MATHEMATICAL SKILLS**

Ability to add and subtract two digit numbers and to multiply and divide with 10's and 100's. Ability to perform these operations using units of American money and weight measurement, volume, and distance.

### **COMPUTER SKILLS**

Must be familiar with current business office operating systems, software and programs. Ability to use computers, planning and organizational skills are required.

### **REASONING ABILITY**

Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.

### **OTHER SKILLS AND ABILITIES**

Must possess a valid California driver's license.

### **PHYSICAL DEMANDS**

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

While performing the duties of this job, the employee is frequently required to sit, and talk or hear. The employee is regularly required to stand and walk. The employee is occasionally required to climb or balance, stoop, kneel, crouch or crawl, and reach with hands and arms. The employee must occasionally lift and/or move up to 25 pounds.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally exposed to outside weather conditions. The noise level in the work environment is usually moderate.

OMNITRANS

POSITION INFORMATION QUESTIONNAIRE

EMPLOYEE NAME: \_\_\_\_\_ DATE: 6-14-17

POSITION TITLE: Client Relations Coordinator

OTHER TITLES COMMONLY USED (If no other titles are used, indicate by writing "N/A" in the space below)

N/A

PURPOSE

This questionnaire is designed to gather relevant information about the nature of each job performed in the Company. It is not an evaluation of you or your performance. It gives you the opportunity to explain the significant features of your job by responding to a series of questions. The information you provide will be used to develop a position description and to establish an appropriate and competitive pay range for your job.

We are asking you for this information because you are in the best position to know exactly what you do, how you do it, and what you need to know to perform the work properly.

INSTRUCTIONS

Please read through the entire questionnaire to understand its scope before answering any of the questions. Then, complete each section; please be specific and precise, describing the position as it currently exists according to your duties and responsibilities. Since this questionnaire is used for all types of jobs, some questions will not apply to your position and the work you do. Please read and answer all questions, marking those that do not apply with "N/A" (not applicable). If you need additional space to answer any of the questions, please continue your answers on the back of the appropriate page.

When you have completed the questionnaire, please sign your name in the space provided below. Please forward the completed questionnaire to your supervisor for review.

Completed by  Date 6/14/17

Reviewed by  Date 6/22/17

**SECTION 1: -- WORK HISTORY**

Please answer each of the following questions.

1. WHAT IS THE NAME OF THE DEPARTMENT IN WHICH YOU WORK?

Special Transit Services

---

2. WHAT IS THE LENGTH OF TIME YOU HAVE BEEN WITH THE ORGANIZATION?

YEARS: 1

MONTHS: 1

3. WHAT IS THE LENGTH OF TIME YOU HAVE BEEN IN YOUR PRESENT POSITION?

YEARS: 1

MONTHS: 1

4. WHAT TWO PREVIOUS POSITIONS HAVE YOU HELD WITHIN THE ORGANIZATION, IF ANY, AND WHAT WAS THE LENGTH OF TIME YOU HELD EACH (please list the last/most recent position first)?

TITLE: \_\_\_\_\_ YEARS: \_\_\_\_\_

TITLE: \_\_\_\_\_ YEARS: \_\_\_\_\_

5. WHAT IS YOUR SUPERVISOR'S NAME: Kimberly Perez

6. WHAT IS YOUR SUPERVISOR'S TITLE: Programs Administrator

**SECTION 2: -- JOB PURPOSE, DUTIES AND RESPONSIBILITIES**

1. STATE BRIEFLY (in one or two sentences) THE PRIMARY PURPOSE OF YOUR JOB AS IT HAS BEEN DESCRIBED TO YOU, OR AS YOU UNDERSTAND IT.

The main purpose of the Client Relations Coordinator is to provide support to the Programs Administrator in the Reimbursement Program, Lyft and Taxi Voucher by compiling monthly mileage forms and submitting them into the Data Management System, assisting walk-ins, evaluating <sup>AND APPROVING</sup> applications, making money transactions for the Ride Program, training for the Lyft program, and maintaining current records for all clients including bank accounts, credit/debit card numbers, and medical records. The position requires for proper evaluation of each applicant's needs and abilities, explain the ADA eligibility standards, and communicate with clients about all Special Transit Services programs to determine the program that most suits their needs.

2. ON THE NEXT PAGE STATE BRIEFLY, CLEARLY, AND CONCISELY THE THINGS THAT YOU DO ON YOUR JOB. BEGIN WITH THOSE REGULAR DUTIES THAT NORMALLY TAKE MOST OF YOUR TIME AND/OR THAT YOU CONSIDER TO BE MOST IMPORTANT. IN THE COLUMN ON THE RIGHT, INDICATE THE APPROXIMATE PERCENT OF YOUR TOTAL WEEKLY TIME SPENT PERFORMING EACH DUTY.

Use simple, non-technical words to describe your work. You should find it helpful to begin each statement of your duties with a verb descriptive of the kind of action you are required to take. Some of the verbs commonly used are listed below:

administer	arrange	check
advise	allocate	assemble
operate	originate	post
review	transfer	distribute
analyze	audit	coordinate
approve	calculate	control
compile	formulate	promote
compute	initiate	purchase
counsel	payout	recommend
design	maintain	regulate
develop	make	schedule
direct	meet	set up
establish	negotiate	specify
examine	organize	supervise
expedite	plan	type
file	prepare	verify
write	tabulate	monitor

Select the proper verb carefully. Be sure that the words you use mean exactly what you intend them to mean - for example: "type a report," "write a report," "add figures," "negotiate contracts," "approve contracts," "meet with vendors," etc.

**SECTION 2: - JOB PURPOSE, DUTIES AND RESPONSIBILITIES (continued)**

	Responsibilities	Percent of Time Per Week
A	Submit monthly mileage forms into Data Management System	40%
B	Evaluate applications for Reimbursement Program, Taxi Voucher, and Lyft Program and make an eligibility determination	10%
C	Charge/process credit cards for Ride Programs	10%
D	Prepare applicant correspondence regarding their eligibility status	5%
E	Respond to applicant telephone inquiries regarding programs such as TREP, Taxi Voucher, Lyft and occasionally Travel Training and Access	20%
F	Organize and maintain client files	5%
G	Participate in community outreach (fairs and presentations)	5%
H	Other (carry out trainings for Lyft Program, etc.)	5%

FULL TIME TOTAL PERCENT 100%

**SECTION 2: -- JOB PURPOSE, DUTIES AND RESPONSIBILITIES (continued)**

3. BRIEFLY GIVE TWO (2) EXAMPLES OF THE MOST DIFFICULT TYPES OF PROBLEMS YOU FACE IN YOUR WORK:
- There are Lyft program applicants that are visually impaired whom are not familiar with navigating their smartphones. When training, the Client Relations Coordinator may be required to provide additional instruction on the basic smartphone functions while using the VoiceOver feature. Trainings for the visually impaired require repetition over the course of a couple of days so the coordinator must exhibit empathy and patience at all times during the trainings. The coordinator must have full understanding of the Lyft app, the VoiceOver feature in smartphones, and must be able to improvise to resolve the situation.
  - The Client Relations Coordinator must resolve issues that arise between participants and cab companies when using the Taxi Voucher program. The coordinator must find solutions to ensure that the client obtains a ride back home when their ride is taking a long time. Also any time the cab's system is malfunctioning, it is the coordinator's responsibility to redeem the cost of the fare by charging the client's voucher card instead before the client bears any additional costs.
4. LIST THE ASPECTS OF YOUR JOB, IF ANY, THAT ARE CONSIDERED CONFIDENTIAL OR SENSITIVE IN NATURE:
- Knowledge of each client's medical conditions and disabilities
  - Knowledge of doctors, family, and other addresses client normally travels to
  - Database system contains medical conditions for all participants
  - Access to medical records when performing audits. Must adhere to HIPAA regulations.
  - Access to all TREP Program participant's bank accounts
  - Access to all Ride Program participant's credit and debit card numbers
  - Access to Chase Paymentech iTerminal account (used to process payments)
  - Occasional access to client's social security numbers and I.D.s
  - Access to all Lyft codes which contain a \$80 value per code

**SECTION 3: - EDUCATION AND EXPERIENCE**

1. WHAT IS THE MINIMUM LEVEL OF EDUCATION REQUIRED BY SOMEONE TO PERFORM YOUR JOB SATISFACTORILY? PLEASE CHECK ONLY ONE ITEM.

\_\_\_\_\_ No formal education is necessary

\_\_\_\_\_ High school diploma

X  Training beyond high school in a special trade or field

\_\_\_\_\_ A two-year college degree (AA or AS) in \_\_\_\_\_

\_\_\_\_\_ Professional level of knowledge in a field (usually equivalent to a four-year college degree) in:

\_\_\_\_\_ Post-graduate training or an advanced degree field: \_\_\_\_\_ degree

2. PLEASE LIST ANY SPECIALIZED SKILLS, TRAINING, COURSE WORK, SEMINARS OR CERTIFICATE PROGRAMS REQUIRED TO PERFORM THIS JOB:  
**NTI Managing Community Mobility**

**Desirable:**

- **Bilingual in English and Spanish**
- **Relevant college coursework in Psychology and Human Services**
- **Experience working with seniors and/or people with disabilities**
- **Experience working with social services or nonprofits**
- **Experience in customer service**

3. WHAT TYPES OF EQUIPMENT, MACHINERY, OR TOOLS, IF ANY, MUST YOU USE IN THE PERFORMANCE OF YOUR JOB DUTIES?

**Must be competent in the use of a computer, scanner, and fax. Must be familiar with cellphone functionalities (Lyft service and Voice Over feature) and Badgy Printer to generate taxi cards.**

4. EXPERIENCE REQUIREMENTS:

- A. PLEASE LIST THE MINIMUM TYPES AND LENGTH OF WORK EXPERIENCE REQUIRED BEFORE A PERSON CAN PERFORM YOUR JOB:

Type of Experience	Length of Time
<b>Standard office procedures: data entry, phone skills mobile technology (for Lyft program), Microsoft Office, etc.</b>	<u>1</u>
<b>Customer Service</b>	<u>1</u>
<b>Experience working with seniors &amp; persons with disabilities</b>	<u>2</u>
Total Work Experience:	<u>4 years</u>

) 1  
1  
2

B. WHAT IS THE LENGTH OF THE TRAINING PERIOD REQUIRED FOR A NEW EMPLOYEE ON YOUR JOB TO BECOME FULLY FUNCTIONAL IF HE/SHE POSSESSES THE QUALIFICATIONS YOU HAVE LISTED ABOVE?

1-2 years

6 months <sup>D</sup>

C. IF RECRUITING FOR THIS POSITION, IN WHAT INDUSTRIES WOULD YOU LOOK?

Transportation, Human Services, Non-Profits, Social Services

D. IF RECRUITING FOR THIS POSITION, WHAT MIGHT BE THE CANDIDATE'S CURRENT JOB TITLE?

Human Services Program Coordinator

**SECTION 4: - SUPERVISORY RESPONSIBILITIES**

1. THE FOLLOWING THREE STATEMENTS DESCRIBE LEVELS OF SUPERVISORY RESPONSIBILITY. CHECK THE ONE THAT BEST DESCRIBES YOUR JOB.

- I do not manage the work of others.  
 I provide work direction to others, but do not have direct performance appraisal responsibility for them.  
 I have full supervisory responsibility for others, including performance appraisal and delegated authority to hire, fire, and approve salary actions.

I have this responsibility for:

- non-management employees only,  
 management or professional employees only, or  
 both non-management and management employees.

2. IF YOU DIRECTLY SUPERVISE OTHER EMPLOYEES, INDICATE THE TITLE(S) OF THE POSITION(S) SUPERVISED AND, FOLLOWING THE TITLE, THE NUMBER OF EMPLOYEES ASSIGNED TO THE POSITION(S). IF YOU DO NOT SUPERVISE ANYONE DIRECTLY, PLEASE MARK "N/A".

TITLES(S)	NUMBER OF PEOPLE
_____	_____
_____	_____
_____	_____
_____	_____

3. IF YOU INDIRECTLY SUPERVISE OTHERS (that is, if you have people report to you through someone else who then reports to you directly), INDICATE THE TITLE(S) OF THE POSITION(S) INDIRECTLY SUPERVISED AND, FOLLOWING THE TITLE(S), THE NUMBER OF EMPLOYEES ASSIGNED TO EACH POSITION.

TITLE (S)	NUMBER OF PEOPLE
_____	_____
_____	_____
_____	_____

**SECTION 5: - ORGANIZATIONAL CONTACTS**

1. LIST THE TITLES OF PEOPLE WITHIN THE COMPANY THAT YOU MUST WORK WITH TO DO YOUR JOB. IN ADDITION, PLEASE LIST THE REASON FOR THESE CONTACTS AND THE FREQUENCY OF THESE CONTACTS (FOR EXAMPLE, YOU MAY SPEAK WITH A PAYROLL CLERK ONCE PER WEEK TO RELAY INFORMATION ABOUT NEW HIRES).

Title	Reason for Contact	How Often?
<u>Travel Trainer</u>	<u>Assess possibility of client's participation in the program</u>	<u>Daily</u>
<u>Paratransit Eligibility Technician</u>	<u>Assess possibility of client's participation in the program</u>	<u>Daily</u>
<u>Information Clerk (Access)</u>	<u>Misdirected customers</u>	<u>Daily</u>
<u>Administrative Assistant</u>	<u>Ride program charges</u>	<u>Daily</u>
<u>Purchased Transportation Administrator</u>	<u>Concerns related to paratransit service</u>	<u>Daily</u>
<u>PROGRAM ADMINISTRATOR</u>	<u>Guidance</u>	<u>Daily</u>

2. LIST THE TITLES OF PEOPLE OUTSIDE THE COMPANY THAT YOU MUST WORK WITH TO DO YOUR JOB (e.g., vendors, bankers, service companies, etc.). ALSO LIST THE NAME OF THE ORGANIZATION THEY WORK FOR, THE REASON YOU HAVE CONTACT WITH THEM, AND THE FREQUENCY WITH WHICH YOU INTERACT WITH THEM.

Title	Organization	Reason for Contact	How Often?
	<u>Senior Centers</u>	<u>Community outreach</u>	<u>Monthly</u>
	<u>Senior Housing Living Facilities</u>	<u>Community outreach</u>	<u>Monthly</u>
<u>Client Relations Coordinator</u>	<u>Community Senior Services</u>	<u>Client referrals</u>	<u>Monthly</u>
	<u>Department of Aging and Adult Services</u>	<u>Referrals and outreach</u>	<u>Monthly</u>
<u>Dispatcher</u>	<u>Yellow Cab</u>	<u>Resolve complaints</u>	<u>Monthly</u>
<u>Dispatcher</u>	<u>Bell Cab</u>	<u>Resolve complaints</u>	<u>Monthly</u>
<u>Executive Director &amp; trainer</u>	<u>Lighthouse for the Blind</u>	<u>Lyft Program training</u>	<u>Monthly</u>

**SECTION 5: - ORGANIZATIONAL CONTACTS (continued)**

THIS ITEM ALSO PERTAINS TO THE INTERPERSONAL CONTACTS WHICH YOU MUST MAINTAIN WITH OTHER EMPLOYEES, VENDORS, EXECUTIVES OF THE COMPANY AND/OR OUTSIDE INDIVIDUALS OF VARIOUS TYPES IN YOUR NORMAL DAILY WORK. CHECK THE STATEMENT THAT MOST ACCURATELY REFLECTS THE TYPE OF CONTACTS YOU NORMALLY HAVE.

- \_\_\_\_\_ The personal contacts I have during a normal workday are with my immediate associates in my section and generally deal with matters of a routine nature. My contacts require ordinary courtesy to avoid friction in relationships.
- \_\_\_\_\_ The personal contacts I have are generally of a routine nature in one or several other sections, departments, or divisions, or they require close collaboration with other members of the same section, department, or division.
- \_\_\_\_\_ The personal contacts I have involve telephone or written communication with individuals primarily inside, but occasionally outside, the Company and may involve answering routine inquiries or discussion of non-controversial matters.
- X  \_\_\_\_\_ The personal contacts I have involve frequent telephone or written communication with individuals outside the Company in administrative positions and may involve answering routine inquiries or discussion of non-controversial matters.
- \_\_\_\_\_ The personal contacts I have involve frequent personal contact with individuals in management or executive positions, wherein I present information and recommendations. I (may) also answer outsiders' requests for nonroutine information requiring tact in presentation.
- \_\_\_\_\_ My personal contacts are of considerable importance inside and outside the Company wherein failure to exercise judgment or diplomacy may result in losses to the Company.
- \_\_\_\_\_ I have regular contact with the Board of Directors of the Company.

**SECTION 6: - PLANNING**

EACH OF THE FOLLOWING STATEMENTS DESCRIBES ONE OPTION IN A RANGE OF OPTIONS CONCERNING THE SCOPE OF THE PLANNING ACTIVITIES THAT A PERSON DOES AS PART OF HIS/HER JOB. PLEASE CHECK THE ONE STATEMENT THAT BEST DESCRIBES YOUR PLANNING RESPONSIBILITIES.

\_\_\_\_\_ I do not do any planning.

  X   I plan my own work load.

\_\_\_\_\_ I plan my own work load and the work of one or more people in my work group.

\_\_\_\_\_ I plan the work for the entire department.

\_\_\_\_\_ I plan the work for two or more departments.

\_\_\_\_\_ I plan the work for the entire region.

\_\_\_\_\_ I plan the work for the entire organization.

**SECTION 6: - PLANNING (CONTINUED)**

If you do some form of planning, please identify the timespan of your planning activities.

- I only plan my work on a day to day basis.
- I plan on a weekly basis.
- I plan on a monthly basis.
- I plan projects with a month to six month timespan.
- I plan projects with a six month to one year timespan.
- I plan for annual budgets and up to 2 years in advance.
- I am involved in strategic planning for the organization and plan on a 3 to 5 year basis.

## SECTION 7: -SKILLS AND ABILITIES

Please check the statement that most closely matches the skills and abilities required for the position.

### LANGUAGE SKILLS

- \_\_\_\_\_ Ability to read a limited number of two- and three-syllable words and to recognize similarities and differences between words and between series of numbers. Ability to print and speak simple sentences.
- \_\_\_\_\_ Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to customers, clients, and other employees of the organization.
- \_\_\_\_\_ Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of the organization.
- X   Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.
- \_\_\_\_\_ Ability to read, analyze, and interpret common scientific and technical journals, financial reports, and legal documents. Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community. Ability to write speeches and articles for publication that conform to prescribed style and format. Ability to effectively present information to top management, public groups, and/or boards of directors.
- \_\_\_\_\_ Ability to read, analyze, and interpret the most complex documents. Ability to respond effectively to the most sensitive inquiries or complaints. Ability to write speeches and articles using original or innovative techniques or style. Ability to make effective and persuasive speeches and presentations on controversial or complex topics to top management, public groups, and/or boards of directors.

## SECTION 7: - -SKILIS AND ABILITIES (continued)

### MATHEMATICAL ABILITY

- \_\_\_\_\_ Ability to add and subtract two digit numbers and to multiply and divide with 10's and 100's. Ability to perform these operations using units of American money and weight measurement, volume, and distance.
- X   Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.
- \_\_\_\_\_ Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.
- \_\_\_\_\_ Ability to work with mathematical concepts such as probability and statistical inference, and fundamentals of plane and solid geometry and trigonometry. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

### REASONING ABILITY

- \_\_\_\_\_ Ability to apply common sense understanding to carry out simple one- or two-step instructions. Ability to deal with standardized situations with only occasional or no variables.
- \_\_\_\_\_ Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.
- \_\_\_\_\_ Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.
- X   Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.
- \_\_\_\_\_ Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

**SECTION 8: - ACCOUNTABILITY**

EACH OF THE FOLLOWING STATEMENTS DESCRIBES ONE OPTION IN A RANGE OF POSSIBILITIES CONCERNING THE TYPE OF SUPERVISION AND GUIDANCE A PERSON RECEIVES AS PART OF HIS/HER JOB. PLEASE CHECK THE ONE STATEMENT THAT BEST DESCRIBES THE KIND OF SUPERVISION YOU RECEIVE.

- \_\_\_\_\_ I am constantly supervised; I make no decisions independently and work according to procedure.
- \_\_\_\_\_ I am closely supervised; I have very little flexibility in the methods I use or in assigning priorities to my tasks.
- \_\_\_\_\_ I am frequently supervised; My activities are governed by well established rules and procedures and are periodically monitored; some flexibility to determine method or scheduling.
- X   I am generally managed; My activities are governed by general department and of company rules and procedures or schedules and are sometimes monitored; moderate flexibility to determine method, high flexibility to determine scheduling.
- \_\_\_\_\_ I have occasional oversight; My activities are governed by general organizational roles and procedures, I have considerable autonomy within established timeframes.
- \_\_\_\_\_ I work independently on a major function, guided by company policies. I exercise a high degree of initiative involving major programs and commitment. My work is monitored by exception and management information reports. I am almost autonomous in my work.
- \_\_\_\_\_ My work is entirely self-directed; I answer only to the Board of Directors.

**SECTION 9: - DECISION-MAKING, COMPLEXITY AND PROBLEM-SOLVING**

1. EACH OF THE FOLLOWING STATEMENTS DESCRIBES ONE POSITION IN A RANGE OF POSITIONS CONCERNING THE VARIETY OF WORK DONE WITHIN A JOB. PLEASE PUT A CHECK MARK IN FRONT OF THE ONE STATEMENT THAT MOST CLOSELY DESCRIBES THE VARIETY OF TASKS THAT ARE NORMALLY A PART OF YOUR JOB.

\_\_\_\_\_ I perform routine and generally repetitive duties involving little or no variety. I follow simple and easily understood procedures that do not require independent judgment and analysis.

\_\_\_\_\_ I work on a limited variety of routine tasks which are relatively simple tasks of a clerical or manual nature; I may make minor decisions involving accuracy, quality, method of operation or set-ups.

X I work on a wide variety of routine tasks that involve some choice of action within limits.

X I work on diversified tasks that involve a wide range of complex but standardized procedures, semi-routine duties may involve solving frequent problems. I work according to assigned objectives and may work independently on special projects.

\_\_\_\_\_ I work on non-routine tasks within general procedures or guidelines, and that involve the analysis and solution of complex problems based on facts, within broad policies and objective guidelines.

\_\_\_\_\_ I do specialized or technical work with unclear guidelines. My work is analytical and involved, and requires judgment where policies and methods are not well established, problem solving requires innovation, ingenuity, planning, and coordination of effort.

\_\_\_\_\_ I do creative work of a research or development nature with few precedents or examples.

**SECTION 9:- DECISION-MAKING, COMPLEXITY, AND PROBLEM-SOLVING**  
**(Continued)**

2. EACH OF THE FOLLOWING STATEMENTS CONCERNS THE VARIETY OF DECISION-MAKING LATITUDE A PERSON CAN HAVE IN A JOB. PLEASE PUT A CHECK MARK IN FRONT OF THE ONE STATEMENT THAT MOST CLOSELY DESCRIBES THE DECISION-MAKING LATITUDE THAT IS NORMALLY A PART OF YOUR JOB.

\_\_\_\_\_ Position duties involve little or no decision making activities.

\_\_\_\_\_ Position duties involve providing counsel and information used in the decision making process, but do not involve making decisions or recommendations.

\_\_\_\_\_ Position duties involve providing counsel and information, and also involve making some recommendations.

\_\_\_\_\_ Position duties involve making some decisions and making many recommendations.

  X   Position duties involve making frequent decisions and frequent recommendations. I make decisions and take actions that are later subject to review.

\_\_\_\_\_ Position duties involve making constant decisions and providing the authorization of recommended courses of action.

\_\_\_\_\_ Position duties involve decision making having international impact on the Company. I make decisions and take actions independently without anyone's review.

**SECTION 10: - IMPACT OF ERRORS**

CHECK THE ONE STATEMENT THAT MOST ACCURATELY DESCRIBES THE POTENTIAL CONSEQUENCES OF THE ERRORS THAT MAY OCCUR IN THE COURSE OF YOUR NORMAL WORK.

\_\_\_\_\_ My errors cause little difficulty or loss of time to correct. Most of my errors are detected through routine checking procedures.

Q  
X

My errors do not result in overall embarrassment to the Company or in monetary losses but (may) waste supplies and require expenditure of time to track and correct.

\_\_\_\_\_ My errors may cause the Company to incur a modest financial loss or may cause modest embarrassment.

X My errors may result in considerable financial loss and/or embarrassment to the Company and may adversely affect some aspect of our business.

\_\_\_\_\_ My errors have serious financial impact and/or may seriously impair achievement of Company goals and commitments.

**SECTION 11: - WORKING CONDITIONS**

How much exposure to the following environmental conditions does this job require? Show the amount of time by checking the appropriate boxes below.

	Amount of time			
	None	Up to 1/3	1/3 to 2/3	2/3 and more
Wet, humid conditions (non -weather)	X			
Work near moving mechanical parts	X			
Work in high, precarious place	X			
Fumes or airborne particles	X			
Toxic or caustic chemicals	X			
Outdoor weather conditions		X		
Extreme cold (non weather)	X			
Extreme heat (non weather)	X			
Risk of electrical shock	X			
Work with explosive	X			
Risk of radiation	X			
Vibration	X			

Subject to outdoor weather conditions during marketing events and Lyft trainings.

How much noise is typical for the work environment of this job? Check the appropriate level below.

- \_\_\_\_\_ Very Quiet (Examples: forest trail, isolation booth for hearing test)
- \_\_\_\_\_ Quiet (Examples: library, private office)
- X   Moderate Noise (Examples: business office with typewriters and/or computer printers, light traffic)
- \_\_\_\_\_ Loud Noise (Examples: metal can manufacturing, department, large earth-moving equipment)
- \_\_\_\_\_ Very Loud Noise (Examples: jack hammer work, front row at rock concert)

**SECTION 12: - PROBABILITY OF INJURY OR ACCIDENT**

Which of the following statements most closely describes the probability of injury or accident in your working environment? Please cite one or two examples if appropriate.

  X  

While performing my normal work activities, there is generally little or no probability of injury or health impairment.

  X  

While performing my normal work activities, accidents are improbable outside of temporary minor injuries such as cuts, bruises or sprains.

      

While performing my normal work activities, I have relatively high exposure to hazards which are likely to produce temporary cuts, bruises or sprains.

      

While performing my normal work activities, I have occasional exposure to serious potential injury or health hazard such as severe burns, fractures or similar disablements.

      

While performing my normal work activities, I am frequently exposed to serious potential injury or health hazard such as severe burns, fractures or similar disablements.

Examples

**Carrying marketing materials to community outreach events.**

**SECTION 13: - PHYSICAL DEMAND**

Please check the box that most accurately describes the amount of time you spend on the following activities.

	Amount of time			
	None	Up to 1/3	1/3 to 2/3	2/3 and more
Stand			X	
Walks			X	
Sit				X
Talk or hear				X
Use hands to finger, handle or feel	X			
Climb or balance		X		
Stoop, kneel, crouch or crawl		X		
Reach with hands and arms		X		
Taste or smell	X			

Does this job require that weight be lifted or force be exerted? If so, how much and how often? Check the appropriate boxes below.

	Amount of time			
	None	Up to 1/3	1/3 to 2/3	2/3 and more
Up to 10 pounds		X		
Up to 25 pounds		X		
Up to 50 pounds	X			
Up to 100 pounds	X			
More than 100 pounds	X			

**EXAMPLES**

---



---



---

**SECTION 14: - VISION REQUIREMENTS**

Does this job have any special vision requirements. Check all that apply.

- My job requires close vision (clear vision at 20 inches or less).
- My job requires distance vision (clear vision at 20 feet or more).
- My job requires color vision (ability to identify and distinguish colors).
- My job requires peripheral vision (ability to observe an area that can seem up or down or to the left and right while eyes are fixed on a given point).
- My job requires depth perception (3- dimensional vision, ability to judge distances and spatial relationships).
- My job requires ability to adjust focus (ability to adjust the eye to bring an object into sharp focus).
- My job requires no special vision requirements.



**OMNITRANS**  
**Position Description**

**Job Title:** Travel Trainer – Special Transportation Services  
**Department:** Special Transportation Services  
**Reports To:** Programs Administrator – Special Transportation Services  
**FLSA Status:** Non-Exempt; Level 9 8  
**Approved By:** BOD  
**Approved Date:** March 2, 2016  
**Revised:**

**SUMMARY** Full-time position responsible for one-on-one training and support services to eligible Travel Training Program participants, and other duties as assigned.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following. Other duties may be assigned.

Provides one-on-one training and support services to elderly and/or physically, developmentally or mentally disabled residents in the safe and proper use of the transit bus system;

Provides home and on the bus training as required;

Provides training and instruction in a variety of areas including bus rules and regulations, appropriate public behavior, street crossing skills, emergency procedures and safety, how to read a bus schedule, landmark identification, bus pass procedures;

Maintains detailed records of trainee progress and prepares required reports as needed;

Conducts and/or participates in program orientation presentation to community groups and organizations to explain program services and operations;

Visits applicants' residence and conducts trainee assessment, explaining mobility training goals and services, assessing individual transportation needs and abilities to include identifying any disabilities which would require special training efforts;

Evaluates assessment information and determines if individuals are eligible for mobility training using well defined eligibility criteria and established procedures;

Plans and develops individualized training schedules for program participants including identification of special needs training;

Develops and maintains contacts with individuals and agencies that make referrals for mobility training;

**Job Title: Travel Trainer**

**Page 2**

**SUPERVISORY RESPONSIBILITIES**

This job has no supervisory responsibilities.

**QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**EDUCATION and/or EXPERIENCE**

High school diploma or general education degree (GED); and one year of related experience and/or training; experience working with individuals with disabilities and/senior citizens.

Knowledge of the local transit system

**LANGUAGE SKILLS**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

**MATHEMATICAL SKILLS**

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

**COMPUTER SKILLS**

Must be familiar with current business office operating systems, software and programs. Ability to use computers, planning and organizational skills are required.

**REASONING ABILITY**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

**OTHER SKILLS AND ABILITIES**

Bi-lingual – highly preferred.

Ability to teach ideas, concepts and skills to the elderly and or disabled effectively.

Ability to work independently and manage time effectively.

Valid California driver's license.

**Job Title: Travel Trainer**

**Page 3**

**PHYSICAL DEMANDS**

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

While performing the duties of this job, the employee is frequently is required to stand, sit, walk, talk or hear, use hands to finger, handle or feel, and to reach with hands and arms. The employee is regularly required to climb or balance. The employee must occasionally lift and/or move up to 10 pounds.

**WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently exposed to outside weather conditions. The noise level in the work environment is usually moderate and occasionally loud.

**OMNITRANS**

**POSITION INFORMATION QUESTIONNAIRE**

EMPLOYEE NAME: **Marcus R. Garcia**

DATE: **05/22/2017**

POSITION TITLE: **STS-Travel Trainer**

OTHER TITLES COMMONLY USED (If no other titles are used, indicate by writing "N/A" in the space below)

**Mobility Trainer**

**PURPOSE**

This questionnaire is designed to gather relevant information about the nature of each job performed in the Company. It is not an evaluation of you or your performance. It gives you the opportunity to explain the significant features of your job by responding to a series of questions. The information you provide will be used to develop a position description and to establish an appropriate and competitive pay range for your job.

We are asking you for this information because you are in the best position to know exactly what you do, how you do it, and what you need to know to perform the work properly.

**INSTRUCTIONS**

Please read through the entire questionnaire to understand its scope before answering any of the questions. Then, complete each section; please be specific and precise, describing the position as it currently exists according to your duties and responsibilities. Since this questionnaire is used for all types of jobs, some questions will not apply to your position and the work you do. Please read and answer all questions, marking those that do not apply with "N/A" (not applicable). If you need additional space to answer any of the questions, please continue your answers on the back of the appropriate page.

When you have completed the questionnaire, please sign your name in the space provided below. Please forward the completed questionnaire to your supervisor for review.

Completed by \_\_\_\_\_ Date \_\_\_\_\_

Reviewed by \_\_\_\_\_ Date \_\_\_\_\_

**SECTION 1: -- WORK HISTORY**

Please answer each of the following questions.

1. WHAT IS THE NAME OF THE DEPARTMENT IN WHICH YOU WORK?

**Special Transportation Services**

2. WHAT IS THE LENGTH OF TIME YOU HAVE BEEN WITH THE ORGANIZATION?

YEARS: **1** MONTHS: **1**

3. WHAT IS THE LENGTH OF TIME YOU HAVE BEEN IN YOUR PRESENT POSITION?

YEARS: **1** MONTHS: **1**

4. WHAT TWO PREVIOUS POSITIONS HAVE YOU HELD WITHIN THE ORGANIZATION, IF ANY, AND WHAT WAS THE LENGTH OF TIME YOU HELD EACH (please list the last/most recent position first)?

TITLE: **N/A** YEARS: \_\_\_\_\_

TITLE: **N/A** YEARS: \_\_\_\_\_

5. WHAT IS YOUR SUPERVISOR'S NAME: **Kimberly Perez**

6. WHAT IS YOUR SUPERVISOR'S TITLE: **Programs Administrator**

**SECTION 2: -- JOB PURPOSE, DUTIES AND RESPONSIBILITIES**

1. STATE BRIEFLY (in one or two sentences) THE PRIMARY PURPOSE OF YOUR JOB AS IT HAS BEEN DESCRIBED TO YOU, OR AS YOU UNDERSTAND IT.

**The purpose of the position of STS-Travel Trainer is to assist individuals with disabilities and seniors with gaining more freedom and independence by learning how to ride the Omnitrans fixed-route system. The position involves working both one-on-one and with groups of clients, reporting performance, and conducting outreach efforts on a continuous basis to recruit new program participants.**

2. ON THE NEXT PAGE STATE BRIEFLY, CLEARLY, AND CONCISELY THE THINGS THAT YOU DO ON YOUR JOB. BEGIN WITH THOSE REGULAR DUTIES THAT NORMALLY TAKE MOST OF YOUR TIME AND/OR THAT YOU CONSIDER TO BE MOST IMPORTANT. IN THE COLUMN ON THE RIGHT, INDICATE THE APPROXIMATE PERCENT OF YOUR TOTAL WEEKLY TIME SPENT PERFORMING EACH DUTY.

Use simple, non-technical words to describe your work. You should find it helpful to begin each statement of your duties with a verb descriptive of the kind of action you are required to take. Some of the verbs commonly used are listed below:

administer	arrange	check
advise	allocate	assemble
operate	originate	post
review	transfer	distribute
analyze	audit	coordinate
approve	calculate	control
compile	formulate	promote
compute	initiate	purchase
counsel	payout	recommend
design	maintain	regulate
develop	make	schedule
direct	meet	set up
establish	negotiate	specify
examine	organize	supervise
expedite	plan	type
file	prepare	verify
write	tabulate	monitor

Select the proper verb carefully. Be sure that the words you use mean exactly what you intend them to mean - for example: "type a report," "write a report," "add figures," "negotiate contracts," "approve contracts," "meet with vendors," etc.

**SECTION 2: - JOB PURPOSE, DUTIES AND RESPONSIBILITIES (continued)**

	Responsibilities	Percent of Time Per Week
a)	Initiate service to waitlist client via phone call to schedule functional assessment; assist with intake of new client referrals into system	10%
b)	Perform functional assessment for prospective client	15%
c)	Plan, organize, and perform one-on-one travel training services	25%
d)	Write daily performance notes and compile final report	10%
e)	Organize and assist with group travel training sessions	10%
f)	Coordinate presentations for coach operators and new client referral streams	10%
g)	Coordinate Travel Training Bus presentations, operate the 40-foot coach required for presentation	5%
h)	Other administrative/support duties (not to exceed 15% of your time)	15%

FULL TIME TOTAL PERCENT     **100%**

## **SECTION 2: -- JOB PURPOSE, DUTIES AND RESPONSIBILITIES (continued)**

3. BRIEFLY GIVE TWO (2) EXAMPLES OF THE MOST DIFFICULT TYPES OF PROBLEMS YOU FACE IN YOUR WORK:

- **Travel trainers may assist an individual with a psychological disability so severe, to the extent that they may experience an anxiety attack or other mental breakdown. Travel trainers must draw from common sense, experience, and their understanding of the unique barriers the individual faces to make their best attempt to resolve the situation.**
- **Travel trainers face a unique challenge in their position in that the work environment itself is not structured. Travel trainers are responsible for traveling by various mode of transportation throughout the entire service area of Omnitrans. Travel trainers are subject to unfavorable weather conditions such as rain, wind, extreme heat, and extreme cold, in environments where shelter from the elements may not be readily available. Travel trainers may be exposed to areas with poor or nonexistent pedestrian infrastructure. As travel trainers may work during all hours of operation of fixed-route service, work may be conducted in the early morning or evening as well. This may include traveling through locations with poor street lighting or visibility. Lastly, travel trainers may travel through communities with higher crime rates to effectively reach all members of the target population.**

4. LIST THE ASPECTS OF YOUR JOB, IF ANY, THAT ARE CONSIDERED CONFIDENTIAL OR SENSITIVE IN NATURE:

- **During the functional assessment, clients can reveal personal information including the following**
  - **Current medications, dosage, purpose, and side effects**
  - **Recent stays at a hospital, extended care facility, or mental institution**
  - **Names, addresses, and phone numbers of medical professionals, case workers, and care providers**
  - **During psychological barrier assessment, previous history of violence or abuse**
- **Final reports contain details regarding client performance during their participation in the travel training program**
  - **Barriers which were encountered because of the limitations experienced by the client, whether physical and/or due to their disability**
  - **Analysis and recommendations for case workers and other stakeholders regarding whether fixed-route transportation is best for a client, or if other alternatives such as paratransit are appropriate**
- **Database with client records contains personal information for each client**
  - **Contact information and emergency contact information**
  - **Medical conditions, symptoms, medications, side effects**
  - **Location of their home stop, daily destination, routes and times of departures to complete their arrival and return trips**
- **Clients may have sensitive backgrounds which need to be considered**

- Abuse/domestic violence: client may request to avoid certain routes, streets, destinations, or times of day
- Anxiety: client may need special accommodations to successfully ride fixed-route transportation, travel trainer may require use of strategies should an anxiety attack occur
- Psychological: history of institutionalization, clients of Department of Behavioral Health
- Criminal background: clients may be in rehabilitation programs when participating in the program

**SECTION 3: - EDUCATION AND EXPERIENCE**

1. WHAT IS THE MINIMUM LEVEL OF EDUCATION REQUIRED BY SOMEONE TO PERFORM YOUR JOB SATISFACTORILY. PLEASE CHECK ONLY ONE ITEM.

\_\_\_\_\_ No formal education is necessary

\_\_\_\_\_ High school diploma

\_\_\_\_\_ Training beyond high school in a special trade or field

**X** A two-year college degree (AA or AS) in **Human Services Management, Business, Psychology, Communication, or Public Administration**

\_\_\_\_\_ Professional level of knowledge in a field (usually equivalent to a four-year college degree) in: \_\_\_\_\_

\_\_\_\_\_ Post-graduate training or an advanced degree field: \_\_\_\_\_ degree

**An individual who holds the position of Travel Trainer should at the very least have an Associates Degree or the equivalent of an Associates Degree, in an area of study such as Human Services Management, Business, Psychology, Communication, or Public Administration. An AA or AS degree ensures that the individual possesses the critical thinking skills required to properly evaluate client performance, develop training strategies, and provide detailed summaries of performance in final reports. An individual who holds this position should have either education or experience that relates to fundamental concepts of human service agencies and the structures of both not-for-profit and public organizations.**

2. PLEASE LIST ANY SPECIALIZED SKILLS, TRAINING, COURSE WORK, SEMINARS OR CERTIFICATE PROGRAMS REQUIRED TO PERFORM THIS JOB: **-Being bilingual in English and Spanish is highly desirable, but not required to perform the duties of the position. The ability to speak any other foreign language is desirable, but not**

**required. Bilingual individuals increase the outreach potential of the program by targeting new demographic groups.**

**-Individuals who hold this position should have some form of on-the-job education and/or training regarding the Americans with Disabilities Act of 1990.**

**-Individuals should have experience riding both the Omnitrans fixed-route and paratransit systems after being accepted for the position of Travel Trainer.**

**- An individual who holds this position should have either education or experience that relates to fundamental concepts of human service agencies and the structures of both not-for-profit and public organizations.**

**-Required: A Valid California Driver License; Desirable: Class B Commercial Driver License, Passenger and Air Brake Endorsements, Verification of Transit Training Document (VTT)**

**-It is desirable for a Travel Trainer to have knowledge of medical terminology, conditions, disabilities, and techniques for working with individuals who have a disability. -**

**Presentations to other Agency employees as well as members of the community is an integral part of the CTSA's outreach efforts. A Travel Trainer is required to have strong public speaking skills that will allow for them to speak professionally to a large audience.**

**SECTION 3: - EDUCATION AND EXPERIENCE (continued)**

3. WHAT TYPES OF EQUIPMENT, MACHINERY, OR TOOLS, IF ANY, MUST YOU USE IN THE PERFORMANCE OF YOUR JOB DUTIES?

**Due to the extensive field work the position requires, proficiency in mobile technology is required, such as with cell phones and tablet computers. Proficiency in computer technology and standard office equipment necessary, as well as familiarity with databases and data entry. Proficiency in use of phones is particularly important as clients are contacted via telephone when they are next on the waitlist.**

4. EXPERIENCE REQUIREMENTS:

A. PLEASE LIST THE MINIMUM TYPES AND LENGTH OF WORK EXPERIENCE REQUIRED BEFORE A PERSON CAN PERFORM YOUR JOB:

Type of Experience	Length of Time
<b>Customer Service-Working with clients from a variety of backgrounds</b>	<b>2</b>
<b>Phone Skills-Contacting clients from waitlist, case workers, etc.</b>	<b>1</b>
<b>General computing-Use of database, mobile technology, data entry</b>	<b>1</b>

Total Work Experience: **4 years**

B. WHAT IS THE LENGTH OF THE TRAINING PERIOD REQUIRED FOR A NEW EMPLOYEE ON YOUR JOB TO BECOME FULLY FUNCTIONAL IF HE/SHE POSSESSES THE QUALIFICATIONS YOU HAVE LISTED ABOVE?

**An employee who possesses the qualifications I have listed above will require at minimum one year of experience to become fully functional, while two years of experience may be likely for many individuals. The necessary knowledge to make sound recommendations for clients comes primarily from experience working with various types of disabilities, as well as from the Travel Trainer gaining more experience themselves using the Omnitrans family of services. A Travel Trainer needs to have experience working with multiple clients who range in terms of their level of functioning, to understand the similarities and differences between one who is high-functioning versus another who is low-functioning.**

C. IF RECRUITING FOR THIS POSITION, IN WHAT INDUSTRIES WOULD YOU LOOK?

**I would look for individuals in disability services, human services, not-for-profit organizations, public transportation, social services, healthcare, or education.**

D. IF RECRUITING FOR THIS POSITION, WHAT MIGHT BE THE  
CANDIDATE'S CURRENT JOB TITLE?

**Travel Trainer, Individual or Group Aide with a Special Education Program,  
Human Services Program Coordinator**

**SECTION 4: - SUPERVISORY RESPONSIBILITIES**

1. THE FOLLOWING THREE STATEMENTS DESCRIBE LEVELS OF SUPERVISORY RESPONSIBILITY. CHECK THE ONE THAT BEST DESCRIBES YOUR JOB.

I do not manage the work of others.

I provide work direction to others, but do not have direct performance appraisal responsibility for them.

I have full supervisory responsibility for others, including performance appraisal and delegated authority to hire, fire, and approve salary actions.

I have this responsibility for:

non-management employees only,

management or professional employees only, or

both non-management and management employees.

**For a group training or presentation, a specific travel trainer will be designated as the point of contact for both Agency employees and external organizations. That travel trainer will be responsible for scheduling the activity, providing an itinerary if needed, recruiting other trainers for assistance if necessary, and answering questions for all involved parties. In coordinating the event, the travel trainer who is point of contact will advise the other participating trainers of their responsibilities during the activity.**

2. IF YOU DIRECTLY SUPERVISE OTHER EMPLOYEES, INDICATE THE TITLE(S) OF THE POSITION(S) SUPERVISED AND, FOLLOWING THE TITLE, THE NUMBER OF EMPLOYEES ASSIGNED TO THE POSITION(S). IF YOU DO NOT SUPERVISE ANYONE DIRECTLY, PLEASE MARK "N/A".

TITLES(S)

NUMBER OF  
PEOPLE

N/A

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. IF YOU INDIRECTLY SUPERVISE OTHERS (that is, if you have people report to you through someone else who then reports to you directly), INDICATE THE TITLE(S) OF THE POSITION(S) INDIRECTLY SUPERVISED AND, FOLLOWING THE TITLE(S), THE NUMBER OF EMPLOYEES ASSIGNED TO EACH POSITION.

TITLE (S)

NUMBER OF  
PEOPLE

N/A

**SECTION 5: - ORGANIZATIONAL CONTACTS**

1. LIST THE TITLES OF PEOPLE WITHIN THE COMPANY THAT YOU MUST WORK WITH TO DO YOUR JOB. IN ADDITION, PLEASE LIST THE REASON FOR THESE CONTACTS AND THE FREQUENCY OF THESE CONTACTS (FOR EXAMPLE, YOU MAY SPEAK WITH A PAYROLL CLERK ONCE PER WEEK TO RELAY INFORMATION ABOUT NEW HIRES).

Title	Reason for Contact	How Often?
	<b>-Operations Fleet &amp; Safety Training Supervisor, discuss coach operator presentation scheduling and advise of upcoming Travel Training Bus presentations, interaction on monthly basis</b>	
	<b>-Operations Fleet &amp; Safety Trainer, schedule coach operator presentations, interaction on weekly basis</b>	
	<b>-Operations Dispatch, advise of use of Marketing Coach for presentations, interaction on weekly basis</b>	
	<b>-Coach Operator, board coach with client during travel training, interaction on daily basis</b>	
	<b>-Maintenance Supervisors, advise of use of Marketing Coach for presentations, interaction on weekly basis</b>	
	<b>-Transportation Manager, advise of client feedback or experience on fixed-route system, interaction on monthly basis</b>	
	<b>-Stops and Stations Supervisor, advise of concerns observed in field with passenger zones, interaction on monthly basis</b>	
	<b>-Scheduling &amp; Service Manager, advise of concerns observed in field with routing or scheduling performance, interaction on weekly basis</b>	
	<b>-Paratransit Eligibility Technician, follow up on client inquiries related to paratransit service, interaction on daily basis</b>	
	<b>-Purchased Transportation Administrator, advise of concerns related to paratransit service delivery and client experience, interaction on monthly basis</b>	

2. LIST THE TITLES OF PEOPLE OUTSIDE THE COMPANY THAT YOU MUST WORK WITH TO DO YOUR JOB (e.g., vendors, bankers, service companies, etc.). ALSO LIST THE NAME OF THE ORGANIZATION THEY WORK FOR, THE REASON YOU HAVE CONTACT WITH THEM, AND THE FREQUENCY WITH WHICH YOU INTERACT WITH THEM.

Title	Organization	Reason for Contact	How Often?
-------	--------------	--------------------	------------

**-Consumer Services Coordinator (CSC), Inland Regional Center, provide updates on performance of clients who they refer to program and give recommendations on whether suitable for fixed-route transportation, interaction on daily basis**

**-Case Worker, Department of Rehabilitation, provide updates on performance of clients who they refer to program, interaction on daily basis**

**-Case Worker, Department of Adult and Aging Services, provide updates on performance of clients who they refer to program, interaction on daily basis**

**-Community Manager/Activity Coordinator, various senior housing complexes, coordinate presentation events for residents, interaction on weekly basis**

**-Special Education Teacher, various school districts, coordinate group training events or presentations, interaction on monthly basis**

**-Workability Coordinator, various school districts, coordinate group training events or presentations, interaction on monthly basis**

**SECTION 5: - ORGANIZATIONAL CONTACTS (continued)**

THIS ITEM ALSO PERTAINS TO THE INTERPERSONAL CONTACTS WHICH YOU MUST MAINTAIN WITH OTHER EMPLOYEES, VENDORS, EXECUTIVES OF THE COMPANY AND/OR OUTSIDE INDIVIDUALS OF VARIOUS TYPES IN YOUR NORMAL DAILY WORK. CHECK THE STATEMENT THAT MOST ACCURATELY REFLECTS THE TYPE OF CONTACTS YOU NORMALLY HAVE.

- \_\_\_\_\_ The personal contacts I have during a normal workday are with my immediate associates in my section and generally deal with matters of a routine nature. My contacts require ordinary courtesy to avoid friction in relationships.
- \_\_\_\_\_ The personal contacts I have are generally of a routine nature in one or several other sections, departments, or divisions, or they require close collaboration with other members of the same section, department, or division.
- \_\_\_\_\_ The personal contacts I have involve telephone or written communication with individuals primarily inside, but occasionally outside, the Company and may involve answering routine inquiries or discussion of non-controversial matters.
- \_\_\_\_\_ The personal contacts I have involve frequent telephone or written communication with individuals outside the Company in administrative positions and may involve answering routine inquiries or discussion of non-controversial matters.
- X** The personal contacts I have involve frequent personal contact with individuals in management or executive positions, wherein I present information and recommendations. I (may) also answer outsiders' requests for nonroutine information requiring tact in presentation.
- \_\_\_\_\_ My personal contacts are of considerable importance inside and outside the Company wherein failure to exercise judgment or diplomacy may result in losses to the Company.
- \_\_\_\_\_ I have regular contact with the Board of Directors of the Company.

**FREQUENT PERSONAL CONTACT WITH INDIVIDUALS IN MANAGEMENT POSITIONS**

**One type of circumstance which is involved in a Travel Trainer making recommendations for a client is when there is a dispute between the consumer, their family, the agency, and other stakeholders. Disputes often arise from whether an individual does in fact have the ability to ride the fixed-route system, where the agency may be at odds with the consumer and/or their family regarding what form of transportation will be funded. In completing my final reports, I am required to develop sound conclusions regarding the ability of an**

client and provide sufficient evidence to support my position. This documentation can be forwarded to higher levels of management within a partner agency, and I can be contacted for follow-up information regarding a client's performance.

#### **ANSWER OUTSIDERS' REQUESTS FOR NONROUTINE INFORMATION REQUIRING TACT IN PRESENTATION**

If a consumer at an agency changes their case worker, I may be contacted by the new caseworker to provide clarification or additional information regarding the consumer's performance in the program. If the case worker advises that the consumer will require transportation to a new destination for work or school, I may be required to provide a recommendation for the new destination based on their performance from past training. As the difference in expense for the agency to fund fixed-route versus paratransit service is significant, I need to be able to provide enough detailed information to support the recommendation that I make. I also may be contacted by either case workers or the family of a client to be advised of a problem which has occurred while the client uses the fixed-route system, whether it may be a behavioral issue or trouble navigating the system. I am required to address such concerns by providing detailed information from the profile of what training approach was used and how it should have prevented the concern from occurring in the first place.

## **SECTION 6: - PLANNING**

EACH OF THE FOLLOWING STATEMENTS DESCRIBES ONE OPTION IN A RANGE OF OPTIONS CONCERNING THE SCOPE OF THE PLANNING ACTIVITIES THAT A PERSON DOES AS PART OF HIS/HER JOB. PLEASE CHECK THE ONE STATEMENT THAT BEST DESCRIBES YOUR PLANNING RESPONSIBILITIES.

\_\_\_\_\_ I do not do any planning.

**X** I plan my own work load.

\_\_\_\_\_ I plan my own work load and the work of one or more people in my work group.

\_\_\_\_\_ I plan the work for the entire department.

\_\_\_\_\_ I plan the work for two or more departments.

\_\_\_\_\_ I plan the work for the entire region.

\_\_\_\_\_ I plan the work for the entire organization.

**I am fully responsible for ensuring that I engage in productive, meaningful activity each workday. This is accomplished through maintaining an updated Exchange calendar that shows a description and location of each activity conducted in the community, as well as necessary travel time to each assignment. When a travel training client requests information, I am responsible for conducting appropriate research and obtaining the materials needed to adequately address the inquiry. I am also responsible for ensuring that my schedule accommodates training and presentation opportunities which may arise for the CTSA. The Programs Administrator occasionally monitors the Exchange calendar to verify that activities scheduled are reasonable and contribute to the goals and objectives of the CTSA, but does not directly schedule the activities of my workday.**

### **COACH OPERATIONS**

**For the Travel Training Bus, I am responsible for the planning of all activities related to the use of the coach for presentations. This includes conducting pre-trip activities, as well as verifying ahead of time the most suitable parking location of the coach when presenting to an organization. I am also responsible for connecting with Maintenance and Operations**

**Dispatch to ensure that the coach will be available and ready for use on a scheduled presentation date.**

## **SECTION 6: - PLANNING (CONTINUED)**

If you do some form of planning, please identify the timespan of your planning activities.

\_\_\_\_\_ I only plan my work on a day to day basis.

\_\_\_\_\_ I plan on a weekly basis.

\_\_\_\_\_ I plan on a monthly basis.

**X** I plan projects with a month to six month timespan.

\_\_\_\_\_ I plan projects with a six month to one year timespan.

\_\_\_\_\_ I plan for annual budgets and up to 2 years in advance.

\_\_\_\_\_ I am involved in strategic planning for the organization and plan on a 3 to 5 year basis.

**Organizations that host community fairs or other types of outreach must account for facility and staffing needs months in advance to have a successful event. As a result, in assisting the department with coordinating outreach activities, I must be able to plan on projects up to 6 months ahead of schedule. This ensures that we can meet the deadlines of host organizations that offer the CTSA an opportunity to attend their event with the goal of recruiting new participants for our programs. Travel trainers must also assist the Programs Administrator in continually networking and finding new opportunities for partnerships, presentations, and outreach to expand our reach into the community.**

### **COACH OPERATION**

**Because of how organizations need to schedule Travel Training Bus events with sufficient time to notify their clients and have an audience ready, presentations are scheduled several months in advance. This advance scheduling allows for organizations to publish events in newsletters or other forms of correspondence for their clients.**

## **SECTION 7: - -SKILLS AND ABILITIES**

Please check the statement that most closely matches the skills and abilities required for the position.

### LANGUAGE SKILLS

- \_\_\_\_\_ Ability to read a limited number of two- and three-syllable words and to recognize similarities and differences between words and between series of numbers. Ability to print and speak simple sentences.
- \_\_\_\_\_ Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to customers, clients, and other employees of the organization.
- \_\_\_\_\_ Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of the organization.
- X** Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.
- \_\_\_\_\_ Ability to read, analyze, and interpret common scientific and technical journals, financial reports, and legal documents. Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community. Ability to write speeches and articles for publication that conform to prescribed style and format. Ability to effectively present information to top management, public groups, and/or boards of directors.
- \_\_\_\_\_ Ability to read, analyze, and interpret the most complex documents. Ability to respond effectively to the most sensitive inquiries or complaints. Ability to write speeches and articles using original or innovative techniques or style. Ability to make effective and persuasive speeches and presentations on controversial or complex topics to top management, public groups, and/or boards of directors.

### **READING, ANALYSIS, AND INTERPRETATION**

**-I am responsible for having knowledge on the latest trends both for disability services and public transportation in general. I must be able to understand changes in these areas as presented through professional articles, to the extent that I can cover applicable information to clients while performing travel training duties. I must be knowledgeable at all times of changes in regulations as they relate to seniors or individuals with disabilities,**

and advise clients of changes to their rights and responsibilities when using the fixed-route system.

### **WRITING**

-I am responsible for completing final reports that effectively communicate the performance of a client in the Travel Training Program. I must clearly present my conclusions and provide sufficient supporting evidence for any recommendation or position taken in the final report.

-I must be able to effectively communicate in writing with potential referral sources to gather information about prospective clients. I also must be able to effectively communicate about the programs and services that the CTSA offers. When an opportunity for community outreach arises with a new organization, I must be able to provide sufficient information through writing regarding our requirements for conducting a presentation, as well as details such as the date, time, and location of the event.

-I must possess writing skills proficient enough to allow for me to describe in detail any incidents or concerns which arise in the course of performing my job duties. Information which I provide in writing is used for the purpose of documentation when issues arise in the course of doing business.

### **PRESENTATION AND ABILITY TO RESPOND TO QUESTIONS**

-I assist with community outreach presentations, which could include setting up a table at an information fair, conducting a presentation in a classroom-style setting, or onboard the Omnitrans Travel Training Bus.

-In my position, I conduct presentations for new coach operators, existing coach operators, prospective clients, and prospective client referral sources. I am required to present information to these groups in a way that is relatable to their experiences while at the same time conveying vital information of how our programs operate. Not only am I required to have sufficient knowledge to answer questions about the CTSA's own programs, but as a representative of the Agency, I should also have sufficient knowledge of general information about Omnitrans services for the general public.

## SECTION 7: - -SKILIS AND ABILITIES (continued)

### MATHEMATICAL ABILITY

- \_\_\_\_\_ Ability to add and subtract two digit numbers and to multiply and divide with 10's and 100's. Ability to perform these operations using units of American money and weight measurement, volume, and distance.
- X** Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.
- \_\_\_\_\_ Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.
- \_\_\_\_\_ Ability to work with mathematical concepts such as probability and statistical inference, and fundamentals of plane and solid geometry and trigonometry. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

**I am required to have the mathematical skills that allow for me to provide quantitative information of my activities serving clients and conducting outreach. For example, I should be able to summarize the number of hours spent working with each client, as well as other figures such as the number of routes, number of destinations, and total number of days spent together. This knowledge ensures that I am able to understand program statistics and also can present them upon request.**

### BAR GRAPHS

**I am required to understand bar graphs and other forms of graphical representation, and identify trends in the data and draw a conclusion for how well a particular area of the program is operating. Examples of factors which may need to be evaluated using graphs include changes in the number of outreach events per month, number of new client referrals, and the ridership of successful participants who continued traveling on the fixed-route system using their award passes.**

### REASONING ABILITY

- \_\_\_\_\_ Ability to apply common sense understanding to carry out simple one- or two-step instructions. Ability to deal with standardized situations with only occasional or no variables.

\_\_\_\_\_ Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.

\_\_\_\_\_ Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

**X** Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

\_\_\_\_\_ Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

### **CONCRETE VARIABLES**

**Concrete variables in client service would consist of identifying prominent barriers and manifestations of a client's disability. Examples would include difficulty with verbal communication, lack of reading proficiency, social behavior which deviates from what is considered acceptable, lack of eye contact, short-term memory loss, difficulty walking long distances, or visual impairments. These variables are concrete due to how it is highly unlikely that these barriers will improve during the course of travel training.**

### **LIMITED STANDARDIZATION**

**The Travel Training Manual produced by Innovative Paradigms identifies common disabilities and how they manifest themselves, as well as suggestions and tools that can be adopted when working with clients. However, guaranteed approaches are not provided in the manual, and ongoing research of disabilities continues to provide new revelations on the physical and/or intellectual impacts on individuals. As a result, I am required to consider the determined barriers that an individual has, and rely on my own experience and creativity to determine the best approach to overcome barriers.**

### **INTERPRETATION OF INSTRUCTIONS**

**As a Travel Trainer, I am required to have sufficient knowledge of the Americans with Disabilities Act to be able to educate clients on their rights and responsibilities as a passenger with a disability. Because of the ambiguity of some portions of the ADA, I am required to consult with academic sources and other professionals from the transit and disability service industries to enhance my understanding of the law and recent updates to it. I am also required to interpret the general information provided in the Travel Training Manual by Innovative Paradigms to determine what kind of approach is best suited for each of the disabilities I encounter while providing client service.**

## **SECTION 8: - ACCOUNTABILITY**

EACH OF THE FOLLOWING STATEMENTS DESCRIBES ONE OPTION IN A RANGE OF POSSIBILITIES CONCERNING THE TYPE OF SUPERVISION AND GUIDANCE A PERSON RECEIVES AS PART OF HIS/HER JOB. PLEASE CHECK THE ONE STATEMENT THAT BEST DESCRIBES THE KIND OF SUPERVISION YOU RECEIVE.

- \_\_\_\_\_ I am constantly supervised; I make no decisions independently and work according to procedure.
- \_\_\_\_\_ I am closely supervised; I have very little flexibility in the methods I use or in assigning priorities to my tasks.
- \_\_\_\_\_ I am frequently supervised; My activities are governed by well established rules and procedures and are periodically monitored; some flexibility to determine method or scheduling.
- X** I am generally managed; My activities are governed by general department and of company rules and procedures or schedules and are sometimes monitored; moderate flexibility to determine method, high flexibility to determine scheduling.
- \_\_\_\_\_ I have occasional oversight; My activities are governed by general organizational roles and procedures, I have considerable autonomy within established timeframes.
- \_\_\_\_\_ I work independently on a major function, guided by company policies. I exercise a high degree of initiative involving major programs and commitment. My work is monitored by exception and management information reports. I am almost autonomous in my work.
- \_\_\_\_\_ My work is entirely self-directed; I answer only to the Board of Directors.

### **GENERALLY MANAGED**

**-I am required to ensure that my Exchange calendar is complete so that my supervisor, the Programs Administrator, is aware of the work activities I am completing during each day. I am responsible for ensuring that my calendar reflects the time and location where an activity will take place, as well as necessary travel and whether the mode of travel is car, bus, or train.**

**-I am also required to carry an Agency-provided tablet and/or smartphone which allows for the Programs Administrator to verify my location and ensure it corresponds to the**

activity listed in my Exchange calendar. However, I complete my duties out in the field without the actual physical presence of my immediate supervisor.

#### **MODERATE FLEXIBILITY FOR METHOD**

-I follow a general approach to travel training, which incorporates routing, functional assessment, training, shadowing, and reporting. Variations exist within this general process for how to complete training, and some more experienced clients may not require completion of every step in the process. For example, one client who rides the bus for the first time may need to be shadowed both from the back-of-the-bus and from my personal car, while a more experienced transit rider will not need to be shadowed at all. The general process is followed for the training process, but I can modify the process to cater to each individual's needs and abilities.

#### **HIGH FLEXIBILITY FOR SCHEDULING**

-I however am responsible for completing the duties which are indicated in my calendar. I am responsible for determining what activities are necessary to fulfill my job duties, as well as for determining what a reasonable time frame is for completing those duties. I have the flexibility to schedule functional assessments and training sessions with clients directly, and setup the dates and times based on their availability as well as mine. I have the flexibility to work a rotating schedule to accommodate individuals who may need to travel on the system earlier in the morning or later in the evening.

## **SECTION 9: - DECISION-MAKING, COMPLEXITY AND PROBLEM-SOLVING**

1. EACH OF THE FOLLOWING STATEMENTS DESCRIBES ONE POSITION IN A RANGE OF POSITIONS CONCERNING THE VARIETY OF WORK DONE WITHIN A JOB. PLEASE PUT A CHECK MARK IN FRONT OF THE ONE STATEMENT THAT MOST CLOSELY DESCRIBES THE VARIETY OF TASKS THAT ARE NORMALLY A PART OF YOUR JOB.

- \_\_\_\_\_ I perform routine and generally repetitive duties involving little or no variety. I follow simple and easily understood procedures that do not require independent judgment and analysis.
- \_\_\_\_\_ I work on a limited variety of routine tasks which are relatively simple tasks of a clerical or manual nature; I may make minor decisions involving accuracy, quality, method of operation or set-ups.
- \_\_\_\_\_ I work on a wide variety of routine tasks that involve some choice of action within limits.
- \_\_\_\_\_ I work on diversified tasks that involve a wide range of complex but standardized procedures, semi-routine duties may involve solving frequent problems. I work according to assigned objectives and may work independently on special projects.
- I work on non-routine tasks within general procedures or guidelines, and that involve the analysis and solution of complex problems based on facts, within broad policies and objective guidelines.
- \_\_\_\_\_ I do specialized or technical work with unclear guidelines. My work is analytical and involved, and requires judgment where policies and methods are not well established, problem solving requires innovation, ingenuity, planning, and coordination of effort.
- \_\_\_\_\_ I do creative work of a research or development nature with few precedents or examples.

### **GENERAL PROCEDURES OR GUIDELINES**

**-I am required to follow a general approach for serving clients, which includes routing, functional assessment, training, shadowing, and reporting. There are general guidelines for**

how to complete each process, outlined in the Travel Training manual produced by Innovative Paradigms, the model that the Omnitrans Travel Training Program is based off of. The manual provides information regarding the purpose of each process as well as tips and tools which can be used to assist clients with varying types of disabilities. However, the manual does not provide concrete procedures that can be applied without modification or variation for any specific type of disability.

### **NON-ROUTINE TASKS**

-The Travel Training manual provided by Innovative Paradigms can only provide suggestions and tips for working with individuals for disabilities. Because of the wide variation of disabilities, there is no one-size-fits-all approach that can be consistently relied upon for travel training. The barriers identified for an individual during their functional assessment determines the learning activities and supplementary materials which they will require to be successful in riding fixed-route transportation. For example, a client with a strong sense of direction may only require carrying a copy of the Bus Book with them to have the information they need for navigation. Another client may require custom timetables, instructions on mobile applications and online trip planners, verbal drilling of training concepts, or additional practice to gain the same level of confidence. The effort required for providing additional resources is dependent on each individual's unique needs.

### **SOLUTION OF COMPLEX PROBLEMS**

-There is no one-size-fits-all approach to assisting individuals with disabilities, as conditions can present themselves in infinite ways. Travel trainers must be able to accurately identify the unique barriers that an individual has, and develop training strategies that will effectively address those barriers. Travel trainers must consider facts such as the level of independence a client currently has in their daily life, their ability to communicate either through verbal or nonverbal means, and whether it is possible to mitigate a specific barrier that a client has.

-I may be required to consult with colleagues or research information from other experts in the field to develop solutions for some problems.

**SECTION 9:- DECISION-MAKING, COMPLEXITY, AND PROBLEM-SOLVING (Continued)**

2. EACH OF THE FOLLOWING STATEMENTS CONCERNS THE VARIETY OF DECISION-MAKING LATITUDE A PERSON CAN HAVE IN A JOB. PLEASE PUT A CHECK MARK IN FRONT OF THE ONE STATEMENT THAT MOST CLOSELY DESCRIBES THE DECISION-MAKING LATITUDE THAT IS NORMALLY A PART OF YOUR JOB.

\_\_\_\_\_ Position duties involve little or no decision making activities.

\_\_\_\_\_ Position duties involve providing counsel and information used in the decision making process, but do not involve making decisions or recommendations.

\_\_\_\_\_ Position duties involve providing counsel and information, and also involve making some recommendations.

\_\_\_\_\_ Position duties involve making some decisions and making many recommendations.

\_\_\_\_\_ Position duties involve making frequent decisions and frequent recommendations. I make decisions and take actions that are later subject to review.

Position duties involve making constant decisions and providing the authorization of recommended courses of action.

\_\_\_\_\_ Position duties involve decision making having international impact on the Company. I make decisions and take actions independently without anyone's review.

**MAKING CONSTANT DECISIONS**

**-While the functional assessment process provides a detailed overview of a client and the barriers they face, the relatively short period of time spent on a functional assessment compared to training out in the field can result in some barriers or complications not being discovered until later on in the process. As a travel trainer gets to better know their client and observe their behavior out in the field, continuous reevaluation is required and the approach must be appropriately modified to ensure a successful outcome. Furthermore, clients who have never ridden public transit before may base responses to some questions**

in the functional assessment only from perceptions, and their actual behavior and responses can be quite different once they are out in the field. For example, a client may suggest that they are reserved and prefer not to have contact with others, but may engage in conversation frequently with other passengers. In this case, the training approach would have to be adjusted to focus on what types of conversation are and are not appropriate to have with other passengers, something that may not have been thought of as a concern from the results of the assessment. Travel trainers continuously must monitor such changes with their clients and must quickly and appropriately modify their approach based on these changes.

#### **PROVIDING AUTHORIZATION OF RECOMMENDED COURSES OF ACTION**

-The findings provided in the final report for each client are regularly used by agencies such as the Inland Regional Center and Department of Transportation to determine what kind of transportation they will provide for a specific consumer. Inland Regional Center has required some consumers to undergo a functional assessment and attempt travel training on the fixed-route system before a request for paratransit services is granted. Under these circumstances, in the final report I am required to provide a recommendation of whether a client is best suited for the fixed-route system, and provide supporting evidence that demonstrates the conclusion I draw. This report can then be used as the primary basis for the decision regarding whether the agency will fund paratransit fare payment for the consumer. Only the travel trainer can make such determinations regarding whether fixed-route service is suitable for an individual, because of the thorough functional assessment which is conducted after intake, and recommendations are commonly used as the final decision by the agency.

-Recommendations by travel trainers from final reports are often used as the primary supporting documentation for an individual applying for paratransit eligibility service. Travel trainers provide official verification of whether an individual does or does not have the ability to ride the fixed-route system after conducting a professional functional assessment.

-Conclusions provided in final reports are used by clients for other purposes such as providing the basis for eligibility for services from the Inland Regional Center, Department of Rehabilitation, or for Social Security Disability Insurance benefits. The authority of a travel trainer's recommendation for such purposes is established by the detailed process for conducting a functional assessment, as well as the requirement of supporting evidence that identifies what a client can perform from a transit perspective.

## **SECTION 10: - IMPACT OF ERRORS**

CHECK THE ONE STATEMENT THAT MOST ACCURATELY DESCRIBES THE POTENTIAL CONSEQUENCES OF THE ERRORS THAT MAY OCCUR IN THE COURSE OF YOUR NORMAL WORK.

- \_\_\_\_\_ My errors cause little difficulty or loss of time to correct. Most of my errors are detected through routine checking procedures.
- \_\_\_\_\_ My errors do not result in overall embarrassment to the Company or in monetary losses but (may) waste supplies and require expenditure of time to track and correct.
- \_\_\_\_\_ My errors may cause the Company to incur a modest financial loss or may cause modest embarrassment.
- \_\_\_\_\_ My errors may result in considerable financial loss and/or embarrassment to the Company and may adversely affect some aspect of our business.
- X** My errors have serious financial impact and/or may seriously impair achievement of Company goals and commitments.

### **POTENTIAL ERRORS FOR THE POSITION**

**-My primary responsibility as a Travel Trainer is to ensure that I model behavior that adheres to high standards for safety, and that I ensure my clients also exhibit the same level of safety while out in the field.**

**-The position involves working with individuals who may have mental or psychological impairments that could impact their ability to learn. The position also involves working with individuals who may be low-functioning and/or have low levels of independence in their current living situation. Conventions of safety and personal security that may be perceived as common sense by others could be unfamiliar to these individuals. Travel trainers are responsible for the safety and well-being of their clients while working out in the field, especially those who are vulnerable due to a lack of experience being out on public streets and highways.**

**-As a Travel Trainer, I cannot engage in negligent behavior which is included but not limited to disregard of laws for pedestrians on public roads, reckless behavior, promoting risky behavior when safer alternatives are available, or selecting paths of travel which put clients at significant risk from vehicular traffic or other environmental hazards. Even if an incident were not to occur during travel training, by engaging in negligent behavior, I would be promoting behavior that could put the client's life and well-being in danger. A**

client could later be harmed by such behavior when replicating it on their own upon completion of the travel training program.

-I am also responsible for ensuring that the data I collect and the information in my reporting accurately reflects a client's abilities as well as their performance in the program. The conclusions which I present in reporting must be valid and based on accurate observations of the client while working out in the field. Failure to be diligent in reporting activities could result in an individual riding the fixed-route system when it is not a suitable solution for them. Depending on the type and severity of the disability, this could lead the individual to become a danger for themselves, other pedestrians, passengers onboard the bus, Coach Operators and other Omnitrans employees, and motorists. Regardless of whether a client was successful or not, reporting should provide details of their performance that support the conclusion that I have made about if the fixed-route system is suitable for them.

### **FINANCIAL IMPACT**

-The agency could be held liable for damages to a client as a result of negligent behavior on the part of a Travel Trainer. The expense of legal action could eliminate all savings which the Travel Training Program generates for the agency, and potentially consume existing resources the Agency intends to use for other purposes.

-The CTSA could potentially lose eligibility for grant funds that support the Travel Training Program because of negligence or other significant error on my part.

**IMPAIRMENT OF COMPANY ACHIEVEMENT OF GOALS AND COMMITMENTS -** Significant error on my part could result in the impairment of the Management Plan's strategic initiative to have a CTSA which pursues growth and opportunities for new partnerships with the community. Significant error would conflict with the Agency's desire for providing quality service which is beneficial for the community.

-Significant error would harm not only the reputation of the CTSA, but also the Agency with the community. Current referral streams could lose confidence in the integrity of the Omnitrans Travel Training Program, and growth of the program could be hindered if no additional referrals are provided. Other community partners could lose confidence in the CTSA and lose interest in the desired partnerships that increase the CTSA's impact in the community it serves. The expertise of the CTSA would be diminished, and community partners would likely no longer seek assistance from the CTSA for concerns such as determining whether an individual can successfully use fixed-route transportation.

-The San Bernardino County Transportation Authority (SBCTA) designated Omnitrans as the CTSA to consolidate all transportation services for seniors and individuals with disabilities within one organization. Significant error on my part that contributes to the demise of the CTSA could result in a loss of SBCTA support for Omnitrans to retain such a designation if negative attention is drawn. SBCTA has already transferred CTSA designation before due to unrelated reasons, and could do so again if unsatisfactory performance resulted from me committing a serious error.

### **COACH OPERATION ERRORS AND IMPACT**

-The Travel Training Bus is a standard 40-foot coach that is simply designated for use by STS, and cannot be used to provide revenue service. Otherwise, the implications of being at

fault for an incident while operating the Travel Training Bus are the same as if any of our other coaches were involved. Impacts of an error while operating the coach could include increased liability costs, the potential to cause bodily harm or death in a collision, damage to the coach which could render it unusable either temporarily or permanently, and interruption of outreach efforts using the coach.

**SECTION 11: - WORKING CONDITIONS**

How much exposure to the following environmental conditions does this job require? Show the amount of time by checking the appropriate boxes below.

	Amount of time			
	None	Up to 1/3	1/3 to 2/3	2/3 and more
Wet, humid conditions (non -weather)	X			
Work near moving mechanical parts	X			
Work in high, precarious place	X			
Fumes or airborne particles	X			
Toxic or caustic chemicals	X			
Outdoor weather conditions				X
Extreme cold (non weather)	X			
Extreme heat (non weather)	X			
Risk of electrical shock	X			
Work with explosive	X			
Risk of radiation	X			
Vibration		X		

**OUTSIDE WEATHER CONDITIONS**

I provide year-round service to Travel Training clients, which results in exposure to extreme heat or cold that is weather-related. With how I can be required to walk longer distances exceeding a mile between a client’s residence and the nearest bus stop, I can be exposed to heat or cold for extended periods of time. Pedestrian paths of travel may not

**have shade trees, which results in direct exposure to sunlight for extended periods of times. There is also no guarantee of any amenities available when arriving at a bus stop, nor is there a guarantee of the amount of time spent at a bus stop while subject to the elements.**

**VIBRATION (COACH OPERATION)**

**When operating the Travel Training Bus, I am subject to experiencing vibration and shaking from traveling on roads in poor repair.**

How much noise is typical for the work environment of this job? Check the appropriate level below.

\_\_\_\_\_ Very Quiet (Examples: forest trail, isolation booth for hearing test)

\_\_\_\_\_ Quiet (Examples: library, private office)

**X** \_\_\_\_\_ Moderate Noise (Examples: business office with typewriters and/or computer printers, light traffic)

\_\_\_\_\_ Loud Noise (Examples: metal can manufacturing, department, large earth-moving equipment)

\_\_\_\_\_ Very Loud Noise (Examples: jack hammer work, front row at rock concert)

**While working out in the field, I am generally exposed to noise from light or medium traffic on public roads. This is while waiting at a bus stop either alone or with a client. I occasionally am subject to louder noise if there is road construction or other loud activity occurring within the vicinity of a public right of way.**

## **SECTION 12: - PROBABILITY OF INJURY OR ACCIDENT**

Which of the following statements most closely describes the probability of injury or accident in your working environment? Please cite one or two examples if appropriate.

- \_\_\_\_\_ While performing my normal work activities, there is generally little or no probability of injury or health impairment.
- \_\_\_\_\_ While performing my normal work activities, accidents are improbable outside of temporary minor injuries such as cuts, bruises or sprains.
- \_\_\_\_\_ While performing my normal work activities, I have relatively high exposure to hazards which are likely to produce temporary cuts, bruises or sprains.
- \_\_\_\_\_ While performing my normal work activities, I have occasional exposure to serious potential injury or health hazard such as severe burns, fractures or similar disablements.
- X** While performing my normal work activities, I am frequently exposed to serious potential injury or health hazard such as severe burns, fractures or similar disablements.

Examples

### **POTENTIAL INJURY SOURCES**

**-I work in environments that are not under the jurisdiction of Omnitrans, and therefore cannot be maintained by the Agency to enhance safety. Physical hazards for infrastructure along the public right of way where job duties are regularly conducted include potholes in roads, damaged or raised sidewalks, dirt or grass paths of travel, walking parallel to a slope along the side of a public road or highway, locations with poor street lighting during early morning or evening hours, neighborhoods where wild animals or loose pets run free, or steep grades. My job duties also regularly require that I travel by foot through private property, where in addition to hazards that could be present on public rights of way, I also could be injured by clutter on the floor or from poorly constructed structures.**

### **HEALTH HAZARDS**

**-I risk exposure to diseases or infections which a client or member of their household may have, and not have it disclosed during the functional assessment.**

**-The position requires that I conduct functional assessments in the private residences of our clients. As a result, I may be subject to working in residences where there is animal or**

human waste present, mold, mildew, insect or rodent infestation, number of residents exceeding local housing regulations, or other unsanitary conditions. My health is subject to harm in such environments regardless of whether I can immediately identify and escape from the hazard.

**HAZARDS UNIQUE TO POSITION WHICH ARE NOT ADDRESSED IN PIQ FORM** -My job duties require me to regularly walk alone in neighborhoods with higher crime rates. I can be required to walk alone in a hostile environment, such as a racially-segregated neighborhood, where my personal appearance and demeanor may not correspond to those of neighborhood residents.

-My likelihood of becoming a victim of a crime of opportunity is significantly high, especially when completing assignments alone out in the community. I am regularly required to walk in neighborhoods with a high presence of vagrants and gang members, who may be present either individually or within a group. Obtaining emergency assistance in these types of locations could be difficult if neighborhoods are isolated and/or law enforcement response times are poor.

-The functional assessment process for the program requires that I conduct in-home assessments alone with clients in their private residences. Normally I have never met the client before, have no understanding of the purpose of their interest in the program, and do not have information related to their personal background. For an individual with a psychological disability, there is no certainty that I will be received favorably when I arrive at the residence, or that the individual will not have a negative reaction to my arrival. Because of the limited background information I have for each client, I also do not have any ability to determine the risk of the myself becoming a victim of assault, robbery, or other crime when entering a private residence.

**SECTION 13: - PHYSICAL DEMAND**

Please check the box that most accurately describes the amount of time you spend on the following activities.

	Amount of time			
	None	Up to 1/3	1/3 to 2/3	2/3 and more
Stand				X
Walks				X
Sit		X		
Talk or hear				X
Use hands to finger, handle or feel				X
Climb or balance	X			
Stoop, kneel, crouch or crawl	X			
Reach with hands and arms				X
Taste or smell	X			

**The Travel Trainer position heavily revolves around outdoor activities. Travel trainers may be required to walk distances which exceed the agency’s half-mile walking standard for fixed-route services. Terrain may vary, from flat terrain to steep inclines in foothill communities. Standing is also a common activity when waiting with a client at a bus stop, particularly if seating is either occupied or even available at all. During the travel training process, Trainers are also continually engaged in conversation, explaining procedures such as fare payment, passenger etiquette, and properly completing the trip being covered. Travel trainers must also answer questions and address concerns which clients may have about either the program or the use of fixed-route transportation.**

Does this job require that weight be lifted or force be exerted? If so, how much and how often? Check the appropriate boxes below.

	Amount of time			
	None	Up to 1/3	1/3 to 2/3	2/3 and more
Up to 10 pounds			X	
Up to 25 pounds		X		
Up to 50 pounds	X			
Up to 100 pounds	X			
More than 100 pounds	X			

**EXAMPLES**

**For community outreach events, I may be required to carry loads of up to 25 pounds consisting of flyers and equipment necessary for display to the public. While completing**

normal job duties out in the field, I generally carry a backpack with necessary equipment, where the weight generally does not exceed 10 pound.

#### **SECTION 14: - VISION REQUIREMENTS**

Does this job have any special vision requirements. Check all that apply.

\_\_\_\_\_ My job requires close vision (clear vision at 20 inches or less).

**X** My job requires distance vision (clear vision at 20 feet or more).

**X** My job requires color vision (ability to identify and distinguish colors).

**X** My job requires peripheral vision (ability to observe an area that can seem up or down or to the left and right while eyes are fixed on a given point).

**X** My job requires depth perception (3- dimensional vision, ability to judge distances and spatial relationships).

\_\_\_\_\_ My job requires ability to adjust focus (ability to adjust the eye to bring an object into sharp focus).

\_\_\_\_\_ My job requires no special vision requirements.

#### **DISTANCE VISION**

**A travel trainer must be able to identify prominent landmarks along public roads and highways that are at least a quarter mile away. They must be able to recognize these landmarks and provide training to their clients on identifying such landmarks. During the back-of-bus shadowing activities, Travel Trainers should be able to identify from a distance such landmarks so that they can intervene if a client files to press the signal tape at the correct time.**

#### **COLOR VISION (COACH OPERATION)**

**During the pre-trip inspection of the Travel Training Bus, color vision is required to verify leaking fluids from the bottom of the bus, to determine whether it is condensation from the**

air conditioner or a potential problem with another fluid system. I also cannot operate the vehicle during early morning or evening hours without color vision, as I would have no means whatsoever of identifying the color of a traffic signal.

#### **PERIPHERAL VISION (COACH OPERATION)**

To safely operate the coach for Travel Training Bus presentations, I am required to have good peripheral vision that allows for me to scan the road ahead for all possible hazards, while still maintaining a safe following distance from the vehicle ahead of me.

#### **DEPTH PERCEPTION**

I am required to have depth perception so that I can determine which landmarks are the best for a client to use when pressing the signal tape. I must be able to determine whether a landmark offers the Coach Operator sufficient time to stop the bus, while at the same time reducing the risk of the Operator forgetting about the request if done too far ahead. I should then be able to explain the reasoning for selecting a landmark, and advise the client of why other surrounding landmarks would not be optimal for use.

## **SECTION 15: - ADDITIONAL COMMENTS**

Please add any additional comments that you feel are appropriate.

- **Travel Trainers must be able to quickly address incidents where clients are physically, cognitively, or emotionally overwhelmed by the experience of riding public transit, while ensuring their safety and well-being until an emergency contact can arrive or they can be returned to their home. With limited standardization, trainers must also make accurate determinations regarding whether a client should or should not continue the travel training process.**
- **The responsibilities of a Travel Trainer do not merely revolve around taking clients on the bus. Trainers are an essential element to other areas of CTSA success, including:**
  - **Marketing: Coordinating outreach events and community presentations**
  - **Employee training: Developing and conducting presentations that provide education to Coach Operators and other Agency employees on the role of the CTSA and its various operations**
  - **Public Relations: Travel Trainers serve as representatives of the Agency when working in the field, where they develop relationships with their clients and better connect the Agency to its customers**
  - **Networking: Travel Trainers interact with other human services professionals while performing their duties and engaging in outreach efforts. This provides new opportunities for the CTSA to develop partnerships with other community organizations, and extends its reach within the community.**
- **The position's current title of "Travel Trainer" does not reflect the level of expertise which an incumbent is required to have to be effective in serving sensitive groups such as seniors and individuals with disabilities. This expertise should be reflected through modifying the title, with "Mobility Specialist" as a potential new title which better reflects the responsibilities of the position to conduct thorough assessments and make decisions from their findings.**

THANK YOU



SUBJECT

Salary Ranges  
Management Confidential Classifications

APPROVED BY OMNITRANS  
BOARD OF DIRECTORS

DATE: March 1, 2017

EFFECTIVE: March 1, 2017- November 1, 2017

I. Purpose

To state Omnitrans' policy on salary ranges for Management and Confidential classifications.

II. Scope

All Departments

III. Procedure

A. The Director of Human Resources Safety & Regulatory Compliance is responsible for compensation administration and will modify and issue, from time to time, pay ranges and guidelines for salary adjustments as approved by the Board of Directors.

B. The CEO may increase the range to accommodate salary in lieu of providing an agency vehicle when necessary.

Classification	Minimum	Mid-Point	Maximum
<u>Level I</u> (reserved for future consideration)			
<u>Level II</u> Director of Finance Director of HR SRC Director of Information Technology Director of Internal Audit Director of Maintenance Director of Marketing & Planning Director of Operations Director of Procurement Director of Special Transportation Services Director of Rail Operations	8,314	10,323	12,332
<u>Level III</u> Accounting Manager Contracts Manager Database Manager (moved from Level 4 & technical title change at June 7, 2017 Board meeting) Development Planning Manager Employee Relations Manager Facility Manager Maintenance Manager Safety & Security Regulatory Compliance Manager Service Planning Manager Transportation Manager Treasury Manager	6,791	8,414	10,037



SUBJECT

Salary Ranges  
Management Confidential Classifications

APPROVED BY OMNITRANS  
BOARD OF DIRECTORS

DATE: March 1, 2017

EFFECTIVE: March 1, 2017- November 1, 2017

Rail Compliance Officer

Level IV 6,245 7,359 8,475

Capital Projects Services Manager (re-evaluated from Construction Safety Manager (IPMO same level)

~~Database Administrator~~ (moved to Level 3; approved at June 7, 2017 Board meeting)

Materials Manager

Network Administrator

Senior Contract Administrator

Special Transportation Services Manager

System Coordinator

Technical Services Manager

Level V 5,419 6,544 7,539

Application Developer

Application Specialist

Sr. Executive Assistant to the CEO/GM

Assistant Transportation Manager

Contract Administrator

Customer Service Manager

Dispatch Supervisor

Environmental/Occupational Health & Safety Specialist

Facility Supervisor

Fleet Safety & Training Supervisor

HR Leave Administrator

Security & Emergency Preparedness Coordinator

Maintenance Supervisor – Special Transportation Services

Marketing Manager

~~Network Technician~~ (moved from Level 6 at June 7, 2017 Board meeting)

Programs Administrator – Special Transportation Services

Purchased Transportation Administrator

Safety & Regulatory Compliance Specialist

Senior Financial Analyst

Shift Supervisor

Systems Engineer

Web Designer

Level VI 4,773 5,719 6,665

Accountant

Executive Staff Assistant

Field Supervisor

Fleet Safety & Training Instructor

Human Resources Analyst

Human Resources Specialist

~~Network Technician~~ (moved to Level 5; approved at June 7, 2017 Board meeting)



SUBJECT

Salary Ranges  
Management Confidential Classifications

APPROVED BY OMNITRANS  
BOARD OF DIRECTORS

DATE: March 1, 2017

EFFECTIVE: March 1, 2017- November 1, 2017

Scheduling Analyst  
Sales Supervisor  
Stops and Stations Supervisor  
Transit Technical Trainer

Level VII 4,356 5,221 6,086

Contract Review Analyst  
Department Senior Secretary  
Dispatcher  
Marketing Specialist  
Planner I

Level VIII 3,800 4,426 5,053

Administrative Secretary  
Fleet Analyst  
Human Resources Assistant  
Paratransit Eligibility Technician  
Payroll Technician  
Warranty Coordinator

~~Client Relations Coordinator – Special Transportation Services~~ ( w/BOD approval 11/1/17)  
~~Travel Trainer – Special Transportation Services~~ ( w/BOD approval 11/1/17)

Level IX 3,130 3,657 4,183

Human Resources Clerk  
Administrative Assistant – Special Transportation Services  
Class B Technician – Special Transportation Services  
~~Client Relations Coordinator – Special Transportation Services~~  
~~Travel Trainer – Special Transportation Services~~

When range changes occur every two years, Management & Confidential employees will maintain the same placement (compa ratio) in the new range.

~~The following classifications are for Capital Projects and are mandated by the FTA:  
Level I~~

~~Level II 8,314 10,323 12,332  
Construction Manager~~

~~Level III 6,791 8,414 10,037  
Quality Assurance Manager~~

~~Level IV 6,245 7,359 8,475~~



SUBJECT

**Salary Ranges  
Management Confidential Classifications**

APPROVED BY OMNITRANS  
BOARD OF DIRECTORS

DATE: March 1, 2017

EFFECTIVE: March 1, 2017- November 1, 2017

~~Construction Safety Manager~~—(re-evaluated to Capital Projects Services Manager (Level IV))

~~Level VI~~ ————— ~~4,773~~ ————— ~~5,719~~ ————— ~~6,665~~  
~~Project Analyst~~

~~Level VIII~~ ————— ~~3,800~~ ————— ~~4,426~~ ————— ~~5,053~~  
~~Adm. Secretary-Capital Projects~~

ITEM #           E5          

**DATE:** October 12, 2017

**TO:** Committee Chair Sam Spagnolo and  
Members of the Administrative and Finance Committee

**THROUGH:** P. Scott Graham, CEO/General Manager

**FROM:** Marjorie Ewing, Director of Human Resources Safety & Regulatory Compliance

**SUBJECT: PERSONNEL POLICY MANUAL PROPOSED CHANGES**

**FORM MOTION**

Recommend the Board of Directors approve the proposed revisions to the following Personnel Policies effective November 1, 2017.

- #106 Confidential Information & Document Retention
- #206 Orientation
- #304 Reclassification & Emergency Classification
- #705 Disciplinary Actions

**BACKGROUND**

Annually the Agency reviews the Personnel Policy Manual and proposes changes for the Board to consider approving. The policies above do not require the unions to be notified as there is no meet and discuss necessary.

**FUNDING SOURCE**

Any increased costs associated with the recommended action will be covered in the Fiscal Year Budgets.

Department: All  
Account: Salaries and Benefits

\_\_\_\_\_ Verification of Funding Source and Availability of Funds  
(Verified and initialed by Finance)

**CONCLUSION**

If approved by the Administrative and Finance Committee on October 12, 2017, the recommendation for adoption to the Board of Directors would be presented at the November 1, 2017 Board Meeting with an effective date of November 1, 2017. Approval of this agenda item supports the Strategic Plan, Section IX: Organizational and Workforce Excellence Goal for Fiscal Years 2017 – 2020, adopted on April 6, 2016.

PSG:ME



## PERSONNEL POLICY MANUAL

POLICY 106 PAGE 1 OF 3

SUBJECT

**Confidential Information & Document Retention**

APPROVED BY OMNITRANS  
BOARD OF DIRECTORS

Proposed November 1, 2017

DATE: **January 1, 1999**

### I. Purpose

To state Omnitrans' policy on confidential information and Document Retention consistent with the Secretary of State Local Government Records Management Guidelines. These guidelines are an initial attempt to provide standards and structure to the local government records management effort. The goal of the State Archives in compliance with Government Code 12236 is to consolidate information resources and provide local government with a single source for archival and records management support and guidance. A retention schedule is an agency's legal authority to receive, create, retain, and dispose of official public records. It assists the agency by documenting which records require office or temporary storage, which records have historic and research value, and which records should be destroyed because they no longer have any administrative, fiscal or legal value. In the event of litigation, courts generally accept a retention schedule as establishing an agency's "normal course of doing business".

<http://archives.cdn.sos.ca.gov/local-gov-program/pdf/records-management-8.pdf>.

### II. Scope

All Departments

### III. Procedure

A. An annual board agenda item will be established for review and approval by the Board of Directors for the destruction of records.

B. As appropriate, each Department Director will make known to subordinates which information is regarded as confidential. No employee will disclose such confidential information except as authorized or required by law or office nor otherwise use such information for personal gain or benefit. All personnel records will be confidential except when law requires disclosure and document retention will be in compliance with Government Code 12236.

C. The following definitions apply to the various categories of proprietary information normally handled by certain Agency employees in the course of carrying out their assigned responsibilities:

1. Personal and Confidential: Information of a personal nature and certain types of operating information that must be controlled on a strict need-to-87



## PERSONNEL POLICY MANUAL

POLICY 106 PAGE 2 OF 3

SUBJECT

### **Confidential Information & Document Retention**

APPROVED BY OMNITRANS  
BOARD OF DIRECTORS

Proposed November 1, 2017

DATE: **January 1, 1999**

know basis.

2. Legal Confidential: Any communication requesting or furnishing legal opinion, analysis or advice.
  3. To Be Opened by Addressee Only: A marking on an envelope or package containing Personal and Confidential information indicating that it is to be opened only by the individual to whom it is addressed.
  4. To Be Opened by Addressee or Designee Only: A marking on an envelope or package containing confidential information, indicating it is to be opened only by the person to whom it is addressed or by the person designated to act in his or her absence.
  5. Authorized Persons: Individuals who have been authorized to receive Personal and Confidential, or Legal Confidential information.
  6. Need to Know: Any individual to whom proprietary information must be disclosed in the performance of his/her regular duties has a need to know.
- D. Examples of the types of information that might come under each of these categories include such types of information as system confidential, personal and confidential, and legal confidential.
1. Agency Confidential information includes such items as working papers related to projects of a sensitive nature, i.e., labor negotiations, workforce level studies, service changes, etc.
  2. Personal and confidential types of information includes personnel actions (promotions, demotions, resignations, bonuses, compensation and benefits data, performance appraisals, disciplinary actions, consultations and grievance information etc. -- until released officially); controversies within or between department staffs; psychological assessment reports; or information of an embarrassing nature.
  3. Legal confidential information includes legal advice and opinion communicated by the attorney to Omnitrans; documents revealing the substance of legal advice received from legal counsel; communications to legal counsel for the purpose of obtaining legal advice; information or data furnished at the request of legal counsel to enable legal service or advice to be given.



## PERSONNEL POLICY MANUAL

POLICY 106 PAGE 3 OF 3

SUBJECT

**Confidential Information & Document Retention**

APPROVED BY OMNITRANS  
BOARD OF DIRECTORS

Proposed November 1, 2017

DATE: **January 1, 1999**

- E. The primary responsibility for safeguarding confidential or proprietary information rests with management. Employees at every level of the Agency should:
1. Provide secure storage for sensitive documents during working hours and when not in use;
  2. Ensure that confidential information is properly packaged prior to transmittal; ensure that recipients have a legitimate need to know.
  3. Limit reproduction and distribution of sensitive information to what is absolutely necessary;
- F. Any department that is responsible for reproducing proprietary information ("reproduction" in this context includes word processing) should make sure that access is kept to a minimum and granted only to those individuals with a need to know. If the nature or volume of the information being reproduced makes controlled access impractical, area controls should be instituted until the work is completed. When Confidential, Personal and Confidential, or Legal Confidential documents are reproduced by a graphic arts shop, duplicating room, etc., the material should be hand-delivered to the supervisor in charge, who should assign an authorized employee to complete the work and return it to the supervisor, including all excess or spoiled copies.
- G. When not in use or in transit, proprietary information should be stored in a cabinet or other container secured with a locking device. The combination or key should be similarly safeguarded, and not kept in an unlocked desk or file cabinet as a convenience for daily access.
- H. Any willful, intentional disclosure of proprietary information to unauthorized persons will be considered sufficient cause for disciplinary action, including termination of employment if necessary.



**SUBJECT**

**Orientation**

**APPROVED BY OMNITRANS  
BOARD OF DIRECTORS**

Proposed: November 1, 2017

**DATE:** July 1, 2015

**I. Purpose**

To state Omnitrans' policy on employee orientation.

**II. Scope**

All Departments

**III. Procedure**

- A. The orientation of a new employee is the final step in the hiring process. Without a planned orientation program, employees would be compelled to ask their co-workers for the information they need, and might be misinformed. A well-organized orientation program enables new employees to be sure that they are getting all the facts firsthand, increases morale, and contributes to a more positive attitude toward Omnitrans.
  
- B. Omnitrans has devised a formal Orientation Program for all new employees. It consists of three phases: Phase I: Human Resources Department; Phase II: Supervisor and Phase III: Safety and Security Office. In Phase I, the Human Resources Department will review agency policies, benefits and may conduct required training (such as Drug and Alcohol training for safety sensitive positions). In Phase II, the new employee's Supervisor/department will train the employee in department procedures and position duties. In Phase III, Safety and Security introduces new, transferred and returning employees to all necessary safety and security information specific to their job and tasks, and informs them of workplace hazards. It is required that each of the three phases of the Orientation Program be completed. The orientation of new employees is very important and should be carried out conscientiously. Every effort should be made to assimilate employees into the workforce and to make them feel welcome.
  
- C. Omnitrans will use a mentor system to assist new employees in making adjustments as a productive member of the workforce. In order to assure a timely orientation and assimilation of new employees into the workforce, Department Directors are required to appoint a "mentor" for each new employee.



SUBJECT

**Reclassification & Emergency Classification**

APPROVED BY OMNITRANS  
BOARD OF DIRECTORS

Proposed November 1, 2017

DATE: July 1, 2015

**I. Purpose**

To state Omnitrans' policy on reclassification & emergency classification.

**II. Scope**

All Departments

**III. Procedure**

- A. When the duties of positions have changed materially so as to necessitate reclassification, they shall be allocated to a more appropriate level class, whether new or already created, by recommendation of the Director of Human Resources Safety & Regulatory Compliance and upon approval of the CEO/General Manager and Board of Directors.
- B. Reclassification of a position to a different level requires the position to be adjusted within the salary range. A reclassification does not change the position date or the performance evaluation date of an incumbent in the position.
- C. If classification action on a position is urgent, the CEO/General Manager may allocate the position to a proper classification and salary range. The temporary allocation shall become policy upon approval of a classification action by the Board of Directors.



SUBJECT

**Disciplinary Actions**

APPROVED BY OMNITRANS BOARD OF DIRECTORS

DATE: ~~Jan 5, 2011~~ November 1, 2017

### I. Purpose

To state Omnitrans policy on all suspensions, demotions, reductions in salary step for a specified time period and dismissals of persons with regular status in their classification.

### II. Scope

All Departments

*NOTE: If the employee is a member of a represented unit, the grievance process in the MOU will be followed. The following process will apply to management and confidential employees.*

### III. Procedure

A. **EMPLOYEE STATUS:** An employee with regular status level I through level IX in their classification may be demoted, suspended, reduced in salary step, or dismissed. **Level I through Level IV classifications are considered at-will employees.**

The following are declared to be examples of causes for such action, although charges may be based upon causes other than those listed below:

1. Failure to meet reasonable work performance standards and requirements.
2. Discourteous treatment of the public or other employees.
3. Willful or negligent disobedience or conviction for violation of any law, ordinance, Omnitrans rule, departmental regulation, or superior's lawful order while working.
4. Misappropriation or damage of public property or waste of public funds or property through negligent or willful misconduct.
5. Conduct unbecoming an employee of Omnitrans.
6. Absence without approved leave.
7. Tardiness or absenteeism.
8. Practicing deception or fraud in the securing of a job appointment or



SUBJECT

**Disciplinary Actions**

APPROVED BY OMNITRANS BOARD OF DIRECTORS

DATE: ~~Jan 5, 2011~~ November 1, 2017

promotion.

9. Failure to supply full information as to character, reputation, medical history, or acts which, if known at the time of appointment, might have resulted in a disqualification of the employee for the job to which appointment was made.

10. Falsification of an official statement, document or Agency record.

11. Incapacity to perform job duties.

12. Neglect of duties.

14. Possessing, or using narcotics or alcohol on Omnitrans property or reporting to work under the influence of same.

15. Improper withdrawal or limitation of service or any action which interferes with or is disruptive of Omnitrans mission or the public service.

16. Insubordination.

17. Any action inconsistent with or in violation of these rules or officially promulgated department or Omnitrans Personnel Policies, Codes of Performance, policies and practices.

18. Involvement in a preventable accident while operating an Agency vehicle or while on Agency business.

19. Committing any act of violence, i.e., fighting, brawling, or improper conduct on Agency property.

20. Sleeping during working hours.

21. Excessive use of Agency communication equipment or other equipment for personal use.

B. **PROBATIONARY EMPLOYEES:** can be dismissed, demoted, reduced in step, or suspended without right of review or appeal.

C. **NOTIFICATION:** A written copy of these rules and policies will be available to employees and constitutes presumptive proof of the employee's knowledge of said rules and policies.

D. **PROCEDURES FOR DISCIPLINARY ACTION:** Prior to the issuance of a written order to either suspend for more than five (5) working days, demote,



SUBJECT

**Disciplinary Actions**

APPROVED BY OMNITRANS BOARD OF DIRECTORS

DATE: ~~Jan 5, 2011~~ November 1, 2017

reduce in step, or dismiss an employee with regular status in their classification, written notice of at least two (2) working days of the proposed disciplinary action shall be given before such action is to be taken and must include:

1. Notice of proposed action.
2. Reasons for proposed action (see paragraph A).
3. A copy of charges stating specific incidents or specific courses of conduct, and a copy of the written materials pertaining to those incidents or course of conduct; and,
4. A notice to the employee of the right to respond in writing and/or orally to the proposed disciplinary action before said discipline is imposed. The notice to the employee of the right to respond must specify at least a two (2) working day period except as provided in Section E below. A longer notice might be warranted in specific cases because of the volume of material or complexity of the issues involved.

**E. NOTICE OF PROPOSED ACTION:** The notice of proposed disciplinary action must be in writing and be signed by the appointing authority or the appointing authority's designee. Upon receipt of the employee's response, the appointing authority or the appointing authority's designee shall review the response and determine the appropriate course of action. This may include imposing the same level of disciplinary action, modifying with less severe disciplinary action, or rescinding the notice of proposed action. A copy of the notice of proposed disciplinary action shall be provided to the Human Resources Safety & Regulatory Compliance Department/Employee Relations Manager.

Oral notice is insufficient as full notice to an employee and may be given only as the initial notice in extraordinary circumstances which call for immediate action or as provided in paragraph above.

Employees may be suspended without prior written notice in extraordinary circumstances when it is essential to avert harm to the public, other employees, or to avert serious disruption of governmental business. Extraordinary circumstances include, but are not limited to, situations involving, misappropriation of public funds or property; working while under the influence of alcohol or drugs; sexual and other forms of harassment; open insubordination; commission of a crime involving moral turpitude punishable by imprisonment for six (6) months or more; and disruption of Omnitrans business through willful misconduct (altercations, etc.). There are times that the allegations make it necessary to take immediate remedial measures that may include, but are not limited to, a paid leave pending an investigation.



SUBJECT

Disciplinary Actions

APPROVED BY OMNITRANS BOARD OF DIRECTORS

DATE: Jan 5, 2011 November 1, 2017

F. **SKELLY:** After completing the requirement of "notice of proposed action" (paragraph D & E including the right to request a skelly hearing within two (2) days of receipt of the Proposed Action, the employee response will be considered and a recommendation made of appropriate action by a Skelly Officer is presented to the Appointing Authority for consideration. The imposition of disciplinary action to suspend, demote, reduce in step, or dismiss is constituted by the written order.

G. **WRITTEN ORDER OF DISCIPLINE:** Said order is similar to the notice of proposed disciplinary action in that it contains the effective date of disciplinary action, the right to appeal, and specific charges upon which the disciplinary action is based. The effective date may be prior to the order, provided the circumstances warranted such immediate action. The order shall be signed by the appointing authority or the appointing authority's designee. Notice of the time allowed for appeal and answer shall be stated in the order. A copy of the order shall be personally served on the employee or sent by mail with a proof of service, the order will be deemed received (5) five calendar days after mailing to the employee's last known address. A copy of the original order shall be filed with the Human Resources Safety & Regulatory Compliance Department and shall be accompanied by information showing that the employee has been served either personally or by proof of mail service. Copies of these documents are also placed in the employee's personnel file.

The order of suspension, demotion, reduction in salary step, or dismissal may be withdrawn by the appointing authority at any time prior to a final decision on the discipline. An order may be amended by the appointing authority filing the order at any time prior to or during the commencement of the review proceedings. If an amended order presents new causes for discipline, the employee shall be afforded all of the procedural safeguards given in paragraph D & E prior to the discipline becoming effective. In addition, the employee shall be afforded a reasonable opportunity to prepare the defense and must file an amended answer within seven (7) calendar days of receipt of the order.

H. **APPEAL OF THE ORDER:** An employee with regular status may appeal from an order of suspension, demotion, reduction in salary step, or dismissal as provided in the review procedure. The notice of appeal must be in writing and must be filed with the employee's immediate supervisor within seven (7) calendar days of receipt of the order.

If the employee appeals, a written answer to the charges must be filed with the employee's immediate supervisor within seven (7) calendar days of the receipt of the order. The answer to the charges must be attached to the notice of



SUBJECT

**Disciplinary Actions**

APPROVED BY OMNITRANS BOARD OF DIRECTORS

DATE: Jan 5, 2011 November 1, 2017

appeal.

The answer must admit or deny each cause for discipline set forth in the order and may state specific facts or reasons as grounds for appeal. The answer may be ruled insufficient if, in the opinion of the appropriate individual(s) stipulated in the review procedure, the facts and reasons stated, even if true, would not entitle the appellant to prevail. If an answer denying the causes for discipline set forth in an order is not filed, said causes for discipline will be deemed admitted.

Any employee, served with an order of discipline, who wishes to have said action reviewed shall have their case proceed in the following manner. The procedures outlined herein constitute the formal steps necessary to resolve an employee's disciplinary grievance. The attempt of settlement of disciplinary grievances filed on behalf of an individual employee(s) in the informal step at the employee supervisor level is discretionary (Reference Section I). The presentation of the informal disciplinary grievance is an absolute prerequisite to the institution of a formal disciplinary grievance.

**I. INFORMAL STEPS – EMPLOYEE-INITIATED**

1. Initially, the employee having an alleged issue shall request a meeting within seven (7) calendar days to discuss the issues(s) with the immediate supervisor informally.
2. Within seven (7) calendar days, the immediate supervisor shall schedule a informal meeting with the employee.
3. The Supervisor shall issue an oral decision to the employee within seven (7) calendar days of the Informal Meeting.

**J. GREIVANCE - Formal Steps**

Step I. If the issue has not been resolved after the informal steps above, the employee shall reduce to writing and submit Department Director or designee and Employee Relations Manager for a Step 1 meeting.

1. The Department Director or designee shall schedule a meeting within seven (7) calendar days of receipt of the employee's grievance form.
2. The Step 1 written decision shall be issued to the employee within seven (7) calendar days of the Step 1 meeting date.

-Step II. If the alleged issue has not been resolved at Step 1, the employee may appeal the Step 1 decision in writing to the CEO/General Manager or designee and a copy to the Employee Relations Manager.



SUBJECT

**Disciplinary Actions**

APPROVED BY OMNITRANS BOARD OF DIRECTORS

DATE: ~~Jan 5, 2011~~ November 1, 2017

1. The CEO/General Manager or designee shall schedule a meeting within seven (7) calendar days of receipt of the employee's request.
2. The Step 2 written decision shall be issued to the employee within seven (7) calendar days of the Step 2 meeting date.

~~Step III~~ IV. If the ~~alleged issue~~ remains unresolved at Step ~~II~~ III, within seven (7) ~~calendar working~~ days of receipt of said decision, the employee may appeal the decision, by requesting, in writing to the Director of Human Resources Safety & Regulatory Compliance. The ~~issue(s) what will be submitted~~ to a Disciplinary Grievance Committee for the purpose of mediating the dispute in an attempt to reach a resolution.

A Disciplinary Grievance Committee made up of a representative appointed by the Agency, a representative appointed by the employee, and a third party mutually selected by the parties.

The third party shall be selected from a list of not more than seven (7) names mutually agreed to by the Parties. Each party shall alternately strike one name from the list until only one name remains. The first party to strike a name shall be determined by lot. Fees and expenses incurred as a result of requesting an impartial third party to resolve an issue are to be shared equally by both parties. Each party will be responsible for their own legal services.

The Disciplinary Grievance Committee shall, within thirty (30) days from receipt of the appeal unless the hearing cannot be held in that time period, hold a hearing to receive testimony and submit its decision to the CEO/General Manager for implementation or further appeal.

In considering recommendations for modification or reversal of a disciplinary action, the Committee should consider the following:

1. The weight of evidence supporting or denying the need for disciplinary action.
2. Whether or not substantive violations or omissions of procedure for disciplinary action was made.
3. Whether the action taken was unreasonable, capricious or arbitrary in view of the offense.

**K. General Provisions**



SUBJECT

**Disciplinary Actions**

APPROVED BY OMNITRANS BOARD OF DIRECTORS

DATE: ~~Jan 5, 2011~~ November 1, 2017

1. No retaliation or prejudice shall be suffered by employees making use of the disciplinary grievance procedure by reason of such use.
2. Failure at any step of this procedure to communicate the decision on the disciplinary grievance by the Agency within specified time limits, shall permit the aggrieved employee to proceed to the next step.
3. Failure at any step of this procedure to appeal a decision on the disciplinary grievance by the aggrieved employee within specified time limits shall be deemed acceptance of the decision rendered.
4. Time limits and/or step(s) in this grievance procedure may be waived or extended by mutual agreement of the parties.
5. Applicable Memorandums of Understanding will apply in disciplinary cases involving represented employees.

ITEM #           E6          

**DATE:** October 12, 2017

**TO:** Committee Chair Sam Spagnolo and  
Members of the Administrative and Finance Committee

**THROUGH:** P. Scott Graham, CEO/General Manager

**FROM:** Marjorie Ewing, Director of Human Resources & Safety Regulatory Compliance

**SUBJECT: FY18 OPERATING BUDGET ADJUSTMENT**

**FORM MOTION**

Recommend the Board of Directors authorize the CEO/General Manager to increase the FY18 head count and Operating Budget by \$248,564 effective November 1, 2017 for three (3) positions in the following departments:

1. Network Technician, Information Technology (IT)
2. Building Maintenance Mechanic; Maintenance
3. Stops & Stations Worker, Marketing-Planning

**BACKGROUND**

The recommendation will address the additional needs of the Agency as it takes on the daily maintenance of the Metrolink platform/parking at San Bernardino Transit Center (SBTC), and the expansion of IT services. These positions are existing positions previously approved by the Board. The position of IT Network Technician is non-represented, the Building Maintenance Mechanic and Stops & Stations Worker are both represented by the Teamsters Local 166 Union.

Stops & Stations Workers are responsible for basic cleaning, trash pickup, graffiti removal, pressure washing and maintenance of bus stops and Omnitrans-owned passenger amenities. These include over 2,500 bus stops, 360 shelters, 490 locations with standalone benches at approximately 800 trash can locations spread over 460 square miles. Additionally, Stops & Stations Workers are responsible for daily cleaning and maintenance of all sbX stations and the SBTC.

Five (5) team members handle the full cleaning load. Two (2) team members are dedicated to repair, installation and emergency cleanup. The full team took on the daily cleaning of the SBTC without additional resources.

The Team is currently servicing approximately six (6) additional acres at the SBTC associated with Metrolink and Future Arrow Service. The additional Stops & Stations Worker is needed to maintain the new facility at the expected level.

Some of the additional tasks required from the Stops & Stations Worker will include: routine pressure washing of approximately 67,000 square feet of station area platforms and sidewalks, removal of trash from the platforms and keeping the platforms and walls graffiti-free. The Stops & Stations Worker increased cost for wages and benefits are \$50,552.

The Building Maintenance Mechanic performs skilled work related to the full range of building maintenance and repair of the Agency facilities. The SBTC has additional square footage which has increased the need for additional maintenance personnel. These duties are currently performed by internal staff and are not contracted. The Building Maintenance Mechanic increased cost for wages and benefits are \$67,606.

The Network Technician manages and engineers existing environments and it will be necessary to extend Trapeze, increase users to TransitMaster and other onboard systems out to the additional system areas at SBTC, sbX, Special Transit Services (STS), STS- Ontario, and Rail. This position manages open tickets, coordinating and tracking tickets as well as assisting in assigning them appropriately, and monitoring system warnings and alerts. Additional tasks in the Department involve the Virtualization of Servers. The physical-to-virtual migration of 150+ servers has created a new backup infrastructure that requires hours of maintenance weekly. The Network Technician increased cost for salary and benefits are \$103,406.

### **FUNDING SOURCE**

The increased operating cost associated with this action for approval (for eight months left in FY2018) is to be added to the department's budget line items not to exceed \$248,564. This will be shared by SBCTA and Omnitrans' Local Transportation Funds (LTF). Details per department are as follows:

IT, salary and benefits \$103,406;  
Maintenance, salary and benefits \$67,606; and  
Marketing/Planning, wages and benefits \$50,552.

Funding for future will be incorporated in the Fiscal Year Budgets going forward.

Department: 1200;1320; and 1400  
Account: Various Wages and Benefits

\_\_\_\_\_ Verification of Funding Source and Availability of Funds  
(Verified and initialed by Finance)

**CONCLUSION**

With the Committee’s approval of the recommendation, these items will be forwarded to the Board of Directors to authorize the FY18 Operating Budget Adjustment effective November 1, 2017 not to exceed \$248,564.

Approval of this agenda item supports the Fiscal Year 2018 Management Plan, Strategic Initiative 6 –Passenger Rail and improves intermodal connectivity; Strategic Initiative 5 – Technology Optimization.

PSG: ME

ITEM #           E7          

**DATE:** October 12, 2017

**TO:** Committee Chair Sam Spagnolo and  
Members of the Administrative and Finance Committee

**THROUGH:** P. Scott Graham, CEO/General Manager

**FROM:** Douglas L. Stanley, Director of Special Transportation Services

**SUBJECT: CALL FOR PROJECTS - 2018 MEASURE I SPECIALIZED  
TRANSPORTATION PROGRAM**

**FORM MOTION**

Recommend the Omnitrans Board of Directors authorize the CEO/General Manager to announce a Call for Projects - 2018 Measure I Specialized Transportation Program for Fiscal Years FY19 and FY20.

**BACKGROUND**

This Call for Projects invites proposals for funding available through Measure I Consolidated Transportation Services Agency (CTSA) funds for the San Bernardino Valley subarea. Applicants may include local government authorities, human and social services agencies, tribal governments, private non-profit and charitable organizations. Projects must improve mobility and/or coordination of transportation services for seniors and/or persons with disabilities in the San Bernardino Valley.

On November 4, 2015, Omnitrans was designated as CTSA for the San Bernardino Valley subarea by San Bernardino Associated Governments (SANBAG; now SBCTA) and allocated Measure I CTSA funds for CTSA operations and to provide for the coordination of transit services for seniors and persons with disabilities.

Omnitrans, working closely with SBCTA, has developed the first-ever Omnitrans Call for Projects to award Measure I funds. The Measure I funds for this Call are funds directly allocated to Omnitrans as CTSA for San Bernardino Valley.

Measure I requires that projects selected for funding must be included in the Public Transit-Human Services Transportation Coordination Plan for San Bernardino County, 2016-2020. The Plan identifies existing transportation services, unmet transportation needs and service gaps, as well as the prioritized goals and strategies for transportation needs of seniors and individuals with disabilities. The current coordinated plan was developed by AMMA Transit Planning for SBCTA and approved by SBCTA's Transit Committee on February 9, 2017.

The Call for Projects covers two funding years: FY19 and FY20 with approximately \$600,000 available each year. Omnitrans is specifying a maximum grant request of \$150,000 per agency under this Call for Projects. Applicants may request up to two years of funding per project. The amounts requested must be appropriate to the proposed project, the benefits to be achieved and the overall cost-effectiveness of the project. Proposals will be evaluated by a panel consisting of representatives from Omnitrans, SBCTA, SBCTA's Public and Specialized Transportation Advisory and Coordination Council (PASTACC), and an outside Agency representative to be named. The panel will use the criteria set forth in the Public Transit-Human Services Transportation Coordination Plan for San Bernardino County, 2016/2020, which are:

- Adequately address the unmet/underserved and individualized transportation needs of the targeted populations.
- Demonstrate coordination efforts between public transit and human service agencies.
- Be financially sustainable and provided in a cost-effective manner.
- Include measurable goals and objectives.
- Build or increase capacity or service quality in addressing mobility needs of the target populations.
- Leverage or maximize existing transportation services and/or funding.
- Measure I Share limited to 70% of project costs, with 30% matched by proposer.

## **CONCLUSION**

With the Committee's recommendation, this item will be forwarded to the Board of Directors to authorize the CEO/General Manager to announce the Call for Projects - 2018 Measure I Specialized Transportation Program for Fiscal Years FY19 and FY20 will start the process for Omnitrans to seek partners for the upcoming two fiscal years to enhance mobility options for seniors and persons with disabilities.

PSG:DS