



RTA BOARD AGENDA

**Wednesday, November 1, 2017 at 8:30 AM
BOARD OF SUPERVISORS' CHAMBERS
COUNTY GOVERNMENT CENTER
1055 Monterey Street, San Luis Obispo, California 93401**

The AGENDA is available/posted at: <http://www.slorta.org>

President: Lynn Compton

Board Members:

John Peschong (First District – SLO County)
Bruce Gibson (Second District – SLO County)
Adam Hill (Third District – SLO County)
Lynn Compton (Fourth District – SLO County)
Debbie Arnold (Fifth District – SLO County)
Tim Brown (Arroyo Grande)

Vice President: Jamie Irons

Tom O'Malley (Atascadero)
John Shoals (Grover Beach)
Jamie Irons (Morro Bay)
Fred Strong (Paso Robles)
Ed Waage (Pismo Beach)
Dan Rivoire (San Luis Obispo)

Individuals wishing accessibility accommodations at this meeting under the Americans with Disabilities Act (ADA) may request such accommodations to aid hearing, visual, or mobility impairment (including Limited English Proficiency [LEP]) by contacting the RTA offices at 781-4472. Please note that 48 hours advance notice will be necessary to honor a request.

FLAG SALUTE

CALL MEETING TO ORDER, ROLL CALL

PUBLIC COMMENT: The Committee reserves this portion of the agenda for members of the public to address the San Luis Obispo Regional Transit Authority Executive Committee on any items not on the agenda and within the jurisdiction of the Committee. Comments are limited to three minutes per speaker. The Committee will listen to all communication, but in compliance with the Brown Act, will not take any action on items that are not on the agenda.

CLOSED SESSION ITEM – CONFERENCE WITH LEGAL COUNSEL (Govt. Code section 54957.6):
It is the intention of the Board to meet in closed session concerning the following items:

Conference with Labor Negotiator Geoff Straw concerning the following labor organization:
Teamsters Local 986

A. INFORMATION AGENDA

A-1 Executive Director's Report (Receive)

B. ACTION AGENDA

B-1 Consider Fiscal Year 2017-18 Capital Budget Amendment (Action)

- B-2 Approval of an Agreement between RTA and Teamsters Local 986 (Action)
- B-3 PUBLIC HEARING: Consider Proposed Changes to Fare Program (Action)

- C. CONSENT AGENDA:** (Roll Call Vote) the following items are considered routine and non-controversial by staff and will be approved by one motion if no member of the RTA or public wishes an item be removed. If discussion is desired by anyone, the item will be removed from the consent agenda and will be considered separately. Questions of clarification may be made by RTA Board members, without the removal of the item from the Consent Agenda. Staff recommendations for each item are noted following the item.

- C-1 Executive Committee Meeting Minutes of August 9, 2017 (Information)
- C-2 RTA Board Meeting Minutes of September 6, 2017 (Approve)
- C-3 RTAC Minutes of July 18, 2017 (Information)
- C-4 Transit Asset Management Plan and Target (Approve)

D. BOARD MEMBER COMMENTS

Next regularly-scheduled RTA Board meeting will be on January 3, 2018.

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

November 1, 2017

STAFF REPORT

AGENDA ITEM: A-1

TOPIC: Executive Director's Report

PRESENTED BY: Geoff Straw, Executive Director

STAFF RECOMMENDATION: Accept as Information

BACKGROUND/DISCUSSION:

Operations:

The 3rd Annual Bus Rodeo was conducted on October 15th, and we had a great turnout. Jose F. is the overall winner, followed by Richard J. and Rod P. Of the four teams (North County, Central, SCT and Maintenance), the Central team was the overall team winner – narrowly defeating the twice-winning SCT team. The Central team is comprised of Richard J., Allison M. and Alfonso O. It was a family-fun event, and I would be remiss if I failed to recognize sponsors Teamsters Local 986 for its generous donation. I also wish to thank all of the volunteer judges, including over 20 Cal Poly student. The SLO County Sherriff's Department and members from our benefits providers (Morris & Garritano for health insurance, CSAC-EIA for workers compensation, and ICMA-RCA for our defined-contribution retirement program) were also on-hand to information to attendees. Finally, Rite-Aid Pharmacy provided flu-shots and general health information.

The Employee of the Quarter luncheon is scheduled for Tuesday October 31st at the RTA Operating facility and the winner will be in attendance. Also in attendance will be Larry Bray, long time RTA Bus Operator, and prior Employee of the Quarter award winner. Larry is retiring after working for RTA and the prior contractor for nearly ten years. Larry has also served as a Union Steward. He will be missed and we wish him well in retirement.

The 30-day protest period on the CEQA Initial Study – Mitigated Negative Declaration report for the Maintenance Facility report officially opened on September 8th and no protests were filed by the October 8th deadline. On September 29th, the Federal Transit Administration sent the concurrence letter providing a Categorical Exclusion finding for the project. The project is now officially entitled from an environmental review standpoint, and we are pleased that SLOCOG has agreed to dedicate the first year's allocation of Senate Bill 1 (SB-1) funds to this important project. I envision requesting future SB-1 funds to help us fund bus replacements that otherwise would have required large proportions of each jurisdiction's Local Transportation Funds.

We received eight bids for the Paso Bus Parking Yard construction project, and Calportland Construction submitted the lowest-cost responsive bid. The good news is that their \$613,480 bid was well below the \$801,600 engineer's estimate. The project has a 70-day construction period, although the modular office trailer will not be delivered until April (delayed by demand caused by the recent hurricanes). A kick-off meeting was held October 25th to finalize schedule details.

The City of San Luis Obispo has authorized the improvements to the Government Center passenger facility, including elimination of two existing on-street automobile parking spaces along Osos. We are finalizing design-build procurement documents, and will begin the solicitation process later this month. Staff will update the Board on the project status at its January 3, 2018 meeting.

Service Planning & Marketing:

Staff conducted a series of public input opportunities to solicit comments on the proposed fare increase. These efforts included "town hall" meetings in Pismo Beach, San Luis Obispo, Morro Bay, Atascadero and Paso Robles, as well as senior staff presentations to each City Council. In addition, the proposal was presented on our website and on the LCD screens on each bus, with a link to an online survey. Finally, we posted notices at the top 30 bus stops in our service area. In general, respondents did not express opposition to the proposed increases to the fare cash and multi-ride instruments, and we received positive support for the services we provide and several suggestions for service improvements. The public will have another chance to comment during today's public hearing.

To bolster customer input opportunities, we have conducted on-board passenger surveys, employee surveys, and an online survey as part of our biennial Customer Perception Survey. These efforts were conducted throughout October, and will include all services directly operated or managed by the RTA.

Finance and Administration:

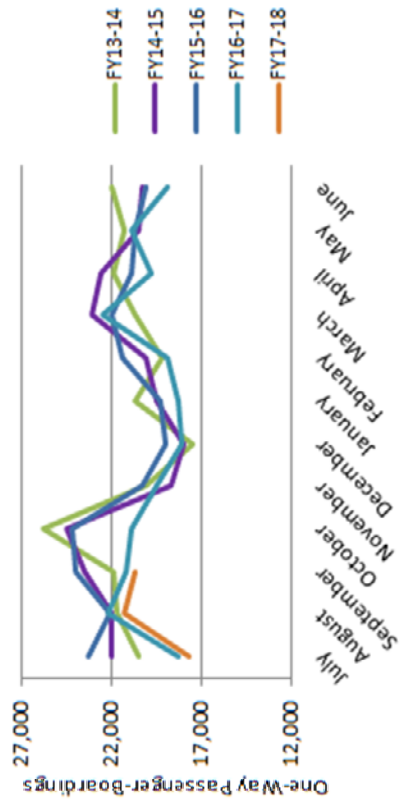
The Regional Transportation Advisory Committee met on October 19th. The RTAC recommends approval of the capital budget amendment (Agenda Item B-1) and the proposed fare program change (B-3) that your Board will consider later today.

Our financial and operating results through the first three months of the fiscal year are shown in the attached tables, as follows:

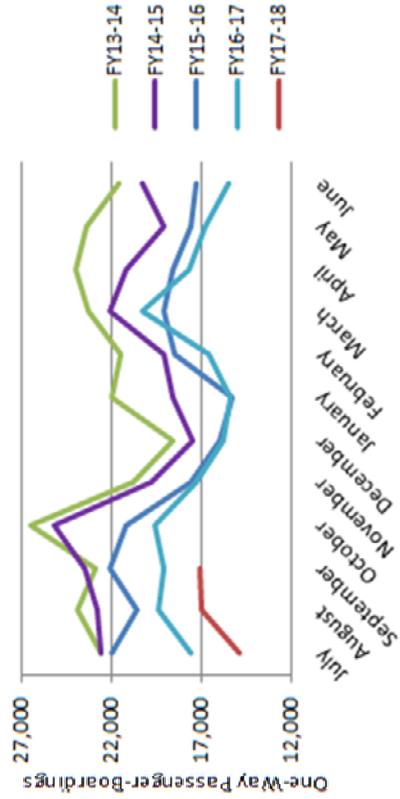
- In terms of overall non-capital expenses, we are slightly below budget – 21.8% through 25% of the fiscal year. Notable large-tickets variances include labor (combined 3.1% below budget), fuel (6.1% below budget), and total vehicle maintenance (5% below budget).

- RTA core fixed-route ridership totaled 186,780 through the end of September 2017. In comparison, the ridership for the same period last year was 198,247, which represents a decline of 5.8%. Interestingly, weekday ridership is down on all four fixed routes. The Route 9 service on weekends experienced increased ridership year over year. Route 14 (essentially Tripper service to/from Cuesta College) is down 54%; we will investigate further and include our campus partners in the discussion.
- Runabout ridership totaled 10,335, which is 7.5% lower than the total from the first three months of the previous year (11,173).

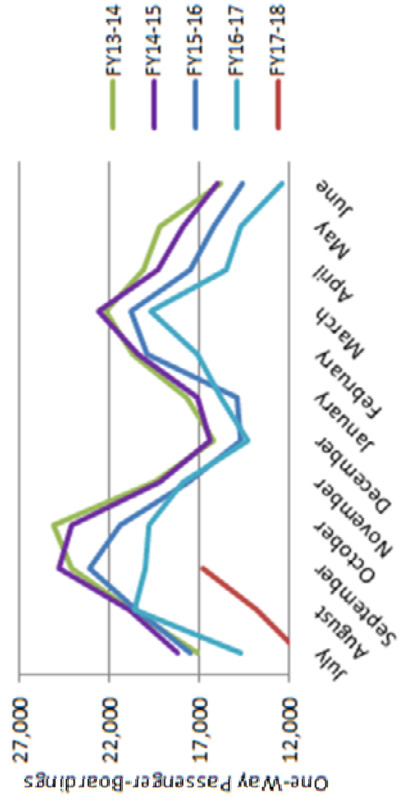
RTA Route 9 Ridership By Month



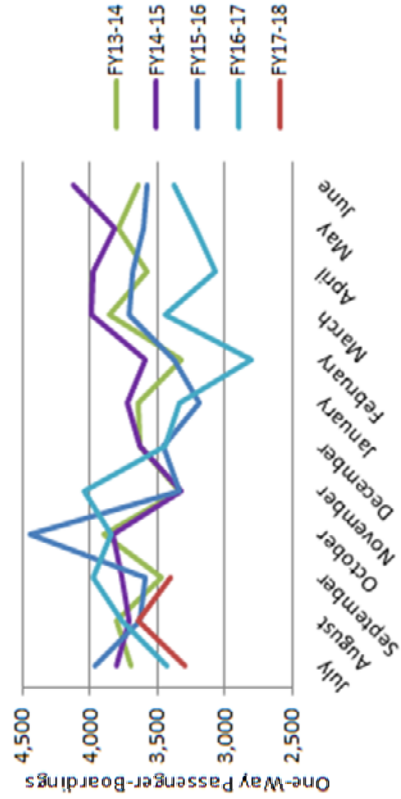
RTA Route 10 Ridership By Month



RTA Rtes. 12, 14 & 15 Pass./Mo.



RTA Runabout Ridership by Mo.



		Adopted Budget FY 2017-18	August Actual	September Budget	September Actual	September Variance	Year to Date FY 2017-18	Percent of Total Budget FY 2017-18
Administration:								
Labor	Hours	77,750	6,198	6,479	5,694	785	17,545	22.6%
	Miles	1,722,730	140,791	143,561	129,164	14,397	398,214	23.1%
	operations cost	855,390	66,632	71,283	66,724	4,558	198,838	23.2%
	operations cost	70,930	36,041	39,823	36,041	3,782	111,123	23.5%
	operations cost	17,240	-	-	-	-	17,200	23.3%
	operations cost	99,990	20,404	8,333	2,710	8,333	20,404	99.8%
	operations cost	37,670	1,843	3,139	2,710	429	5,241	13.9%
	operations cost	270,460	23,201	22,538	29,891	(7,353)	58,603	21.7%
	hourly	90,720	11,047	7,560	13,299	(5,735)	24,903	27.5%
	operations cost	(41,850)	(3,488)	(3,488)	(3,488)	-	(10,463)	25.0%
	operations cost	(85,230)	(7,103)	(7,103)	(7,103)	-	(21,508)	25.0%
	operations cost	(119,270)	(9,939)	(9,939)	(9,939)	-	(29,818)	25.0%
Total Administration		1,673,930	138,639	132,147	128,136	4,011	391,382	23.4%
Service Delivery:								
Labor - Operations	hourly	4,157,720	295,732	346,477	306,036	40,440	898,283	21.6%
Labor - Operations Workers Comp	hourly	479,910	-	-	-	-	112,707	23.5%
Labor - Maintenance	hourly	971,020	71,191	80,918	71,738	9,180	215,336	22.2%
Labor - Maintenance Workers Comp	hourly	140,450	-	-	-	-	32,985	23.5%
Fuel	miles	1,160,530	77,590	96,711	77,105	19,606	219,287	18.9%
Insurance	miles	615,000	51,922	51,250	51,922	(672)	155,765	25.3%
Special Transportation (for SLOCAT and Paso)	n/a	43,900	3,165	3,658	3,020	638	12,514	28.5%
Avila Trolley	n/a	69,900	30,682	11,650	8,524	3,126	28,545	40.8%
Maintenance (parts, supplies, materials)	miles	636,610	56,509	53,051	35,258	17,792	122,880	19.3%
Maintenance Contract Costs	miles	92,100	6,311	7,675	3,162	4,513	23,216	25.2%
Total Operations		8,367,140	593,101	651,390	556,765	94,625	1,821,517	21.8%
Capital/Studies:								
Computer System Maintenance/Upgrades		52,220	-	-	-	-	665	1.3%
Miscellaneous Capital								
Maintenance Software and Maintenance Equipment		34,730	-	-	-	-	-	0.0%
Desks and Office Equipment		6,600	-	-	-	-	-	0.0%
Vehicle ITS/Camera System		85,870	46,883	250	203	47	72,732	84.7%
Bus Stop Improvements/Bus Stop Solar Lighting		34,730	-	-	-	-	-	0.0%
Total Capital Outlay		214,150	46,883	250	203	47	73,397	34.3%
Contingency	hourly	120,490	-	10,041	-	10,041	-	0.0%
Interest Expense	operations cost	30,490	2,044	2,541	1,978	562	6,067	19.9%
Loan Paydown		200,600	-	-	-	-	-	0.0%
Elks Lane Project		499,990	-	8,500	8,348	153	8,348	1.7%
Paso Property Improvements		-	12,113	-	-	-	12,113	#DIV/0!
Management Contracts		246,350	20,529	20,529	20,529	-	61,588	25.0%
TOTAL FUNDING USES		11,353,140	813,310	825,398	715,959	109,438	2,374,411	20.9%
TOTAL NON-CAPITAL EXPENDITURES		10,438,400	754,314	816,648	707,409	109,239	2,280,554	21.8%

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
YEAR TO DATE THRU SEPTEMBER 30, 2017
CURRENT FISCAL YEAR - 2017/2018**

	RT 9 P.R., TEMP., ATAS., S.M., CAL POLY, S.L.O.	RT 10 S.M., NIPOMO, A.G., S.L.O.	RT 12 MORRO BAY, CUESTA, SAN LUIS	RT 14 CUESTA, SAN LUIS TRIPPER	RT 15 SAN SIM., CAMBRIA, CAYUCOS, M.B.	TOTAL RTA CORE SERVICES	RT 7 PASO EXPRESS ROUTE A	RT 8 PASO EXPRESS ROUTE B	TOTAL PASO EXPRESS FIXED ROUTE	PASO EXPRESS DIAL A RIDE	RUNABOUT	SYSTEM TOTAL
REVENUES:												
FARES	\$ 117,536	\$ 117,002	\$ 74,561	\$ 3,888	\$ 10,232	\$ 323,218	\$ 16,846	\$ 18,669	\$ 35,515	\$ 1,562	\$ 33,564	\$ 393,859
TOTAL ROUTE REVENUES	\$ 117,536	\$ 117,002	\$ 74,561	\$ 3,888	\$ 10,232	\$ 323,218	\$ 16,846	\$ 18,669	\$ 35,515	\$ 1,562	\$ 33,564	\$ 393,859
EXPENDITURES:												
ADMINISTRATION	\$ 85,381	\$ 70,752	\$ 47,465	\$ 3,180	\$ 18,191	\$ 224,969	\$ 4,287	\$ 4,167	\$ 8,454	\$ 2,008	\$ 171,327	\$ 406,759
MARKETING	9,451	7,771	5,207	498	1,976	24,903	-	-	-	-	-	24,903
OPERATIONS/CONTINGENCY	261,015	221,821	144,879	9,225	57,869	694,810	69,731	68,211	137,942	29,091	475,081	1,336,925
FUEL	56,396	54,902	30,782	2,284	15,147	159,512	6,725	6,775	13,499	1,045	39,892	213,948
INSURANCE	34,054	33,151	18,590	1,338	45	87,178	4,064	4,096	8,160	1,156	43,901	140,394
TOTAL EXPENDITURES	\$ 446,298	\$ 388,397	\$ 246,923	\$ 16,525	\$ 102,338	\$ 1,191,372	\$ 84,807	\$ 83,249	\$ 168,056	\$ 33,300	\$ 730,201	\$ 2,122,929
FAREBOX RATIO	26.3%	30.1%	30.2%	23.5%	10.0%	27.1%	19.9%	22.4%	21.1%	4.7%	4.6%	18.6%
SERVICE MILES	90,738.4	88,331.2	49,527.4	3,512.1	24,376.1	256,485.1	10,826.1	10,915.3	21,741.4	3,071.0	116,917.0	398,214.4
SERVICE HOURS	3,369.3	2,791.0	1,872.3	128.1	717.2	8,877.8	786.8	764.4	1,551.2	358.1	6,757.8	17,544.8
RIDERSHIP (Automatic Counters)	69,707	60,570	45,889	4,671	5,943	186,780	14,076	13,877	27,953	735	10,335	225,803
RIDERS PER MILE	0.76	0.68	0.94	1.33	0.27	0.73	1.30	1.27	1.29	0.24	0.09	0.57
RIDERS PER HOUR	20.3	21.5	24.8	36.5	9.3	21.0	17.9	18.2	18.0	2.1	1.5	12.9
COST PER PASSENGER	\$ 6.40	\$ 6.41	\$ 5.38	\$ 3.54	\$ 17.22	\$ 6.38	\$ 6.02	\$ 6.00	\$ 6.01	\$ 45.31	\$ 70.65	\$ 9.40
SUBSIDY PER PASSENGER	\$ 4.72	\$ 4.48	\$ 3.76	\$ 2.71	\$ 15.50	\$ 4.65	\$ 4.83	\$ 4.65	\$ 4.74	\$ 43.18	\$ 67.41	\$ 7.66
RIDERSHIP (GFI Fareboxes)	59,553	48,903	35,760	2,150	4,205	150,571	12,725	13,562	26,287	735	10,335	187,928
RIDERS PER MILE	0.66	0.55	0.72	0.61	0.17	0.59	1.18	1.24	1.21	0.24	0.09	0.47
RIDERS PER HOUR	17.7	17.5	19.1	16.8	5.9	17.0	16.2	17.7	16.9	2.1	1.5	10.7
COST PER PASSENGER	\$ 7.49	\$ 7.94	\$ 6.90	\$ 7.69	\$ 24.34	\$ 6.66	\$ 6.66	\$ 6.14	\$ 6.39	\$ 45.31	\$ 70.65	\$ 11.30
SUBSIDY PER PASSENGER	\$ 5.52	\$ 5.55	\$ 4.82	\$ 5.88	\$ 21.90	\$ 5.77	\$ 5.34	\$ 4.76	\$ 5.04	\$ 43.18	\$ 67.41	\$ 9.20

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

November 1, 2017

STAFF REPORT

AGENDA ITEM: B-1

TOPIC: Fiscal Year 2017-18 Capital Budget Amendment

ACTION: Approve FY17-18 Budget Amendment

PRESENTED BY: Tania Arnold

STAFF RECOMMENDATION: Approve Budget Amendment

RTAC RECOMMENDATION: Approve

SUMMARY:

The Fiscal Year 2017-18 RTA operating and capital budget was adopted on May 3, 2017 and was based on a range of assumptions, including pending delivery dates for FY16-17 and FY17-18 capital projects.

At this time, staff is bringing back capital items that are being carried over from FY16-17 to FY17-18 and adding one additional funding source. Please note, none of the items require additional funds.

The following is a detailed description of the proposed budget adjustments that have been incorporated and highlighted in the amended budget on the following pages with the dollar amount increases noted in parentheses in the descriptions below.

Revenue Changes

1. Beginning Fund Balance for Capital (\$274,210): based on FY16-17 STA for capital projects not completed, which resulted in an increase in fund balance available.
2. Low Carbon Transit Operations Program (LCTOP) (\$264,040): based on the timeline for the construction of the new operations facility in Paso Robles with move in slated in early 2018.
3. Proposition 1B Funding - Safety and Security (\$110,180): based on delays in the implementation of vehicle ITS (Intelligent Transportation System) as well as funding for facility security improvements.
4. State Transit Assistance (STA) SB 1 Augmentation (\$441,290): based on the amount approved by the SLOCOG Board at the October 4, 2017 meeting for the RTA design and engineering of the garage facility on Elks Lane. These new SB-1

funds are an important source of capital revenues for the RTA and the other transit operators in our region.

5. Federal Transit Administration (FTA) Section 5307 San Luis Obispo (\$203,760): for the completion of the Elks Lane environmental work as well as the beginning of the design and engineering work. This amount also includes funding for improvements to the transit center on Osos Street.
6. FTA Section 5339 Bus and Bus Facilities (\$79,220): based on delays with implementing the improvements to the transit center on Osos Street.
7. FTA Section 5307 North County (\$793,280): based on the timeline for the construction of the new operations facility in Paso Robles with move in slated in early 2018. Also included are funds for the completion of the Elks Lane environmental work as well as the beginning of the design and engineering work. Smaller items included are specialized maintenance tools awaiting FTA approval for the budget amendment, as well bus stop improvement funding.
8. FTA Section 5307 South County (\$256,560): for the completion of the Elks Lane environmental work as well as the beginning of the design and engineering work. This amount also includes funding for capital bus repairs.

Expenditure Changes

1. Facility Improvements (\$32,540): for facility security improvements at the current transit center and at the new operations facility.
2. Maintenance Equipment (\$7,280): for license fees associated with the maintenance software.
3. Specialized Maintenance Tools (\$33,500): for maintenance tools that staff is currently waiting on FTA to proceed with a budget amendment.
4. Vehicle ITS (Intelligent Transportation System) (\$77,640): carryover unspent amount from FY16-17.
5. Bus Stop Improvements (\$260,370): carryover unspent amount from FY16-17, which includes improvements to the current transit center on Osos Street as well as start on the improvements identified in the bus stop improvement plan.
6. Bus Rehabilitation (\$126,000): carryover funds for capital repairs to the fleet.
7. Elks Lane Project (\$1,025,380): carryover unspent amount from FY16-17 and new SB1 funds for the completion of the Elks Lane environmental work as well as the beginning of the design and engineering work.

8. Paso Property Improvements (\$859,830): carryover unspent amount from FY16-17 based on the timeline for the construction of the new operations facility in Paso Robles with move in slated in early 2018.

The net effect for the above referenced budget adjustments results in no financial impact on the jurisdictions.

Staff Recommendation

Approve the budget amendment as indicated in the staff report.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
PROPOSED AMENDED CAPITAL REVENUE BUDGET FOR 2017/2018**

	2015/2016 COMBINED ACTUAL	2016/2017 AMENDED CAPITAL BUDGET	2016/2017 ADOPTED SLOCAT BUDGET	2016/2017 ADOPTED N. COUNTY BUDGET	2017/2018 ADOPTED CAPITAL BUDGET	2017/2018 AMENDED CAPITAL BUDGET	2017/2018 ADOPTED SLOCAT BUDGET	2017/2018 ADOPTED N. COUNTY BUDGET	2018/2019 PROJECTED CAPITAL BUDGET	2018/2019 PROJECTED SLOCAT BUDGET	2018/2019 PROJECTED N. COUNTY BUDGET
FUNDING SOURCES:											
1. CAPITAL PROJECTS RESERVE	525,119	499,850	48,690	4,170	547,363	821,573	8,690	40,330	621,400	80,280	98,210
2. LESS REQUIRED RESERVES FOR FISCAL YEAR	525,119	499,850	48,690	4,170	547,363	821,573	8,690	40,330	621,400	80,280	98,210
3. CAPITAL PROJECTS RESERVE	552,710	346,790	8,690	40,330	598,173	598,173	80,280	98,210	530,800	151,870	156,090
4. TOTAL	552,710	346,790	8,690	40,330	598,173	598,173	80,280	98,210	530,800	151,870	156,090
5. FUND BALANCE AVAILABLE	(27,591)	153,060	40,000	(36,160)	(50,810)	223,400	(71,590)	(57,880)	90,600	(71,590)	(57,880)
NON TDA SOURCES											
6. STATE TRANSIT ASSISTANCE (STA)	752,174	486,530	-	36,160	410,000	410,000	71,590	57,880	410,000	71,590	57,880
7. LOW CARBON TRANSIT OPERATIONS PROGRAM (LCTOP)	-	291,300	-	-	-	264,040	-	-	-	-	-
8. PROPOSITION 1B FUNDING - SAFETY & SECURITY	271,262	765,240	-	-	100,000	210,180	-	-	-	-	-
9. STATE TRANSIT ASSISTANCE (STA) SB1 AUGMENTATION	-	-	-	-	-	441,290	-	-	-	-	-
10. PROPOSITION 1B FUNDING - BUS REPLACEMENT	-	-	-	-	-	-	-	-	330,730	-	-
11. CONGESTION MITIGATION AND AIR QUALITY (CMAQ)	-	-	-	-	-	-	-	-	396,000	-	-
12. RURAL TRANSIT FUND (Capital)	-	55,990	-	-	-	-	-	-	-	-	-
13. FEDERAL TRANSIT ADM (FTA) (Section 5307) - San Luis Obispo	115,047	229,650	-	-	133,330	337,090	-	-	339,970	-	-
14. FEDERAL TRANSIT ADM (FTA) (Section 5309) - State of Good Repair	52,457	-	-	-	-	-	-	-	-	-	-
15. FEDERAL TRANSIT ADM (FTA) (Section 5339) - Bus and Bus Facilities	44,180	96,190	-	-	-	79,220	-	-	873,210	-	-
16. FEDERAL TRANSIT ADM (FTA) (Section 5311f)	-	-	-	-	-	-	-	-	-	-	-
17. FEDERAL TRANSIT ADM (FTA) (Section 5307-North County)	115,047	731,410	-	-	188,890	982,170	-	-	398,310	-	-
18. FEDERAL TRANSIT ADM (FTA) (Section 5307-South County)	115,047	664,150	160,000	-	133,330	389,890	-	-	339,970	-	-
19. SUB TOTAL	1,465,214	3,320,460	160,000	36,160	965,550	3,113,880	71,590	57,880	3,088,190	71,590	57,880
20. TOTAL FUND BALANCE & NON TDA FUNDING	1,437,623	3,473,520	200,000	-	914,740	3,337,280	-	-	3,178,790	-	-
21. NET TDA REQUIREMENTS	-	-	-	-	-	-	-	-	-	-	-
22. TOTAL FUNDING SOURCES	1,437,623	3,473,520	200,000	-	914,740	3,337,280	-	-	3,178,790	-	-
23. FUNDING USES:											
24. CAPITAL	1,237,027	3,272,920	200,000	-	714,140	3,136,680	-	-	2,967,120	-	-
25. LOAN PAYDOWN	200,596	200,600	-	-	200,600	200,600	-	-	211,670	-	-
26. TOTAL FUNDING USES	1,437,623	3,473,520	200,000	-	914,740	3,337,280	-	-	3,178,790	-	-

Capital Expenditures	Actual Capital Expenditures FY 2015-16	Amended Capital Budget FY 2016-17	Adopted Capital Budget FY 2017-18	Amended Capital Budget FY 2017-18	Projected Capital Budget FY 2018-19	Projected Capital Budget FY 2019-20	Projected Capital Budget FY 2020-21	Projected Capital Budget FY 2021-22
Capital/Studies:								
Computer System Maintenance/Upgrades	31,964	62,250	52,220	52,220	31,830	33,420	35,090	36,840
Miscellaneous Capital								
Facility Improvements	17,678	57,540	34,730	32,540	17,250	-	19,840	-
Maintenance Equipment		57,690	-	42,010	-	-	-	-
Rotary Lift/Wireless Lift		-	-	-	-	-	-	-
Passenger Protection 1300 buses		8,400	-	-	-	-	-	-
Specialized Maintenance Tools		33,500	-	33,500	34,340	36,060	-	-
Desks and Office Equipment		10,760	6,600	6,600	-	-	-	-
Radios	4,653	-	-	-	-	-	6,600	-
Vehicle ITS/Camera System	383,370	668,090	85,870	163,510	-	-	-	-
Bus Stop Improvements/Bus Stop Solar Lighting	111,067	277,230	34,730	295,100	36,470	38,290	40,200	42,210
Bus Rehabilitation		126,000	-	126,000	-	-	-	-
RouteMatch Dispatching Software/Call Back System		37,500	-	-	-	-	-	-
Vehicles		60,000	-	-	18,000	-	56,700	63,000
Support Vehicles		-	-	-	1,599,940	1,805,000	631,800	1,326,700
40' Coaches		200,000	-	-	-	-	-	-
Trolley replacement vehicles	244,352	-	-	-	-	880,700	-	-
Cutaway and Dial A Ride Vehicles	406,314	-	-	-	-	555,200	261,300	316,600
Runabout Vehicles	1,199,398	1,762,440	214,150	751,480	2,467,130	3,348,670	1,051,530	1,785,350
Total Capital Outlay								
Loan Pay down								
Elks Lane Project	200,596	200,600	200,600	200,600	211,670	-	-	-
Paso Property Improvements	37,629	710,480	499,990	1,525,370	499,990	499,990	499,990	499,990
-	-	1,000,000	-	859,830	-	-	-	-
TOTAL FUNDING USES	1,437,623	3,673,520	914,740	3,337,280	3,178,790	3,848,660	1,551,520	2,285,340

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

November 1, 2017

STAFF REPORT

AGENDA ITEM: B-2

TOPIC: Agreement between the Regional Transit Authority and Teamsters Local 986

PRESENTED BY: Geoff Straw

STAFF RECOMMENDATION: Approve Agreement between the Regional Transit Authority and Teamsters Local 986

RTAC RECOMMENDATION:

BACKGROUND/DISCUSSION:

Teamsters Local 986 represents the Bus Operators, Mechanics and Utility Workers employed by RTA. The proposed agreement was reached after the RTA and Teamsters met, conferred and negotiated in good faith concerning wages, benefits and other conditions of employment required by the Meyers-Milias Brown Act, as well as the RTA Employer-Employee Relations Policy. The contract term would take effect on January 1, 2018 and would expire on December 31, 2021.

The tentative agreement was ratified by the employees that are represented by the Teamsters on September 19, 2017. In order to implement the collective bargaining agreement, it must now be approved by the Board.

Staff Recommendation

Approve agreement between RTA and Teamsters Local 986.



And

Teamsters Union Local 986

Effective January 1, 2018 to December 31, 2021

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SECTION I – AGREEMENT

This Agreement is made and entered into by and between San Luis Obispo Regional Transit Authority its successors and assigns hereinafter called the "RTA" or the "Company" and General Teamsters, Airline, Aerospace and Allied Employees, Warehousemen, Drivers, Construction, Rock and Sand Union, Local No. 986, affiliated with the International Brotherhood of Teamsters, hereinafter called the "Union".

ARTICLE 1 **Recognition**

SECTION 1. Bargaining – The RTA recognizes the right of its employees to bargain collectively through representatives of their own choice and recognizes the Union as the exclusive representative of all its employees covered by this Agreement. The Union recognizes the powers and duties of the RTA as defined in the RTA Employer-Employee Relations Policy. Jurisdiction of the Union and the appropriate unit for collective bargaining are defined as embracing all operating and maintenance employees included within the classifications of employees as set forth in the wage sections of this Agreement. For the purposes of this Section, to bargain collectively is the performance of the mutual obligation of the RTA and the Union to meet and confer in good faith with respect to wages, hours, and other terms and conditions of employment, or the negotiation of an Agreement, or any question arising thereunder, and the execution of a written contract incorporating any agreement reached if requested by either party.

SECTION 2. Access – Any authorized Union representative on the premises of the RTA during working hours to transact Union business shall not unreasonably interfere with or delay any employee in the conduct of work generally adhering to the principles of communicating with employees. It is understood that the authorized Business Agent of the Union shall notify RTA upon arrival when visiting RTA premises. Union Officials shall have access to RTA's premises during work hours for the purpose of seeing that the provisions of the Agreement are being adhered to. In no event may any union representative interfere with the operation of the Company.

SECTION 3. Meetings – Should the Union desire to discuss with the RTA any general problems not pertaining to grievances, a meeting shall be arranged upon written request at a time mutually agreed upon. Any such meeting may include either employees and/or Union stewards.

SECTION 4. Definitions – When the term “employee” is used in this Agreement, it shall mean an operating or maintenance employee included within the classifications of employees as set forth in the wage sections of this Agreement.

When the term “day” is used in this Agreement, it shall mean those days that the RTA administrative offices are open, generally, Monday through Friday, excluding holidays as set forth in Articles 36 and 42.

SECTION 5. Stewards – The list of names of the two authorized Union stewards shall be given to the Executive Director of the RTA, as well as any change in such list, at least three (3) work days prior to the effective date such authorized representatives assume office. Union stewards shall be bargaining unit employees designated by the Union. Union stewards shall have the right to represent bargaining unit employees during discipline investigations and the grievance procedure. After being coordinated and authorized by management, Union stewards shall be granted reasonable release time to represent employees in rights disputes.

SECTION 6. Union Security – Dues/“Fair-Share” Fees Deduction

A. Membership – Any employee in the unit who is currently or after the effective date of this Agreement becomes a member of Union shall remain a member for the duration of this Agreement. However, during the month of December of any year of this Agreement any member may withdraw from the Union their membership by notifying the RTA and the Union through written cancellation of membership.

B. Representational Fee – All unit employees are subject to the payment of a representation fee, but hereunder shall have the right to object to any part of that fee payable by him or her which is claimed to represent the employee’s additional pro rata share of expenditures by the Union that is in aid to activities or causes of a partisan, political, or ideological nature, or that is applied towards the cost of benefits available only to members of the Union, or that is utilized for expenditures that are not necessarily or reasonably incurred for the purpose of performing the duties incident for meeting and conferring or administering the Agreement.

C. Dues Deduction – During the term of this Agreement, upon receipt of an executed voluntary written authorization, the RTA shall deduct Union dues from the second pay warrant of the month for employees who are members

of the Union. The form for this purpose shall be provided by the Union and the amounts to be deducted for Union dues shall be certified to the RTA by the appropriate Union official.

Agency Shop

The following agency shop provisions are set forth for informational purposes to generally describe requirements of Government Code section 3502.5 and other applicable laws. If any of the following descriptions are inconsistent with Government Code section 3502.5 or any other applicable law, the provisions of the applicable law shall apply.

1. **Agency Shop** – Agency Shop as used in this Article means an organizational security arrangement as defined in Government Code Section 3502.5 and any other applicable law.
2. **30 Days** – Unless an employee qualifies for an exemption under subsection 8 below, within thirty days after the State Mediation and Conciliation Service's certification of approval of the agency shop election results, each employee shall be required to either become and remain a member of the Union or pay an agency fee to the Union in an amount that does not exceed that which may be lawfully collected.
3. **Payroll Deductions** – Union dues or fees shall be deducted by the RTA from an employee's paycheck on a bi-weekly basis starting the first day of the month following completion of thirty (30) calendar days of employment, subject to the limitations and practices of the RTA's payroll system.
4. **Fee** – As to non-members objecting to the Union spending their agency fee on matters unrelated to collective bargaining and contract administration, the amount of the agency fee charged shall not reflect expenditures which the courts have determined to be non-chargeable, including political contributions to candidates and parties, members only benefits, charitable contributions and ideological expenditures and, to the extent prohibited by law, shall not reflect expenditures for certain aspects of lobbying, ballot measures, publications, organizing and litigation.
5. **Disclosure** – The Union shall comply with applicable law regarding disclosure and allocation of its expenses, notice to employees of their right to object, provision for agency fee payers to challenge the Union's determinations of amounts chargeable to the objecting non-members, and

appropriate escrow provisions to hold contested amounts while the challenges are underway.

6. **Procedure** – The Union shall make available, at its expense, an expeditious administrative appeals procedure to unit members who object to the payment of any portion of the representation service fee. Such procedure shall provide for a prompt decision to be made by an impartial decision-maker jointly selected by the Union and the objecting employee(s). The Union shall make a copy of such a procedure available to non-union member employees and the RTA.

7. **Description** - The foregoing description of permissible agency fee charges and related procedures is included herein for informational purposes and is not intended to change applicable law.

8. **Exemption from Agency Fee Obligations: Religious/Conscientious Objections** - An employee who is a member of a bona fide religion, body, or sect that has historically held conscientious objections to joining or financially supporting public employee organizations shall not be required to join or financially support any public employee organization as a condition of employment. The employee must present a written declaration to the Union, with a copy to the RTA that he or she is qualified for this exemption. The employee will be required to pay agency shop fees to a nonreligious, non-labor charitable fund exempt from taxation under Section 501(c)(3) of the Internal Revenue Code, as designated by the employee from a list designated by the parties. This list will be agreed upon by the Union and the RTA prior to the collection of fees under this article.

9. **Leave Without Pay/Insufficient Earnings** – The employee's earning must be sufficient, after required deductions are made, to cover the full amount of the dues or agency shop service fees. Therefore, when an employee is in a non-pay status for an entire pay period, no withholding will be made to pay for agency fees. In the case of an employee who is in a non-pay status during only part of the pay period, and the salary is not sufficient to cover the full withholding, no deduction shall be made. In this connection, all required deductions have priority over Union dues and agency shop fees.

10. **Rescission of Agency Shop** – An agency shop provision may be rescinded pursuant to the procedures contained in Government Code section 3502.5(d) and as further defined in the RTA Employer-Employee Relations Policy. Rescission elections shall be conducted by the State

Mediation and Conciliation Service using the same procedures utilized for the implementation election.

11. **Union Indemnification** – The Union shall indemnify, defend, and hold the RTA, its governing board, officers, and staff, harmless against any and all claims, demands, suits, orders, or judgments, or any other form of liability that arises out of or by reason of this article, or action taken or not taken by the Union or the RTA under this article. This includes, but is not limited to the RTA attorney's fees and costs.

ARTICLE 2

Assignability

This Agreement shall be binding upon the successors and assigns of the parties hereto, and no provisions, terms or obligations herein contained shall be affected, modified, altered or changed in any respect whatsoever by the consolidation, merger, sale, transfer or assignment of either party hereto, or affected, modified, altered or changed in any respect whatsoever by any change of any kind in the ownership or management of either party hereto or by any change, geographical, or otherwise, in the location or place of business of either party hereto.

ARTICLE 3

Duration

SECTION 1. Notice – This Agreement shall be in effect from January 1, 2018 to December 31, 2021 both inclusive, and from year to year thereafter, except that at the expiration of the contract term or of any renewal thereof either party may terminate the Agreement by giving notice to the other party of its intention to terminate the Agreement or to negotiate changes in its terms.

Said notice shall be in writing and be delivered to the other party not more than one-hundred and twenty (120) and not less than ninety (90) calendar days before the expiration of the contract term or of any renewal thereof. If such notice is given by either party, it shall also contain an offer to meet and confer with the other party for the purpose of negotiating a new contract.

SECTION 2. Impasse – If either party declares impasse, the State Mediation and Conciliation Service and any State agency established to mediate and conciliate disputes within the State shall be notified of the existence of a dispute and requested to mediate said dispute.

ARTICLE 4

Negotiations

SECTION 1. Officers - It is mutually agreed that all business comprehended by this Agreement shall be transacted between the properly accredited officers or agents of the RTA and the duly authorized representatives of the Union.

SECTION 2. List - The Union agrees to furnish the RTA with an up-to-date list of all its authorized representatives and stewards and to immediately notify the Company of any and all changes thereto.

ARTICLE 5

Management

RTA retains, solely and exclusively, all the rights, powers and authority exercised or held prior to the execution of this Agreement, except as expressly limited by a specific provision of this Agreement. Without limiting the generality of the foregoing, the rights, powers and authority retained solely and exclusively by RTA and not abridged herein include, but are not limited to, the following: To manage and direct its business and personnel; to manage, control and determine the mission of its departments, building facilities and operations; to create departments and facilities in whole or in part; to direct the work force; to increase or decrease the work force and determine the number of employees needed; to hire, transfer, promote and maintain the discipline and efficiency of its employees; schedules of operation and reasonable work load; to specify or assign work requirements; to schedule working hours and shifts; to determine the type and scope of work to be performed and the services to be provided; to determine the methods, processes, means and places of providing services, and to take whatever action necessary to prepare for or operate in an emergency.

ARTICLE 6

RTA Rules

SECTION 1. Enacting New RTA Rules – It is mutually agreed that reasonable rules and regulations made by the RTA, not in conflict with the provisions of the Agreement or any Federal, State, County or City law, are necessary to the efficient operation of the equipment and maintenance of RTA's property. For non-safety related rules, the RTA will transmit an electronic copy to the Local Union Office two (2) business days in advance.

SECTION 2. Removal of Obsolete Rules – The RTA shall make a good faith effort to update, document and remove any rule, regulations, policies, procedures, or bulletins that are in conflict with each other or with the agreement.

SECTION 3. Exercise of Good Judgment – The Company operates public transportation services in a legal and prudent manner, and management will never require any employee to break the law, act unethically or take unreasonable risks. It shall not be a violation of this Agreement, or cause for disciplinary action, where employees reasonably refuse to operate equipment or a vehicle when such operation constitutes a violation of any state or federal rules, regulations, standards or orders applicable to commercial motor vehicle safety or health, or because of the employee's reasonable apprehension of serious injury to himself/herself or the public due to the unsafe conditions as set out in any state, or federal rules, regulations, standards or orders applicable to commercial vehicle safety or health.

For the purposes of this Article, the term "reasonable" shall mean the reasoning and actions of an ordinary, prudent person who normally exercises due care while avoiding extremes of both audacity and caution.

ARTICLE 7

Grievances and Grievance Procedures

SECTION 1. Definition – A grievance is defined to be any complaint or dispute arising between the parties of this Agreement as to working conditions or as to the application of this Agreement between the parties.

SECTION 2. Grievance Procedure – In the settlement of grievances under the terms of this Agreement, the following procedure shall be observed:

A. No grievance shall be entertained or considered unless it is presented in the following manner:

Step 1: Verbal – The employee or the Union shall confer with the employee's Lead Supervisor or Maintenance Supervisor, or his/her designated representative, within ten (10) work days after an incident occurs which causes the employee know, or by the exercise of reasonable diligence could have allowed the employee to know, the facts upon which the grievance is based. The Lead Supervisor or Maintenance Supervisor, or his/her designated

representative, shall give his/her answer to the employee not later than five (5) work days after the conference with the employee.

Step 2: Written – If the answer of the Lead_Supervisor or Maintenance Supervisor, or his/her designated representative, in Step 1 is unsatisfactory, the grievance shall be presented in writing and contain a statement of the pertinent facts and the provisions of the Agreement allegedly violated and remedy sought to the Manager of Operations or Manager of Maintenance and Facilities within ten (10) work days after the answer in Step 1.

Step 3: Director – If the grievance is not resolved within five (5) work days after the receipt of the written grievance in Step 2 by the Manager of Operations or Manager of Maintenance and Facilities , the grievance shall automatically move to the Executive Director or his/her designated representative.

- A. Any grievance presented in a due and timely manner as hereinabove provided shall be taken up by the officers or committee of the Union and the Executive Director or his/her designated representative or designated officials of the Company within ten (10) work days of the completion of Step 2, and the Company's decision will be in writing to the Union.
- B. Within fifteen (15) work days thereafter such grievance shall be settled or arbitration shall have been demanded as hereinafter provided. If not so settled and if arbitration shall not have been so demanded by either the RTA or the Union, such grievance shall be considered waived.

SECTION 3. Time Waiver – The time limits herein specified shall be calculated by excluding Saturdays, Sundays and holidays. Time limits may be waived by mutual agreement. Grievances submitted dealing with a Notice of Intent to Discipline are to be filed within 5 work days and will be adjudicated according to the steps detailed in Article 17 Section 6.

SECTION 4. Notice – For all purposes hereunder, notices will be considered sufficiently served when mailed postage prepaid by certified mail, or when hand-delivered, or electronic transmission (e-mail or facsimile with verification), to the Executive Director, or his/her designated representative, at 179 Cross Street, San Luis Obispo, CA 93401 for service upon the RTA.

ARTICLE 8

Arbitration

In the event any grievance cannot be adjusted as set forth in Article 7 hereof, and either party elects to go to arbitration, such party may do so by sending written notice of such desire to the other party within a period of fifteen (15) work days after the date of the delivery of the decision of the Company as provided in Article 7, Section 2, paragraph A, hereof.

- A. **Selection of an Arbitrator** – An arbitrator shall be selected from a list of seven (7) names obtained from the Federal Mediation and Conciliation Service. Such a list shall be one mutually requested by the parties to this Agreement, and shall be used until such time that either party requests that a new list be requested from the FMCS. The arbitrator shall be selected by the parties alternately striking a name from the list until only one name remains. The Union shall strike the first name.
- B. **Arbitrator's Jurisdiction** – The jurisdiction and authority of the arbitrator and his opinion and award shall be confined exclusively to the interpretation and/or application of this Agreement. He shall have no authority to add to, detract from, alter, amend, or modify any provision of this Agreement. The arbitrator shall not hear or decide more than one (1) grievance without the mutual consent of the Company and the Union. The written award of the arbitrator on the merits of any grievance adjudicated within his jurisdiction and authority shall be final and binding on the aggrieved employee, the Union and the RTA.
- C. **Fees and Expenses of Arbitration** – The expenses of the arbitrator and hearing room will be equally shared between the RTA and the Union. All other costs shall be borne by each party.

ARTICLE 9

Reopening Clause Under Wage Section

Notwithstanding the provisions of Article 3, in the event the RTA, or any part of it, is acquired by purchase, lease or otherwise, or operated, by any successor, and in the event that the successor so acquiring or operating the RTA pays a higher basic hourly, daily, or weekly wage rate, including the product of any cost of living escalator provision, to any employee or employees performing comparable work to the work performed by employees under the terms of this Agreement, the Union may, after the

effective date of such purchase, lease or otherwise, reopen the wage provisions of this Agreement upon thirty (30) calendar days notice in writing.

ARTICLE 10

Changes of Classifications

Should changes be made in the maintenance and operation of the RTA's equipment creating classifications of employees not contemplated or covered by this Agreement, the parties hereto agree to negotiate supplemental agreements covering such necessary changes in classifications.

ARTICLE 11

Bulletin Boards

Bulletin boards shall be provided for the exclusive use of the Union on RTA's property for the proper display of official bulletins, notices, etc.; provided that in order to entitle such bulletins and notices to be posted on the board they shall be attested to by the proper officers of the Union and have the official seal attached.

ARTICLE 12

Waivers

The Company's failure to exercise any function or right hereby reserved to it, or its exercise of any function or right in any particular way shall not be deemed a waiver of its right to exercise such function or right, nor preclude the Company from exercising the same in some other way not in conflict with the express provisions of this Agreement.

ARTICLE 13

Warranties

SECTION 1. Performance – Each of the parties hereto warrants that it is under no disability of any kind that will prevent it from completely carrying out and performing each and all of the provisions of the Agreement, and further that it will not take any action of any kind that will prevent or impede it in the complete performance of each and every provision hereof.

SECTION 2. Signatory –The individuals signing this Agreement in their official capacity hereby warrant their authority to act for their respective parties.

SECTION 3. Complete Agreement – This Agreement sets forth the full and entire understanding of the parties regarding the matters set forth herein, and any other prior or existing understanding or agreements by the parties, whether formal or informal, regarding any such matters are hereby superseded or terminated in their entirety.

Unless otherwise specifically set forth herein, it is agreed and understood that each party hereto voluntarily and unqualifiedly waives its right to negotiate, and agrees that the other party shall not be required to negotiate, with respect to any matter covered herein.

ARTICLE 14

Check Off

SECTION 1. Payroll Deduction - The RTA agrees to deduct from the pay of each member of the Union employed by the RTA, such dues, fees and assessments as may be levied by the Union. Payment will be made by RTA to the Union within ten work days – excluding holidays – following the second payday in each calendar month. The Union shall furnish to the RTA at least five (5) work days prior to the last day of each calendar month a list of all bus operators employed by the Company and belonging to the Union, and a separate list of all maintenance employees of the Company belonging to the Union, together with the amount of the deductions to be made from the next pay check of each person shown on such lists. The RTA agrees to remit to the Union such lists. The RTA agrees to remit to the Union within ten work days following the second payday in each calendar month the aggregate amount of the deduction shown on the lists so furnished during the immediate preceding calendar month.

SECTION 2. Request for Deduction - The individual authorization for the deduction of regular monthly membership dues shall be worded as follows: "REQUEST FOR DEDUCTION OF TEAMSTERS LOCAL 986 MEMBERSHIP DUES" I,

_____, the undersigned employee of RTA, do hereby individually and voluntarily authorize and request the said Company to deduct such dues, fees and assessments of Local 986 from any wages due to me during the second pay period of any month. I further authorize the said RTA to base its deductions on a list furnished to it each month by the financial secretary of said Local No. 986 showing such dues, fees and assessments to be deducted from the wages of each of its members. Whenever such list indicates that the

amount of the membership dues has been changed, it must be accompanied by a certificate of the financial secretary of the Union that such change in the amount of membership dues has been brought about in accordance with the constitution and bylaws of the Union.

All sums so deducted are to be transmitted by the RTA to the financial secretary of Local No. 986.

Dated this _____ day of _____ 20_____.

Employee

SECTION II – POLICIES AND BENEFITS

ARTICLE 15

Probationary Period

All new employees shall be on probation for a period of one hundred eighty (180) calendar days after the successful completion of the training period. Such probationary period shall constitute a trial period during which the RTA is to judge the ability, competency, fitness and other qualifications of new employees to do the work for which they were employed. All rights, benefits and privileges, including the application of grievance and arbitration procedure, shall be applicable to probationary employees; except the judgment of the RTA regarding a probationary employee's qualifications shall not be subject to the grievance and arbitration procedure.

ARTICLE 16

Seniority

SECTION 1. Definition – All seniority shall be proper seniority and shall be governed by the date and hour of employment with the RTA. Seniority of service with the RTA and qualifications which shall be jointly determined by the Company and the Union shall govern in run bidding, promotions, layoffs, and re-employment of qualified employees. This Section and Article shall apply only to those job classifications which are included in the terms of this Agreement. For purposes of job bidding, seniority is defined as the amount of time that the employee has been continuously employed either by the RTA (August 1, 2009) or the amount of time the employee was continuously employed by RTA's previous contractors and RTA immediately thereafter. For purposes of wages and all other employee benefits, seniority is defined as time employed by the RTA, August 1, 2009.

SECTION 2. Transferring – Employees transferring from the operating department to the maintenance department or from the maintenance department to the operating department, with the consent of the RTA and the Union, may bid during the interim period between regular sign-ups only for open or vacant shifts.

SECTION 3. Effect of Transfer on Seniority – No change in classification of an employee, whether within any one of the main classifications or from one main classification to another, shall cause any loss in the seniority of such employee.

SECTION 4. Procedure – In the event of a changed classification, any employee found to be unqualified shall be restored to his/her former position without loss of seniority. The retention of an employee beyond forty-five (45) calendar days, upon completion of training, in such changed classification shall be deemed an acceptance of his/her qualifications by the RTA. Employees who have been promoted and have retained their new classifications more than forty-five (45) calendar days beyond training but whose job is subsequently eliminated by a reduction in staff or for other reasons, shall be permitted to resume his/her position on the seniority list in his/her former job classification.

ARTICLE 17

Discipline and Discharge

SECTION 1. Compliance – Employees shall be in compliance with all rules, regulations, policies and procedures, verbal directives, bulletins, and instructions provided by RTA. Ignorance of the aforementioned will not be accepted as a valid reason for failing to comply.

A written complaint may be entered into an employee's personnel file provided it is properly investigated and the RTA issues an adverse notation. In the event a verbal complaint is made against an employee, the RTA shall first reduce such verbal complaint to writing. A copy of the complaint will then be furnished to the employee. In the event the employee disputes the complaint, he or she shall submit a written response within five business (5) days. The complaint, however, shall not be used for disciplinary or discharge purposes unless it results in an adverse notation.

SECTION 2. Discipline For Cause – No employee will be disciplined, discharged, suspended, nor will adverse entries be made in a personnel record, except for just and sufficient cause. "Discipline" shall mean a documented verbal or written warning, loss of pay, suspension, demotion, or termination of regular employment. Documented verbal warnings, as well as written warnings that do not include suspension without pay, are subject to the grievance process.

SECTION 3. Employee Records – In cases of disciplinary action for a generally unsatisfactory record, positive or negative notations on an employee's record more than eighteen (18) months old as of the date of the infraction under investigation, will not be taken into consideration or be admissible as evidence.

SECTION 4. Notice of Intent to Discipline – RTA agrees that it will notify the employee and the Union, in writing, within fifteen (15) work days from the date of knowledge, that a specific employee is responsible for the occurrence forming the basis for the contemplated discipline or discharge of its intention to render discipline. No employee will be disciplined, discharged or suspended unless a copy of the precise and complete charges against the employee is furnished the employee, with an electronically-transmitted copy to the Union, within fifteen (15) work days. Time limits set by this paragraph may be extended during any period where an active criminal investigation is underway related to suspected theft or embezzlement.

SECTION 5. Right to Union Representation – Employees shall have the right to Union representation at any investigatory interview or hearing which RTA conducts for the purpose of determining the possibility of disciplinary action against the employee, provided the employee makes a clear and timely request for representation to the RTA representative conducting the investigation, and the Union provides a representative in a reasonable time.

SECTION 6. Hearing Process – Employees shall have the exclusive right to request a Skelly hearing on the charges within five (5) work days of receipt of the charges and intent to impose discipline. Failure to request a hearing within five (5) work days after receipt of the charges will be a forfeiture of the right to a hearing, provided, however, for good and sufficient cause, the time limitation to answer the charge may be extended by RTA. The hearing shall be held within ten (10) work days of the date the request for a hearing is received by RTA. An employee who has been notified of RTA's intention to render discipline shall be entitled to a fair and impartial hearing by an RTA representative not directly involved with the investigation, who will serve as the Hearing Officer.

SECTION 7. Employee Review of Facts – During investigation hearings, the employee and the Union representative will be allowed to question all pertinent and present witnesses, and to read all papers and view evidence pertaining to the charges.

SECTION 8. Written Decision – The Hearing Officer shall render a written decision to the employee's supervisor within three (3) work days, following completion of the hearing. The employee's supervisor will then issue a final determination notice that includes a copy of the Hearing Officer's written decision within ten (10) work days of the hearing. That determination notice shall be provided to the employee in-person, via interoffice mail system or via U.S. Postal Service first-class certified mail, with an electronic copy

provided to the Union. The employee shall then have up to five (5) work days from the date the determination notice was received to protest the decision, and RTA will provide a second-level appeal hearing within ten (10) work days.

SECTION 9. Appeal of Written Decision – If an appeal hearing is requested, it will be conducted within ten (10) work days by RTA's Executive Director (or his designated representative), who will serve as the Appeal Hearing Officer. Following the appeal hearing, the Appeal Hearing Officer will render a written decision within fifteen (15) work days, and this notice shall be provided to the employee in-person, via interoffice mail system or via U.S. Postal Service first-class certified mail, with an electronic copy provided to the Union.

SECTION 10. Major Offenses – Violations of the following rules are considered major offenses and shall be grounds for suspension with pay pending investigation:

- A. The use or possession of alcohol, while on duty.
- B. The sale, offer to sell, purchase, use, manufacture, transfer or possession of illegal drugs or substances, or legal prescription drugs illegally obtained or not used as specifically prescribed. The use of legal drugs, at any level, or in a manner, combination or quantity that hinders an employee's ability to perform the job is prohibited. Additionally, no employee shall bring drug paraphernalia onto RTA property or into RTA equipment or vehicles.
- C. Refusal to submit to a drug or alcohol test.
- D. Falsifying a report, timesheet/timecard or a certificate or declaration of injury or sickness.
- E. The use, threatened use, and/or possession of weapons are prohibited. They are not to be on the person of any employee during working hours or while on RTA property. Weapons include, but are not limited to: guns, knives, edged objects, stun guns, mace, or any instrument used to inflict harm or injury. Possession of a pocket knife or utility tool with a blade length of less than two (2) inches is permissible for personal use. The carrying of pepper spray while on duty is prohibited unless written permission is granted.
- F. Theft.
- G. Conviction of a felony or Driving Under the Influence (DUI) on or off duty. Employees failing to report to Dispatch a DUI arrest prior to starting his or her next scheduled shift is considered a major offense.
- H. Lewd or lascivious behavior while on or off duty and while in RTA uniform.

- I. Failure to immediately report a vehicle collision or safety incident that involves an RTA vehicle or property.
- J. Falsifying a vehicle collision or safety incident report that involves damage to an RTA vehicle, another vehicle, RTA property, a fixed object or involving bodily injury, whether suffered by the RTA employee involved in the vehicle collision or safety incident or another person and whether actually suffered or claimed to be suffered.
- K. Job Abandonment: Defined as failure to contact RTA Dispatch or an RTA Supervisor for two (2) or more consecutive calendar days of unauthorized absence without a reasonable justification. A reasonable justification includes emergency medical treatment, hospitalization, automobile collisions, and schedule failure of public transportation, acts of God or natural disasters.
- L. Racial harassment or sexual harassment or other behavior of a discriminatory nature.
- M. Knowingly driving an RTA vehicle without a valid, proper California driver's license (including appropriate endorsement) or with a suspended or expired license or DOT medical card. It is the employee's responsibility to maintain a valid license and current DOT medical card at all times while in the employ of RTA.
- N. Vandalism or willful damage to RTA property or equipment, or to another RTA employee's property or equipment while on RTA premises.
- O. Fighting or any physical violence on RTA property or while on duty except to prevent personal injury.
- P. Involvement in any one preventable vehicle collision or safety incident that results in death or serious bodily injury ("serious bodily injury" means an injury which consists of a physical condition that creates a substantial risk of death, loss of a body member, organ or paralysis) that is caused by the employee's negligence. The employee will be considered to have been negligent if as a result of such a vehicle collision or safety incident he/she is determined to have violated any local, state, or federal law in connection with the collision/incident.
- Q. Fueling a personal vehicle using an RTA fueling resources without documented authorization from a Lead Supervisor, Manager or Director.
- R. A bus operator knowingly starting and/or removing an RTA vehicle from RTA property that is "red-tagged" (unable to be used for any reason).
- S. The use of cellular telephones, pagers, radios, MP3 or other portable music or video players, including the use of peripheral equipment such as earphones, earbuds, "Bluetooth" equipment and other hands-free devices while operating an RTA vehicle.
- T. Allowing an unauthorized person to operate an RTA vehicle.

U. Dishonesty, providing false or misleading statements, or attempting to hide facts that may have led to the root cause of an incident under investigation.

SECTION 11. Suspension and Administrative Leave – Except as provided in Section 9 herein, RTA will not suspend or remove from service any employee until the completion of an investigation and the discipline is prescribed. However, employees may be withheld from active service and placed on paid administrative leave and suffer no loss of pay until the investigation is complete. An employee shall be compensated at his/her rate of pay. An employee who has been suspended and not returned to duty shall be handled in accordance with Section 4 of this Article.

SECTION 12. Suspension To Protect the Public Safety – RTA shall have the right to suspend any employee for a period not exceed three (3) work days with pay for any act or omission of the employee of such a nature that RTA deems that it would be detrimental to the public's safety to retain the employee on duty status. Within three (3) work days, RTA shall either commence proceedings as set forth in Section 4 herein, or return the employee to full duty status. In the event the employee is returned to duty state without formal proceedings, or is found not to be at fault, he or she shall be entitled to such pay and benefits from the date of suspension as would have accrued had the employee not been suspended.

SECTION 13. Discipline for Non-Major Offenses – Notwithstanding the major violations enumerated in Section 9 herein, RTA may impose discipline for violations of rules, regulations, policies and procedures, orders, bulletins and instructions in accordance with Section 4.

SECTION 14. Passenger Behavior – Passenger behavior on RTA buses and facilities is governed by RTA's Passenger Code of Conduct. Violations of that policy, as well as any criminal sanctions identified in California Penal Code 640, may result in denial of RTA Service.

Passenger violations of RTA's Passenger Code of Conduct will allow Bus Operators to call for assistance from an RTA Supervisor. Any behavior that is perceived by the Bus Operator to risk imminent damage to RTA property or personal injury will allow a Bus Operator to inform RTA Dispatch that he or she is ceasing service and seeking assistance from local police. RTA will not discipline a Bus Operator for ceasing service and calling local police when an imminent threat occurred.

ARTICLE 18

Public Notices

No public notice shall be posted relative to errors, shortages, or mistakes which have been made by individual employees covered by this Agreement.

ARTICLE 19

Promotions

Any employee covered by this Agreement, who is promoted to a position not included within the scope of this Agreement, shall within ninety (90) calendar days of such promotion determine if he/she shall continue on such promotion or return to his/her previous job. Employees who elect to remain in such new position shall forfeit all departmental seniority. Provided, further, that any employee who is promoted a second time, will immediately forfeit all departmental seniority.

ARTICLE 20

Layoffs

In the event layoffs become necessary, such layoffs shall be in inverse order of seniority of the classification affected. When a vacancy or vacancies occur thereafter, the RTA shall notify the Union within five (5) working days as to such vacancy or vacancies and such laid-off employee or employees shall be rehired upon a basis of seniority and their seniority restored, provided they report for duty within a period of ten (10) calendar days after the receipt date of notification of recall by the RTA in the form of registered (certified) mail. This notification will be mailed to the last known address of the employee which is on file with the RTA. In the event no laid off employees report within the time specified above, the RTA shall be free to hire a new person or persons to fill the vacancy or vacancies. Persons employed by the RTA for a period of thirty (30) calendar days or more shall receive at least fourteen (14) calendar days notice of any layoff.

ARTICLE 21

Physical Examination

SECTION 1. Required – The Company may require any of its employees to submit to a physical examination by a physician duly licensed to practice as such to determine fitness for duty.

SECTION 2. Physician – The examining physician shall be selected by the RTA and the cost of such examinations shall be paid by the RTA.

SECTION 3. Fitness for Duty – As a condition of continued employment with the RTA, any physical examination provided for above must reveal the physical and mental fitness of the employee involved to perform his/her duties.

SECTION 4. Drug and Alcohol Free Workplace – RTA's goal is to provide for a healthy and safe work environment and therefore maintain a drug and alcohol free workplace as defined in the RTA Drug Free Workplace Policy and Program. Employees shall be subject to post accident, random and reasonable suspicion drug and alcohol testing as set forth in the FTA and US DOT 49 CFR Part 655 and 49 CFR Part 40 as amended and the RTA Drug Free Workplace Policy and Program.

SECTION 5. Unfitness – Should any physical examination provided for above reveal physical or mental unfitness caused by disease, defects or disabilities of a temporary and curable nature, and the employee involved is willing to have the cause or causes of such unfitness treated and rectified, then and in that event, depending upon the particular circumstances of each case:

- A. The employee involved may continue working while undergoing medical treatment if the examining physical shall certify to his/her ability to do so safely.
- B. The employee involved shall be taken out of service and given a leave of absence for the purpose of undergoing medical treatment until such time as the examining physician shall certify to his/her physical and mental fitness to perform again the duties for which he/she was employed and the seniority of the employee involved shall be unaffected thereby. Any employee on leave of absence because of physical or mental unfitness to perform his/her duties may be required to supply the RTA with a physician's report covering his/her condition at least once every thirty (30) calendar days.

SECTION 6. Paid Time – Any employee when required by the RTA to be relieved from duty for the purpose of taking a physical examination shall be paid for the time lost in taking such physical examination.

SECTION 7. DMV Posting – For the purpose of the Department of Motor Vehicles physical examination, the Company will provide a list of authorized examining doctors that will complete the employee's physical examination at no cost to the employee. If the employee chooses to use a doctor that is not on the Company-provided list, the employee will be solely responsible for the costs of the physical examination. On the first day of each month, the RTA shall post a list of employees who are due to take the Department of Motor Vehicles physical examination during the following month. For the purpose of interpretation of this Section, any and all examinations required by the Department of Motor Vehicles, California Highway Patrol, or any other authoritative agency, will be included.

ARTICLE 22

Issuance of Pay Checks

SECTION 1. Pay Day – The RTA will make every effort to issue the payroll every other Friday starting no later than 5:00 a.m. In the event a holiday falls on a Friday, the RTA will make every effort to issue the payroll on the previous day. However, should a system breakdown occur, the payroll will be issued no later than the following Wednesday. No loss in pay will result should this occur.

SECTION 2. Deductions – All deductions will be shown on the pay check stub for social security, disability insurance, group insurance, coveralls, uniforms, union dues, withholding tax and dependent insurance. Pay check stubs shall also show the amount of time paid for straight time, overtime, vacation, student instruction, and any changes in classifications and rates of pay.

SECTION 3. Termination Pay Check – If an employee is terminated, the employee must return to RTA all items issued by RTA to the employee when receiving his or her last pay check. Such items include uniforms, keys, fuel cards, employee badge and other equipment. If an employee resigns, retires or gives notice, he will return all RTA property his last day worked.

ARTICLE 23

Lost and Found Articles

Lost and found policies and procedures are governed by California Civil Code 2080.1. Each employee shall report to RTA dispatch each article found on RTA property and not claimed by the losing passenger before such employee completes his/her shift on the day upon which such article is found. If the

RTA Lead Operations Supervisor determines that the value of the property is greater than \$100, the item will be turned over to the San Luis Obispo Police Department; all other non-perishable items shall be held by RTA for a minimum 90-day period, after which the item will be donated to a local charity or thrown away.

ARTICLE 24

Health, Dental, Vision and Life Insurance

SECTION 1. Group Plan – The Company shall provide the administration of the Group Insurance Plan.

SECTION 2. Premiums:

- A. The RTA agrees to pay for a portion of the provision of health, dental, and vision insurance for the life of this contract for full time employees. Should the employee wish to cover dependents or spouse, they shall do so at their expense. Eligible full-time employees shall be any full time employee as defined in Article 31 Section 1 and Article 40 Section 1.
- B. For Full-Time employees, RTA will pay for 93% of the monthly premiums to provide the base healthcare plan (as of January 1, 2017, this plan is known as the "Solutions PPO Plan") for the employee, as well as 93% of the Anthem Blue Cross Dental Complete and Blue View Vision plans. For Part-Time/Health-Benefited employees, RTA will pay for 93% of the monthly premiums to provide the base healthcare plan for the employee. The employee will be responsible for the remaining 7%, as well as 100% of the additional monthly premiums should the employee choose a richer medical plan and/or to cover a spouse/dependents. For example, based on January 1, 2017 rates, a Full-Time employee who has selected the Solutions PPO Plan will pay \$40.98 per month, while an employee who has selected the Classic PPO Plan will pay \$132.40 per month. Employees who choose the Affordable Care Act-qualifying healthcare plan option (as of January 1, 2017, known as the "HSA Plan") would not be required to contribute toward the monthly medical/dental/vision premium.
- C. The RTA may change insurance carriers at any time, as long as a comparable level of insurance benefits is maintained.

SECTION 3. Incidental Benefit for Opting Out:

- A. RTA-designated full-time benefited employees who can demonstrate during Open Enrollment that they have ACA-qualifying Medical benefits, as well as Dental and Vision Benefits, through another means and who do not elect to receive Medical, Dental and Vision Benefits through RTA may "opt out" of these benefits and shall receive an incidental payment of \$175 monthly in lieu of the contribution as defined above.
- B. Full-time benefited and/or Part-Time/Health-Benefited employees who can demonstrate during Open Enrollment that they have ACA-qualifying Medical Benefits through another means and who do not elect to receive Medical Benefits through RTA may "opt out" of the medical benefit and shall receive an incidental payment of \$125 monthly in lieu of the contribution as defined above.

ARTICLE 25

Robbery Reimbursement

The loss of any employee's property resulting from a holdup, robbery, vehicle collision or assault on the employee which occurs while the employee is on duty shall be reimbursed by RTA up to \$500 per occurrence, provided a police report that details all stolen or damaged items is filed and a copy provided to RTA. Such reimbursement shall be paid upon submission of replacement receipt that clearly portrays the employee's actual out-of-pocket costs for replacement.

ARTICLE 26

Leaves of Absence

SECTION 1. Leaves for Personal Reasons – Leaves of absence without pay for good and sufficient reason will be granted for a period not to exceed thirty (30) consecutive days when practicable.

Employees wishing leave of absence will apply in writing to the Executive Director for approval. The Executive Director will not arbitrarily refuse such approval without good cause. Employees will be notified of the decision on their application for leave of absence within a reasonable time. In cases of proven emergency such leaves will be granted immediately. All RTA property, except annual RTA passes issued to the employees, must be turned in by employees prior to taking their leaves of absence.

An employee who accepts gainful occupation while on leave of absence or sick leave, except as provided in Section 1 of this Article, terminates his/her employment with the RTA unless otherwise mutually agreed to between the RTA and the Union.

SECTION 2. Jury Duty – Should any full-time employee be required to serve on jury duty, said employee will be paid his/her regular straight time rate of pay on a basis of eight (8) hours per day, less jury duty compensation, for a period of time not to exceed one (1) week excluding Saturdays and Sundays in a floating two (2) year period.

SECTION 3. Bereavement Leave – Three (3) eight (8) hour days with pay will be granted upon request of a full-time employee upon the death of a member of his/her immediate family, with no reduction in pay.

The bereavement leave will be applied to the employee's parents, spouse, children, step children, brothers, sisters, grandparents, parents of the spouse, and domestic partners registered with the State of California. Bereavement leave will only be paid if the employee attends the funeral.

Employee's absence on the day before or the day after a holiday due to bereavement leave will not be considered as a basis for non-payment of holiday pay, but will be considered as time worked.

In the event a member is bereaved while he/she is on vacation the appropriate applicable time will be replaced to the vacation bank upon the employee's return, provided written notice is supplied to the Company within ten (10) calendar days after the employee returns.

Proof of death must be supplied by submitting an obituary notice from a newspaper or letter from the mortuary involved signed by the manager.

SECTION 4. Military Leave – Employees entering the military service of the United States shall have leaves of absence up to and including a date ninety (90) calendar days after their official discharge from the service. The provisions of this Article shall apply to those entering the military service coming within the terms of the selective service law. Such absence in the military service shall not be deemed to break the continuity of service for the computation of seniority, rates of pay, and vacation. Employees leaving the Company to enter military service shall be paid in full for all accrued vacation credits at the time of such military service leave.

SECTION 5. Doctors Note – The Executive Director may approve a leave of absence of up to five (5) calendar days due to an employee sickness. However, if an employee is off for more than five (5) calendar days, he/she shall furnish the Company with proper papers showing that he/she has been attended by a physician and a release from his/her physician showing that he/she is able to return to work.

- A. Any Bus Operator returning to work from sick leave shall notify the dispatcher not later than 11:30 a.m. on the date prior to his/her returning to work. Any maintenance employee returning to work from sick leave shall notify the Manager, Maintenance and Facilities, at least one (1) hour prior to the start of his/her shift or assignment.
- B. When it is proven that any employee abuses any RTA leave privilege or if he/she should feign an illness, such employee is subject to discharge at the option of the Company.

SECTION 6. Inability to Perform Essential Job Functions – If an employee becomes unable to perform the essential functions of his or her job through no fault of RTA, an unpaid leave may be granted by the RTA Executive Director. Under this circumstance, the RTA, the employee and a Union representative will meet to collaboratively to determine a schedule for possible return to work. In no case shall the initial schedule be longer than thirty (30) calendar days; it may be extended up to another thirty (30) day period at the discretion of the Executive Director.

ARTICLE 27

Free Transportation

All employees and their immediate family members covered by this Agreement shall be provided free transportation over all RTA fixed route service upon presentation of proper identification to be furnished to the employee by the Company without charge. Immediate family members include the following: spouse, as well as dependent children and/or step-children that live with the employee. Picture identification passes for immediate family members must be renewed annually at the RTA operating facility. Immediate family members must not distract a related Bus Operator while he or she is on-duty, and immediate family members may not ride along more than one round-trip in any four-hour period.

ARTICLE 28

Vehicle Collision and Incident Reporting

SECTION 1. During Shift – Every employee shall make one (1) report for each vehicle collision, or safety incident with injury or the potential for a future claim of a loss, occurring during his/her run or shift, as required by the RTA and such report shall be made at the completion of his/her run or shift.

Employees who are required to make a report shall be allowed twenty (20) minutes for making such report, except that no allowance shall be granted when said report can be made out in time already being paid for on the date report is being made. In the event travel is required the employee shall be paid travel time (scheduled running time) and same shall be subject to the overtime provision. All other reports and interviews required by the RTA shall be paid for at the straight time rate.

SECTION 2. Paid Time – The Company agrees to compensate any employee at the rate of pay prescribed by the terms of this Agreement, less any other compensation received as a result of such appearance, for all time spent in conjunction with any legal matters involving the Company directly or indirectly.

In no event shall an employee be paid less than he/she would have received had he/she worked his/her scheduled or assigned work time, except in the case of a part time operator scheduled for only one piece of work or a tripper.

If such appearance occurs outside the City of San Luis Obispo, the employee will be provided transportation or reasonable travel expense to attend such hearings.

SECTION 3. Written Notice – All vehicle collisions and safety incidents will be reviewed by the RTA. Where a collision or incident is determined to have been preventable, the employee will be notified in writing within ten (10) work days, excluding days off and holidays, from the date of the collision or incident (except in rare cases such as insufficient information for the decision of preventability to be made).

Within five (5) work days of receipt of such notice, the employee may request in writing a review of the decision with the designated Company official.

ARTICLE 29

Compensation While on Leave for an Injury

In the event an employee is injured while on duty in a non-preventable vehicle collision or non-preventable safety incident, resulting in a loss of time, he/she shall: 1) be paid full run, assignment or shift time for the day on which the injury occurs, 2) commencing with the employee's first work day following the day on which the injury occurs he/she shall receive pay equal to one-fifth (1/5) of the maximum weekly compensation amount, as set forth by the Industrial Accident Commission of the State of California, for each of his/her lost work days during the three (3) calendar days immediately following date of injury. If an employee's time off should become covered by other paid compensation, the employee shall reimburse the RTA for the three (3) days paid by the RTA.

ARTICLE 30

Vehicle Collision and Employee Incident Prevention

The Union recognizes that vehicle collision and safety incident prevention work is necessarily incident to the operation of the Company's transportation system and that safety programs, safety meetings and general collision/incident prevention work is mutually beneficial both to the RTA and to its employees. The Union, therefore, agrees that employees must cooperate with the Company in such safety work and attend all safety meetings held and conducted by or for the Company and to take an active part and interest in collision/incident prevention work.

The RTA will rely upon an Accident Review Committee to consider appeals to the Company's initial determination of preventability. The Accident Review Committee shall decide preventability issues only, and shall not determine discipline. The determination of the Accident Review Committee is considered final and may not be appealed. In the event of a tie, the Executive Director will cast the deciding vote.

The Accident Review Committee will be made up of four (4) persons, with an equal number of bargaining unit members and Company members. The Union shall have the right to select the bargaining unit members, who shall serve in a paid capacity at dates and times selected by the Company. A bargaining unit member who has incurred a preventable collision or safety incident within the prior 18 months will not be eligible to be placed on the Accident Review Committee, although current members are "grandfathered

in." The Company and Union may each elect to have an observer present during proceeding.

SECTION III – BUS OPERATOR PROVISIONS

ARTICLE 31

Bus Operations and Operators

SECTION 1. Full-Time Bus Operator – The Company shall have Full Time, Part-Time/Health-Benefited and Part Time Positions as established upon ratification of the collective bargaining Agreement. Positions shall be determined annually through the operating program (budget) adopted by the RTA Board. Full Time Bus Operators shall be any employee who operates a fixed route bus, Runabout, Dial-a-ride or Trolley who bids a scheduled run that regularly works thirty-five (35) hours per week or more. Part-Time/Health-Benefited Bus Operators shall be any employee who regularly works more than thirty (30) hours per week but less than thirty-five (35) hours per week.

When a Full Time Bus operator vacancy occurs, the Company shall post the position for ten (10) calendar days. The position shall be opened for application during this ten (10) day period only. Part-Time/Health-Benefited and Part-Time operators may apply for the position by completing an RTA Application for Promotion to Full Time form and submit the application the application to the Company. Once the job posting is taken down, the position application process shall be considered closed. The RTA shall review all applications and notify all applicants of their status within fourteen (14) calendar days of the closing process.

SECTION 2. Definitions – An "assigned scheduled run" shall be any regular run which is included in the operating schedules of the RTA. An assigned scheduled run shall include full-time fixed route and Runabout runs, part-time fixed route and Runabout runs, trippers and extra board assignments.

SECTION 3. Hours of Work on Assigned Scheduled Runs, Work day and Work Week – All work performed in excess of forty (40) hours per week, shall be compensated for at one and one-half (1-1/2) times the regular hourly rate of pay.

Operators shall be required to report at specific times according to published bid information before their runs are scheduled to leave their respective yards to perform a pre-trip bus/vehicle inspection – whether a full pre-trip

inspection at the bus yard, or a "safety/relief" pre-trip inspection on-route – and this shall be considered work time. Operators shall be paid ten (10) minutes time to perform a post-trip inspection per the prescribed Standard Operating Procedures in the Employee Handbook. This time shall be computed in the scheduled run time paid. Each run shall have a designated "call-in" time that operators shall notify dispatch to confirm their pull-out.

SECTION 4. Extra Schedules – Trippers or portions of runs which are not a part of an assigned scheduled run may be scheduled by the RTA.

SECTION 5. Hours of Work on Regular Runs – The RTA will make every reasonable effort to establish a maximum number of regular runs according to schedules operated and will continue to endeavor to improve the shifts whenever possible.

SECTION 6. Split Run – A split of one-half (1/2) hour, or less, in a regular run shall be computed and paid for as continuous time worked and indicated on the schedule.

SECTION 7. Continuity of Runs – No assigned or extra runs shall have more than one (1) unpaid for intervening period between pieces or work.

SECTION 8. General Sign Up – The RTA shall hold a general sign up one or more times each year.

At a time seven (7) calendar days before a general sign up, the RTA shall make available to the Bus Operators all runs to be bid. An individual page for each posted run shall show the start time of the run, end time, pay time, posting date, run and route designations, schedule hours, days of the week and whether it is full-time or part-time run. The actual bidding shall start on the eighth (8th) day after posting and shall continue each day thereafter, excluding holidays, in the manner described below until the bidding is completed.

A full-time employee seniority list and a part-time employee seniority list shall be posted showing the order in which bus operators shall choose their run. It shall be the responsibility of each bus operator to bid at the designated time he/she is to bid or to leave a proxy statement with the employee's most desirable run as the number one proxy and so on. Bus operators on Leave of Absence status without an RTA-approved return to work date are not eligible to bid. Bus operators returning from leave have bumping privileges per Section 10 of this Article.

If other transit agencies whose operating employees are covered under a valid collective bargaining agreement with the Union consolidate with RTA, those new employees' seniority will be dovetailed into the RTA Seniority List based on each employee's original hire date with the agencies. If those new operating employees are not covered by a valid collective bargaining agreement with the Union, then, both a "Primary RTA Seniority" list and a "Secondary RTA Consolidation Seniority" list will be developed for the first year of consolidation. In addition, a separate set of full-time and part-time bids for the newly consolidated services will be posted seven (7) calendar days before bidding begins for the runs that are exclusively dedicated to the newly consolidated service. Only bus operators on the "Secondary RTA Consolidation Seniority" list may bid on runs in the newly consolidated services. If a newly consolidated run is vacated during a bid, employees on the "Secondary RTA Consolidation Seniority" list will have the first opportunity to fill the vacated run.

The procedure may be changed by mutual agreement between the RTA and the Union.

SECTION 9. Change of Time – In the event the starting or ending time of a regular operator's run is changed twenty (20) minutes or more, or the mileage of his/her run is changed twenty (20) miles or more, he/she will have the privilege of exercising his/her seniority in the selection of a run held by an operator with less seniority provided he/she gives the RTA notice of his/her intention to do so within twenty-four (24) hours after the change became effective. Operators who are bumped by the exercising of this privilege shall have the right to exercise their seniority in the selection of other runs. The change in the assignment of runs selected under the provisions of this Section shall become effective within three (3) calendar days after the new selection is made.

SECTION 10. Bumping – Operators displaced by senior operators, or for any reason deprived of their runs through no fault of their own, may, should they so desire, displace operators junior to them or place themselves on the extra board with their full seniority rights. Operators must exercise privilege of displacing junior operators within five (5) calendar days from date of being displaced, unless prevented by sickness, leave of absence or other good cause, or take their place on the extra board. If, upon the first day of his/her change-over, any operator worked beyond his/her week's maximum by reason of the bump, he/she shall nevertheless, receive only straight time for such day.

SECTION 11. Vacated Runs – A vacated run shall mean a run vacated voluntarily or through suspension, dismissal from service, leave of absence for military service, death of regular operator, or absence due to long-term illness. An absence is considered long-term if it exceeds 12 weeks. Vacated regular runs will be assigned to the extra board operators or part time operators on the basis of seniority until the vacated run is posted and filled. Posting of vacated runs shall take place not more than fourteen (14) calendar days after the run has been vacated. Bidding of the vacated run shall be by seniority order until the run is filled. Should the run be filled by a full time operator, that operator's vacated run shall be filled by the same process.

SECTION 12. Biddable Runs Not Bid – A biddable run that is not bid after being posted will be assigned to the last operator in seniority on the extra board.

SECTION 13. New and Trial Runs – The RTA agrees that any new or trial run established shall be posted for bid.

SECTION 14. Hours of Rest – Each bus operator shall be allowed nine (9) consecutive hours of rest out of each twenty-four (24) hours.

SECTION 15. Travel Time – Scheduled running time via the most direct route shall constitute "travel time" and will be paid when:

- A. An operator is notified to report to the garage, prior to reporting at the relief point for the commencement of his/her day's work; he/she shall be paid travel time from the garage to the relief point.
- B. An operator is relieved during his/her run and notified by the Company to report to the garage. If instructed to resume his/her run he/she shall also be paid travel time from the garage to the relief point.
- C. An operator is relieved at the completion of his/her run and is notified to report to the garage; he/she shall be paid travel time from the relief point to the garage.

SECTION 16. Break Periods:

- A. Straight runs operating six (6) hours or longer will be afforded 50 minutes of aggregated break time and be scheduled at layover intervals throughout the daily run. This time will be for the purpose of affording Bus

Operators meal and rest breaks during which he or she will be free of other activities related to providing service. This minimum break time does not apply to split shifts.

- B. If a Bus Operator does not get all of the intended break time, he or she can fill out a form requesting an investigation. When a Bus Operator does not receive 85% of the intended break on a consistent basis, RTA will implement a fix by the end of the following bid.

ARTICLE 32

Provision Against Pyramiding

Where more than one (1) overtime provision is involved, only that provision which creates the greatest compensation shall apply.

ARTICLE 33

Extra Board Operators and Part-Time Operators

SECTION 1. Operations of the Extra Board:

- A. There shall be one (1) common extra board with the positions on said board established in seniority order.
- B. At the general sign up, the number of extra board positions will be determined by the RTA and posted.
- C. A rotating charter - extra board system, posted in seniority order, will be used, utilizing the "first up - first out" method. This system of operating may be changed at any time by mutual consent of the RTA and the Union.
- D. General rules regulating operators relative to sick leave, miss-outs, etc., shall apply to all extra board operators.
- E. The RTA will endeavor to provide two (2) consecutive days off for all extra board operators. To be considered a full-time employee all general rules regulating the thirty-five (35) hour work week for regular operators will apply to extra board bus operators.
- F. Extra board operators shall be certified, willing and able to operate all RTA routes, vehicles and schedules as assigned by the RTA dispatcher.

SECTION 2. **Part Time Operators:**

- A. Part-Time bus operators will be those operators that either regularly work a biddable part-time run, or who are Casual Part-Time bus operators who work open assignments on an as needed basis. Part-Time and Part-Time/Health-Benefited bus operators shall regularly work less than thirty-five (35) hours per week.
 - B. Part Time and Part-Time/Health-Benefited Operators shall be eligible for any full time operator position that may become available. Should a full time position become available and the Company is able to fill that position, it shall be filled by the most senior part time operator.
 - C. Casual bus operators will be those operators that fill-in on an occasional basis and maintain all licensing/training requirements. Casual bus operators are called as needed. The following rules apply to Casual bus operator status.
 - 1. They may refuse work when offered; however, once they agree to work they are obligated to complete the assignment. Failure to complete an agreed upon assignment will subject them to the attendance policy and possible discipline.
 - 2. They are not guaranteed a set number of hours per week.
 - 3. If a regular part-time or full-time bus operator wants to replace all or part of their bid with alternative employment or alternative activity, then they will be placed on Casual bus operator status. A regular Part- or Full-Time bus operator must provide a written request if they desire Casual bus operator status. Requests may be denied depending on worker availability until the next regularly scheduled bid.
- 1. **Return to Full Time** - Casual bus operators may only return to regular Part or Full-Time bus operator duty if there is an opening at the time of a regularly scheduled bid. Alternately, a Casual bus operator may submit a written request to be promoted to a regular Part- or Full-Time bus operator position in the case of a vacancy, which would permit that employee to choose regular part-time or full-time bids if offered the position based on seniority.
 - 2. **Delayed Status** - Frequent changes in work status between regular part-time and full-time bus operator positions and Casual bus operator positions

are disruptive to the operation and often make it difficult to reliably cover shifts. Therefore, RTA may deny or delay requests to change status. When a Casual bus operator requests promotion to a regular Part-time or Full-Time bus operator status or vice versa, the request may be delayed until the next regularly scheduled bid. The minimum commitment to regular Part- or Full-Time bus operator status must be at least the full bid. Also, when requesting a change in status, please provide as much notice as possible. A minimum of a two-week notice is required.

SECTION 3. Call List for Open Runs – The Company will maintain a voluntary Open Shift Call List of bus operators in order to fill assignments after the regular extra board is exhausted. Bus operators will verbally or electronically inform the lead supervisor or the on-duty dispatcher that he or she wishes to be placed on the Open Shift Call List to cover open assignments. The Open Shift Call List will be divided into two sections: Section 1 will include Casual bus operators and Part-Time bus operators listed in descending seniority order; and Section 2 will include Full-Time bus operators listed in descending seniority order. Bus operators listed in Section 1 must be called in its entirety before those in Section 2 are called. A call is considered complete when a message is left, or when the phone number is dialed and no ability to leave a message is available. In the interest of expediency, company-to-employee contact is not required to satisfy a completed call. Bus operators not on the Open Shift Call List may only be called after the Open Shift Call List is exhausted. The Open Shift Call List is closed daily at Noon. Any bus operators deciding they want to be called after Noon will be placed at the bottom of the Open Shift Call List in an alternate section in the order they are received.

ARTICLE 34

Miss-Outs and Work Assignment

SECTION 1. Miss-Outs – A “miss-out” is defined to be: Each failure of any bus operator to report for duty at the proper time and at the proper place at which his/her assigned duties are scheduled to start.

A bus operator who fails to notify the RTA at least sixty (60) minutes prior to his/her start time that he/she will not report for duty and reporting for their assignment at the proper time and place shall be charged with a “miss-out”. A bus operator may be charged only one miss-out per day.

SECTION 2. Penalties for Missing-Out Shall Be as Follows:

- A. For the first and second "miss-out" incidents within a one-hundred eighty (180) day period, the bus operator involved shall be paid only for the time worked that day, if any.
- B. For the third "miss-out" within a one-hundred eighty (180) day period, the bus operator involved shall be paid only for the time worked that day, if any, and shall receive one (1) day's suspension without pay. If the bus operator, by direction of a supervisor, does not work on the day of the miss-out, that day shall be counted as the one (1) day suspension without pay.
- C. For the fourth "miss-out" within a one-hundred eighty (180) day period, the bus operator involved shall be paid only for the time worked that day, if any, and shall receive two (2) days' suspension without pay. If the bus operator, by direction of a supervisor, does not work on the day of the miss-out, that day shall be counted as the first of the two (2) days' suspension without pay.
- D. For the fifth "miss-out" within a one-hundred eighty (180) day period, the bus operator involved shall be paid only for the time worked that day, if any, and shall be subject to dismissal or such other discipline which the RTA may see fit to impose.
- E. The penalty provisions provided in this Article are not intended as a license to "miss-out" within the limits set forth. A bus operator who "misses-out" consistently over a period of months, although he/she does not reach the limits set forth, may be subject to additional progressive discipline including discharge where appropriate.

SECTION 3. Absent Without Leave – Bus operators who fail to report and make themselves available to their supervisor or his/her designee, within five (5) hours from the time they were scheduled to report for work, shall be considered absent without leave and be subject to suspension or such other discipline as the RTA may see fit to impose, however, in the event they are called, the bus operator must report within one (1) hour.

SECTION 4. Waiver – The RTA may waive the imposition of a disciplinary penalty for a "miss out" as hereinabove provided whenever, in its opinion, a valid reason for such "miss out" exists.

ARTICLE 35

Sick Time and Vacation for Bus Operators

SECTION 1. Sick Time

- A. **Accrual Rate** – All employees are eligible to accrue Sick Time of 2.67 hours per pay period. In no case shall the number of Sick Time hours accrued in a pay period exceed the number of hours worked in that pay period.
- B. **Use** – Employees may take Sick Time for themselves or a family member for the diagnosis, care or treatment of an existing health condition or preventive care, or specified purposes for an employee who is a victim of domestic violence, sexual assault, or stalking.
- C. **Maximum** – Employees may accumulate Sick Pay up to 24 hours per year and carry over a maximum of 24 hours per year to a maximum accrual of 72 hours. Should an employee's Sick Time bank exceed this amount, they will cease to accrue hours over 72 not taken by the end of the calendar year. The Sick Time year will be January 1 to December 31.
- D. **Cash Out** – Sick Time is not eligible for cash out.
- E. **Donating** – The Company will not allow the donating of Sick Time to other employees.
- F. **Reduced Usage** – Sick Time shall be paid at the employee's basic straight-time rate on a regularly scheduled workday, but not to exceed scheduled hours per day. Sick Time payments to employees who are covered under California Workers' Compensation or disability insurance will be reduced by the amount of disability benefits payable under such plan. In no event will an employee receive pay in excess of his regular pay. Sick Time pay shall not duplicate any other Company pay.
- G. **Overtime** – Sick Time taken cannot be used to put an employee in an overtime pay status.

SECTION 2. Vacation Time

- A. **Accrual Rate** – All eligible full time bus operators as defined in Article 31 Section 1 shall accrue Vacation Time at the following rates:

<u>Years of Service</u>	<u>Accrual Per Payroll Period</u>
Hire Date - 2 Years	3.08 Hours per pay period
3 Years - 6 Years	5.08 Hours per pay period
7 Years +	7.08 Hours per pay period

In no case shall the number of Vacation Time hours accrued in a pay period exceed the number of hours worked in that pay period.

- B. **Use** – Employees may use Vacation Time for vacation, sick time or personal leave.
- C. **Maximum** – Employees may accumulate Vacation Time from year to year up to a maximum of 184 hours. Should an employee's Vacation Time bank exceed this amount, they will cease to accrue hours over 184 not taken at the end of the calendar year. The vacation year will be January 1 to December 31. Employees who have had the use of Vacation Time canceled due to scheduling conflicts, will be given an opportunity to schedule the unused Vacation Time in the following year.
- D. **Cash Out** – In the event an employee is denied the use of accrued Vacation Time during the year and that employee has in excess 184 hours of vacation time on the books, any time over 80 hours may be cashed out by the employee at the end of the calendar year.
- E. **Donating** – The Company will allow the donating of Vacation Time to other employees. It will be limited to 50% of accrued Vacation Time. The Company will insure that donated Vacation Time will only be used for medical sick leave purposes. Donating employees may only donate hours from their account when it is in excess of 60 hours and only those hours that are in an excess of 60.
- F. **Reduced Usage** – Vacation Time shall be at the employee's basic straight-time rate on a regularly scheduled workday, but not to exceed scheduled hours per day. Vacation Time payments to employees who are covered under California Workers' Compensation or disability insurance will be reduced by the amount of disability benefits payable

under such plan. In no event will an employee receive Vacation Time pay in excess of his regular pay. Vacation Time pay shall not duplicate any other Company pay.

- G. **Overtime** – Vacation Time taken cannot be used to put an employee in an overtime pay status.

ARTICLE 36

Holidays

SECTION 1. For all full-time bus operators, time and one-half shall be paid for holidays worked as follows:

New Year's Day*
Memorial Day
Christmas Day*
Independence Day*
Labor Day
Thanksgiving Day

SECTION 2. Day Shifting – In the event one of the legal holidays mentioned in this Article falls on a Sunday, the Monday following the Sunday shall be the holiday. Should a holiday fall on a Saturday, the preceding Friday shall be the holiday. Fixed date holidays (*) are exempt from the weekend shifting. Should the holiday fall on a Monday and it is officially declared a legal holiday, then that day only would be considered a holiday within the meaning of this Agreement.

SECTION 3. Eligibility – All eligible full-time bus operators shall receive eight (8) hours at their regular straight time rate of pay for the following holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas Day provided such employee completes their work assignment on their last scheduled or assigned work day prior to such holiday and their first scheduled or assigned work day after such holidays. It is agreed that those employees covered by the contract who are scheduled to work and are late on the day before or the day after the holiday will be paid for the holiday time provided the employee reports within one (1) hour of his/her report time and in proper uniform. Holiday time shall not be counted when computing overtime pay.

If the Company allows an employee to lay off on, or part of, the holiday or his/her work day immediately following or preceding a holiday, the employee will not be penalized the holiday pay time.

ARTICLE 37

Retirement Benefits

SECTION 1. Accrual Rate – ~~A.~~ For all full-time eligible bus operator employees, the RTA shall contribute a fixed dollar amount per pay period to a deferred compensation 457 program administered by the Company. For all eligible full time bus operator employees as defined in Article 31 Section 1, the rate of contribution shall be \$30.00 per pay period.

SECTION 2. Employee Matching – Eligible full-time bus operator employees may also contribute to the plan on their behalf in order to match the company's contribution or contribute an amount based on employee's need. Employees should consult IRS regulations on the maximum contribution allowed annually.

ARTICLE 38

Hourly Wages – Bus Operators

SECTION 1. Wage Increases – Each bus operator will receive an annual contract wage increase on January 1 of each year, as well as an annual merit wage increase on each employee's anniversary date.

RTA Bus Operator Wage Scale				
Level	2018	2019	2020	2021
Assumed CA Min. Wage	\$11.00	\$12.00	\$13.00	\$14.00
Training	\$11.00	\$12.00	\$13.00	\$14.00
New Hire	\$14.30	\$15.60	\$16.90	\$18.20
1 Year	\$14.75	\$16.09	\$17.43	\$18.77
2 Year	\$15.85	\$17.29	\$18.73	\$20.17
3 Year	\$16.24	\$17.72	\$19.20	\$20.68
4 Year	\$16.72	\$18.24	\$19.76	\$21.28
5 Year	\$17.28	\$18.85	\$20.42	\$21.99
6 Year	\$17.83	\$19.45	\$21.07	\$22.69
7 Year	\$18.38	\$20.05	\$21.72	\$23.39
8 Year	\$18.94	\$20.66	\$22.38	\$24.10
9 Year	\$19.51	\$21.28	\$23.05	\$24.82

On January 1 of each year, the contract wage increase shall automatically adjust by the greater of:

1. The amount indicated in the table above as long as the minimum wage change for the state of California is implemented as indicated, or
2. The percentage change in the Consumer Price Index for All Items measured for the Los Angeles-Riverside-Orange County area over the previous twelve (12) reported months.

SECTION 2. No Wage Reduction - No employee shall have their pay rate reduced as a result of the acceptance of this agreement.

SECTION 3. Wage Increases on Ensuing Pay Period - All Bus Operator wage increases will take effect at the next full pay period following the dates discussed above.

SECTION 4. Premium Pay - A Bus Operator who is assigned to work with a trainee, or to fill in as a Dispatcher or Scheduler, will be paid a premium of \$1.25 per hour, in addition to the Bus Operator's hourly wage rate, while performing these duties.

ARTICLE 39

Operator Uniforms

SECTION 1. Uniform Vendor – Bus operators may purchase uniforms at the RTA's designated uniform vendor. Uniforms shall be considered shirts, slacks, sweaters, vests, jackets and hats. Shoes may be purchased at whatever local establishment provided that they comply with the uniform regulations in the Bus Operators Employee Handbook.

SECTION 2. Approved Apparel – Operators will be permitted to operate without any coats or jackets. Operators shall be allowed to wear regulation uniform shirts or regulation sport shirt with long or short sleeves. Sport shirts may be worn year-round if operator so desires.

SECTION 3. Quantities – RTA shall provide all bus operators who successfully complete the training program with the following uniform allowance:

- Five (5) pairs of pants
- Five (5) shirts
- One (1) winter jacket

- One (1) hat

SECTION 4. Annually* - RTA shall provide all bus operators who are employees of the company upon ratification of this agreement and annually thereafter on August 1 of each year through the term of this agreement the following uniform allowance:

- Five (5) pairs of pants
- Five (5) shirts
- One (1) hat

*1 winter jacket every three years or as needed to replace a worn item.

SECTION IV – MAINTENANCE EMPLOYEE PROVISIONS

ARTICLE 40

Maintenance Department

SECTION 1. **Hours of Work** – The Company shall have Full Time, Part-Time/Health-Benefited and Part Time Positions as established upon ratification of the collective bargaining Agreement. Positions shall be determined annually through the operating program (budget) adopted by the RTA Board. All regular full-time maintenance department employees shall be guaranteed a five (5) day work week, except where holidays intervene and regularly work thirty-five (35) hours per week or more. All work performed in excess of forty (40) hours per week shall be paid for at the rate of time and one-half (1 1/2). All hours over twelve (12) in a work day will be paid at the double time rate. Part-Time/Health-Benefited employees shall be any employee who regularly works more than thirty (30) hours per week but less than thirty-five (35) hours per week.

When a Full Time vacancy occurs, the Company shall post the position for ten (10) calendar days. The position shall be opened for application during this ten (10) day period only. Part-Time/Health-Benefited and Part-Time employees may apply for the position by completing an RTA Application for Promotion to Full Time form and submit the application the application to the Company. Once the job posting is taken down, the position application process shall be considered closed. The RTA shall review all applications and notify all applicants of their status.

Employees will be paid for all time, including travel time while in the service of the employer, but excluding lunch periods. Unpaid lunch periods are not to exceed 1 hour.

- A. **Unscheduled (Emergency) Call-Out.** On an unscheduled (emergency) call-out, an employee shall receive a minimum of two (2) hours pay at the applicable overtime rate.
- B. **On-Call Pay** – When necessary, the company will designate a holiday on-call employee based on the overtime standing of the shop. In addition to holiday pay for all designated holidays, a holiday on-call employee shall receive two (2) hours of pay at the straight rate for being on-call for that holiday, and if called out will receive holiday pay for all hours worked. Hours worked starts at the time the employee initially talks with a company representative about the service emergency on the company-provided cellular phone. The on-call employee is required to remain in the RTA service area, be accessible by an RTA-provided cellular phone, remain fit for duty and to report to the nearest RTA operating site within 15 minutes.
- C. The work week will be five (5) consecutive eight-hour (8) days.

SECTION 2. Job Assignments – The Manager, Maintenance and Facilities shall assign work shifts for all classifications in the department based upon the employee's ability, skills and knowledge of RTA equipment and facilities. Work shifts for all maintenance department employees shall not change more than two (2) times per year.

SECTION 3. Temporary Transfers – All locations of work desired by the RTA, where it is practicable, shall be directed to the employees through the on-duty supervisor. Every employee shall perform any work his/her supervisor directs him/her to do; provided that if such work pays a lower rate of pay than his/her regular pay, such employee shall nevertheless receive his/her regular rate of pay. In the event the work to which such employee is transferred or which he/she is directed to do pays a higher rate, and such transfer continues for one (1) hour or more, he/she shall receive for all time spent on such job, the higher rate of pay.

In order to permit an employee to receive training or orientation, the RTA may assign an employee to any shift or assignment it may designate without regard to seniority for a period not to exceed ninety (90) calendar days in each instance. The assignment of an employee for training or orientation

under this paragraph shall not result in the displacement of any employee already in such shift or assignment.

SECTION 4. Reports, Attendance and Time Slips –

A. With the exception of Mechanic Tool Inventory reports, all reports and time slips shall be made on the RTA's time. Maintenance employees shall be permitted to clock in not more than ten (10) minutes before the beginning of their work period.

B. Each shift shall have two (2) ten (10) minute breaks.

C. Miss-Outs – A "miss-out" is defined to be: Each failure of any employee to report for duty at the proper time and at the proper place at which his/her assigned duties are scheduled to start.

An employee who fails to notify the RTA at least sixty (60) minutes prior to his/her start time that he/she will not report for duty and reporting for their assignment at the proper time and place shall be charged with a "miss-out". An employee may be charged only one miss-out per day.

Penalties for Missing-Out Shall Be as Follows:

1. For the first, second and third "miss-out" incidents within a one-hundred eighty (180) day period, the employee involved shall be paid only for the time worked that day, if any.
2. For the fourth "miss-out" within a one-hundred eighty (180) day period, the employee involved shall be paid only for the time worked that day, if any, and shall receive one (1) day's suspension without pay. If the employee, by direction of a supervisor, does not work on the day of the miss-out, that day shall be counted as the one (1) day suspension without pay.
3. For the fifth "miss-out" within a one-hundred eighty (180) day period, the employee involved shall be paid only for the time worked that day, if any, and shall receive two (2) days' suspension without pay. If the employee, by direction of a supervisor, does not work on the day of the miss-out, that day shall be counted as the first of the two (2) days' suspension without pay.

4. For the sixth "miss-out" within a one-hundred eighty (180) day period, the employee involved shall be paid only for the time worked that day, if any, and shall be subject to dismissal or such other discipline which the RTA may see fit to impose.
 5. The penalty provisions provided in this Article are not intended as a license to "miss-out" within the limits set forth. An employee who "misses-out" consistently over a period of months, although he/she does not reach the limits set forth, may be subject to additional progressive discipline including discharge where appropriate.
- D. **Absent Without Leave** – Employees who fail to report and make themselves available to their supervisor or his/her designee, within five (5) hours from the time they were scheduled to report for work, shall be considered absent without leave and be subject to suspension or such other discipline as the RTA may see fit to impose, however, in the event they are called, the employee must report within one (1) hour.
- E. **Waiver** – The RTA may waive the imposition of a disciplinary penalty for a "miss out" as hereinabove provided whenever, in its opinion, a valid reason for such "miss out" exists.

SECTION 5. Equipment for Maintenance Employees –

- A. Rubber boots, hats and raincoats will be furnished to mechanics and utility workers by the Company when necessary.
- B. The RTA shall furnish regulation coveralls or two-piece uniforms, at employee's option. In addition, RTA shall furnish jackets, and annual belt and steel-toed boot allowances. Employees wearing two-piece uniforms must wear shirt inside trousers with a belt. The RTA shall pay the cost of coverall or two-piece uniform, as well as jacket, laundry service. Worn or damaged coveralls or two-piece uniform and jacket must be turned in when obtaining replacement of same. Upon termination of employment, employees shall turn in their coveralls or two-piece uniforms and jacket.
- C. The RTA shall provide all specialty tools that are required or tools for new equipment that are required for vehicle and facility repairs. Mechanics will be required to provide all hand tools in order to perform their job. The RTA will repair or replace broken or stolen tools, provided a Police Report is provided in case of the latter. Each Mechanic will provide a Tool Inventory (developed on the Mechanic's own time) annually and/or as the value of the

Mechanic's tools increases by 10%. Replacement tools provided by the RTA will be the same or equivalent value. The RTA will advise Mechanics when any items on the Tool Inventory list are not applicable to RTA's needs and are thus not covered under this section.

D. The Company will have power tools available for employees required to use power tools. RTA shall provide all specialty tools that are required or tools for new equipment that are required for vehicle and facility repairs.

SECTION 6. Bumping – Maintenance employees displaced by senior employees or returning veterans or who, for any reason are deprived of their shifts through no fault of their own, may, if they so desire, displace employees junior to them. This provision shall not apply to operators transferring from operations to maintenance department.

SECTION 7. Layoffs – In the event of a layoff in the maintenance department, the employee with the least RTA seniority within the classification being reduced shall be the first employee to be displaced. After he/she has been displaced from his/her classification, he/she shall have the right to exercise his/her RTA seniority anywhere in a maintenance department classification where he/she is qualified.

SECTION 8. Training Materials – The RTA will provide the Automotive Service Excellence Test Preparation Transit Bus Certificate and Study Guide and Practice Test Pack H1-T8 for use by Mechanics.

ARTICLE 41

Sick Time and Vacation for Maintenance and Utility Employees

SECTION 1. Sick Time

- A. **Accrual Rate** – All employees are eligible to accrue Sick Time of 2.67 hours per pay period. In no case shall the number of Sick Time hours accrued in a pay period exceed the number of hours worked in that pay period.
- B. **Use** – Employees may take Sick Time for themselves or a family member for the diagnosis, care or treatment of an existing health condition or preventive care, or specified purposes for an employee who is a victim of domestic violence, sexual assault, or stalking.
- C. **Maximum** – Employees may accumulate Sick Pay up to 24 hours per year and carry over a maximum of 24 hours per year to a maximum accrual of

72 hours. Should an employee's Sick Time bank exceed this amount, they will cease to accrue hours over 72 not taken by the end of the calendar year. The Sick Time year will be January 1 to December 31.

- D. **Cash Out** – Sick Time is not eligible for cash out.
- E. **Donating** – The Company will not allow the donating of Sick Time to other employees.
- F. **Reduced Usage** – Sick Time shall be paid at the employee's basic straight-time rate on a regularly scheduled workday, but not to exceed scheduled hours per day. Sick Time payments to employees who are covered under California Workers' Compensation or disability insurance will be reduced by the amount of disability benefits payable under such plan. In no event will an employee receive pay in excess of his regular pay. Sick Time pay shall not duplicate any other Company pay.
- G. **Overtime** – Sick Time taken cannot be used to put an employee in an overtime pay status.

SECTION 2. Vacation Time

- A. **Accrual Rate** – All eligible full time maintenance and utility as defined in Article 40 Section 1 shall accrue Vacation Time at the following rates:

<u>Years of Service</u> <u>Period</u>	<u>Accrual</u> <u>Per</u> <u>Payroll</u>
Hire Date - 2 Years	3.39 Hours per pay period
3 Years - 6 Years	5.39 Hours per pay period
7 Years +	7.39 Hours per pay period

In no case shall the number of Vacation Time hours accrued in a pay period exceed the number of hours worked in that pay period.

- B. **Use** – Employees may use Vacation Time for vacation, sick time or personal leave.
- C. **Maximum** – Employees may accumulate Vacation Time from year to year up to a maximum of 184 hours. Should an employee's Vacation Time bank exceed this amount, they will cease to accrue hours over 184 not taken at the end of the calendar year. The vacation year will be January 1 to December 31. Employees who have had the use of Vacation Time canceled

due to scheduling conflicts, will be given an opportunity to schedule the unused Vacation Time in the following year.

D. **Cash Out** – In the event an employee is denied the use of accrued Vacation Time during the year and that employee has in excess 184 hours of vacation time on the books, any time over 80 hours may be cashed out by the employee at the end of the calendar year.

E. **Donating** – The Company will allow the donating of Vacation Time to other employees. It will be limited to 50% of accrued Vacation Time. The Company will insure that donated Vacation Time will only be used for medical sick leave purposes. Donating employees may only donate hours from their account when it is in excess of 60 hours and only those hours that are in an excess of 60.

F. **Reduced Usage** – Vacation Time shall be at the employee's basic straight-time rate on a regularly scheduled workday, but not to exceed scheduled hours per day. Vacation Time payments to employees who are covered under California Workers' Compensation or disability insurance will be reduced by the amount of disability benefits payable under such plan. In no event will an employee receive Vacation Time pay in excess of his regular pay. Vacation Time pay shall not duplicate any other Company pay.

G. **Overtime** – Vacation Time taken cannot be used to put an employee in an overtime pay status.

ARTICLE 42

Mechanic and Utility Holidays

SECTION 1. Overtime Paid for Recognized Holidays – For all full-time mechanic and utility employees, time and one-half hours shall be paid for holidays worked as follows:

New Year's Day*
Memorial Day
Christmas Day*
Independence Day*
Labor Day
Thanksgiving Day

SECTION 2. Day Shifting – In the event one of the legal holidays mentioned in this Article falls on a Sunday, the Monday following the Sunday shall be

the holiday. Should a holiday fall on a Saturday, the preceding Friday shall be the holiday. Fixed date holidays (*) are exempt from the weekend shifting. Should the holiday fall on a Monday and it is officially declared a legal holiday, then that day only would be considered a holiday within the meaning of this Agreement.

SECTION 3. Eligibility – All eligible full-time mechanic and utility employees shall receive eight (8) hours at their regular straight time rate of pay for the following holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas Day provided such employee completes their work assignment on their last scheduled or assigned work day prior to such holiday and their first scheduled or assigned work day after such holidays. It is agreed that those mechanic and utility employees covered by the contract who are scheduled to work and are late on the day before or the day after the holiday will be paid for the holiday time provided the employee reports within one (1) hour of his/her report time and in proper uniform. Holiday time shall not be counted when computing overtime pay.

SECTION 4. Qualifying – No employee shall be eligible for holiday pay or holiday premiums unless he has reported for work on his regularly scheduled days immediately preceding and immediately following the holiday, unless absence from work is caused by excused leave or certified illness, but in no event shall an employee be eligible for holiday pay unless he has worked or received compensation during the holiday week.

SECTION 5. Forced Work – Forced holiday work will be in reverse seniority order.

ARTICLE 43

Retirement Benefits

SECTION 1. Accrual Rate – For all full-time eligible mechanics and utility employees, the RTA shall contribute a fixed dollar amount per pay period to a deferred compensation 457 program administered by the Company. For all eligible full-time mechanics and utility employees as defined in Article 40 Section 1, the rate of contribution shall be:

Hire date to 2 years	\$15.00 per pay period
3 years - 6 years of service	\$30.00 per pay period
7 years + of service	\$45.00 per pay period

SECTION 2. Employee Matching – Eligible full-time Mechanics may also contribute to the plan on their behalf in order to match the company's contribution or contribute an amount based on employee's need. Employees should consult IRS regulations on the maximum contribution allowed annually.

ARTICLE 44

Hourly Wages – Mechanic and Utility

SECTION 1. Wage Increases – Each mechanic and utility worker will receive an annual contract wage increase on January 1 of each year, as well as an annual merit wage increase on each employee's anniversary date.

Mechanic A Wage Scale				
Step	2018	2019	2020	2021
Min. Wage	\$11.00	\$12.00	\$13.00	\$14.00
Step 1	\$28.80	\$30.80	\$32.70	\$34.50
Step 2	\$29.77	\$31.84	\$33.80	\$35.66
Step 3	\$30.77	\$32.91	\$34.94	\$36.86
Step 4	\$31.81	\$34.02	\$36.12	\$38.10
Step 5	\$32.88	\$35.17	\$37.34	\$39.38
Step 6	\$33.99	\$36.36	\$38.60	\$40.71
Step 7	\$36.30	\$38.80	\$41.20	\$43.50

Mechanic B Wage Scale				
Step	2018	2019	2020	2021
Min. Wage	\$11.00	\$12.00	\$13.00	\$14.00
Step 1	\$23.60	\$25.20	\$26.80	\$28.30
Step 2	\$24.28	\$25.93	\$27.57	\$29.11
Step 3	\$24.98	\$26.68	\$28.36	\$29.95
Step 4	\$25.70	\$27.45	\$29.18	\$30.81
Step 5	\$26.44	\$28.24	\$30.02	\$31.70
Step 6	\$27.20	\$29.05	\$30.88	\$32.61
Step 7	\$28.80	\$30.80	\$32.70	\$34.50

Mechanic C (No Tools) Wage Scale				
Step	2018	2019	2020	2021
Min. Wage	\$11.00	\$12.00	\$13.00	\$14.00
Step 1	\$19.50	\$20.80	\$22.10	\$23.30
Step 2	\$20.05	\$21.38	\$22.72	\$23.95
Step 3	\$20.61	\$21.98	\$23.36	\$24.62
Step 4	\$21.19	\$22.60	\$24.01	\$25.31
Step 5	\$21.78	\$23.23	\$24.68	\$26.02
Step 6	\$22.39	\$23.88	\$25.37	\$26.75
Step 7	\$23.60	\$25.20	\$26.80	\$28.30

Apprentice (No Tools) Wage Scale				
Step	2018	2019	2020	2021
Min. Wage	\$11.00	\$12.00	\$13.00	\$14.00
Step 1	\$16.10	\$17.20	\$18.30	\$19.30
Step 2	\$17.15	\$18.33	\$19.50	\$20.56
Step 3	\$19.50	\$20.80	\$22.10	\$23.30

Utility (No Tools) Wage Scale				
Step	2018	2019	2020	2021
Min. Wage	\$11.00	\$12.00	\$13.00	\$14.00
Step 1	\$15.80	\$16.90	\$17.90	\$18.90
Step 2	\$16.27	\$17.41	\$18.44	\$19.47
Step 3	\$16.76	\$17.93	\$18.99	\$20.05
Step 4	\$17.26	\$18.47	\$19.56	\$20.65
Step 5	\$17.78	\$19.02	\$20.15	\$21.27
Step 6	\$18.31	\$19.59	\$20.75	\$21.91
Step 7	\$18.90	\$20.20	\$21.40	\$22.60

On January 1 of each year, the contract wage increase shall automatically adjust by the greater of:

1. The amount indicated in the tables above as long as the minimum wage change for the state of California is implemented as indicated, or
2. The percentage change in the Consumer Price Index for All Items measured for the Los Angeles-Riverside-Orange County area over the previous twelve (12) reported months.

SECTION 2. No Wage Reduction – No mechanic or utility worker shall have their pay rate reduced as a result of the acceptance of this agreement.

SECTION 3. Wage Increases on Ensuing Pay Period – All mechanic and utility worker wage increases will take effect at the start of the next full pay period following the dates discussed above.

FOR THE SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

Lynn Compton, President

Geoff Straw, Executive Director

Timothy McNulty, Counsel

DATED: _____

FOR THE TEAMSTERS LOCAL 986

Lynn Swenson, Area Coordinator

Alan Fields, Steward

Larry Bray, Steward

Vernon Griego, Steward

DATED: _____

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

November 1, 2017

STAFF REPORT

AGENDA ITEM: B-3

TOPIC: PUBLIC HEARING: Consider Proposed Changes to Fare Program

ACTION: Approve Fare Program Change Effective December 31, 2017

PRESENTED BY: Geoff Straw

STAFF RECOMMENDATION: Approve

RTAC RECOMMENDATION: Approve

SUMMARY:

Staff is recommending the RTA Board of Directors adopt a fare program change that will result in a relatively small net increase in fare revenues despite an expected small decline in ridership. This additional revenue is necessary because of recent declines in state support for our operations, as well as local voters' rejection of Measure J, while at the same time our operating costs have been increasing since the previous fare increases in 2010 (cash fares) and 2013 (multi-ride fare media).

When the RTA Board adopted the FY17-18 annual budget at its May 2017 meeting, it assumed a net increase of 5% in annual fare revenues, or roughly \$65,690. The Board is conducting a Public Hearing today regarding the fare program change being recommended by staff and the Regional Transit Advisory Committee. The fare changes would be implemented on Sunday December 31, 2017.

Public Outreach Process for Proposed Fare Program Changes

To ensure that our robust public engagement process considered the public's ideas and concerns, below is a list of outreach efforts that staff conducted in August and September 2017.

- Staff held public workshops around the county (San Luis Obispo, Atascadero, Pismo Beach, Paso Robles and Morro Bay) to present the proposed fare changes and seek comments. This included outreach at nearby transit centers when buses were arriving and/or departing during the time the workshop was being held.

- Feedback overall was an understanding by passengers of the need for changes to the fare structure.
- Staff conducted an online survey, which was promoted thorough on-bus LCD screens, the RTA website, social media, and notices at the top 30 bus stops. Staff received 60 online responses.
 - The majority of the survey responses were from passengers who ride three or more times per week. More than half would continue to ride as much as they do now, and most use a 31-Day pass – either the Regular (non-discounted) RTA or Regular Regional pass. Most respondents have other transportation options and ride our buses in lieu of driving. They also feel the RTA provides good value.
 - A variety of requests were submitted for additional service (weekday as well as weekend, especially Sunday), adjustments to specific fare types (more to the 31-Day regular passes and less to the cash fare and vice versa) and additional lighting at bus stops.
 - One Riverside County resident raised concern by telephone about the discounted rides provided to seniors (age 65-79) versus the free rides for seniors over the age of 80. Staff reiterated that RTA meets the FTA's half fare requirement, as well as applicable California code requirements.
- Senior staff made presentations to each City Council in September. Most of these meetings were recorded and are re-aired on local-access television channels.

Fixed Route Fare Program Increases

The last RTA fixed route cash fare increase was implemented in August 2010, when the base fare increased from \$1.25 to \$1.50. Multi-ride pass prices were subsequently increased in 2013. According to the U.S. Bureau of Labor Statistics, the Consumer Price Index shows that overall costs increased 12.9% in the region between August 2010 and May 2017.

The fare table below presents the proposed fare increases by fare category in comparison to the current fare on RTA fixed-route services. In all cases, staff attempted to minimize the proportional increase for the various multi-ride fare instruments, while the cash fare increases are relatively larger. This is common in the transit industry, since the multi-ride instruments provide great value to passengers on per-trip basis, while transit agencies seek to increase the use of passes because they speed the passenger boarding process and provide stability in fare revenue receipts. It is also common to implement single-coin increases for base cash fares (i.e., from \$1.50 to \$1.75 for a single-zone fare rather than a straight percentage), although this also results in increasing compression for each additional zone fare paid. The discounted cash fares

Fare/Pass	Current Fare	New Fare
Fixed Route Cash Fare (based on zones crossed on each route)	\$1.50 to \$3.00	\$1.75 to \$3.25
Fixed Route Cash Fare Discounted (based on zones cross on each route)	\$0.75 to \$1.50	\$0.85 to \$1.60
Regional Day Pass	\$5.00	\$5.50
RTA-Only 31-Day Pass	\$44.00	\$47.00
RTA-Only 7-Day Pass	\$14.00	\$16.00
RTA-Only 31-Day Pass Discounted	\$22.00	\$23.50
Regional 31-Day Pass	\$64.00	\$68.00
Regional 31-Day Pass Discounted	\$32.00	\$34.00
Runabout ADA Cash Fare	\$3.00 to \$10.00	\$3.00 to \$11.00

for seniors, youth and disabled riders would continue to be half-the general public fare, rounded to the nearest lower single-coin increase level.

Runabout Base Fare Program Increases

As required under the Americans with Disabilities Act, complementary ADA paratransit (Runabout) fares cannot exceed twice the cash fare for the same fixed-route trip. At its November 2014 meeting, the RTA Board adopted a new Runabout fare program that normalized this twice-the-fixed-route-cash-fare scenario, while also capping the maximum one-way fare at twice the Regional Day Pass price, or $2 \times \$5.00 = \10.00 . That new Runabout fare policy was implemented in February 2015. Staff recommends that this same mechanism be used: the Runabout fare would be set at twice the fixed-route fare, with a new cap of $2 \times \$5.50$ (the recommended new Regional Day Pass price) = \$11.00. It should be noted that the single-zone fare within the Paso Express, SoCo Transit and SLO Transit service areas would remain at \$3.00, since the fixed route base cash fare would remain \$1.50.

Staff will send a letter to each Runabout rider during November explaining the fare changes effective December 31, 2017 if adopted today.

Establishment of Runabout Premium-Service Fares

The ADA permits agencies to set fares for “premium” services – those that go beyond the complementary ADA paratransit service requirements – at a usual and customary rate. An example of premium service provided by Runabout is the service provided to Tri-Counties Regional Center (TCRC) clients. RTA currently provides subscription (sometimes called “standing order”) service to clients on Runabout vans, and we bill the TCRC broker monthly. Staff negotiated a new rate with TCRC’s broker for this premium service equating to the average per-passenger price for service provided by Ride-On Transportation for their “fixed-route, group-ride” service in the previous fiscal year. In FY16-17, Ride-On’s average price charged to TCRC’s broker was \$17.25 per passenger-trip, and that same rate should be considered by the RTA Board as our premium-service rate on Runabout.

Staff Recommendation

Approve the new fare program for RTA fixed-route, base Runabout services, and premium Runabout services, as indicated in the staff report.



San Luis Obispo Regional Transit Authority

Executive Committee Meeting

Draft Minutes 8/9/2017

C-1

Members Present: Lynn Compton, President
Tom O'Malley, Past President

Members Absent: Jamie Irons, Vice President

Staff Present: Geoff Straw, Executive Director
Tania Arnold, Deputy Director and CFO
Shelby Walker, Administrative Assistant
Tim McNulty, County Counsel

Also Present: Pete Rodgers, SLOCOG
Ron De Carli, SLOCOG
Aida Nicklin, SLOCOG
Eric Greening, Atascadero

1. **Call to Order and Roll Call:**

President Lynn Compton called the meeting to order at 10:01 a.m. Silent Roll Call was taken and a quorum was present.

2. **Public Comments:**

Mr. Eric Greening, Atascadero, stated with the new times that were rolled out for the Route 12, he is curious if it will affect the Cuesta students. He stated he will talk to them.

3. **Information Items:**

A-1 Executive Director's Report

Mr. Straw stated that **Ms. Suzy Sisneros** was selected by her peers as the Employee of the Quarter. She was honored at a company barbecue at our Arroyo Grande facility, and she will join us at the September 6th Board meeting.

Due to recent recruitment challenges, the RTA implemented a media blitz to attract Bus Operators. We also used electronic notices: the bus headsigns and on the LCD screens inside the buses. The next training class begins on September 11th.

The 30-day public comment period on the Initial Study – Mitigated Negative Declaration report for the Maintenance Facility report officially closes on August 19th. So far, no official comments have been submitted. If any comments are received, we will summarize and respond to them as part of the Public Hearing scheduled for the September 6th Board meeting.

He continued by stating that the Paso Bus Parking Yard 100% design/engineering documents and cost estimate have been received. Once completed, staff will incorporate the documents into the bid package and we will begin the construction bidding process. Hoping to be in by January 2018.

On June 13th, the County submitted the RTA-developed application to the City of San Luis Obispo to make Government Center passenger facility site improvements. The City has required a review by the Tree Commission, since we are proposing the removal and replacement of a street tree located on Palm Street near Osos Street; that hearing will occur on August 28th. The County Board of Supervisors will consider a no-cost lease agreement with the RTA for the partial use of County property at its October 3rd meeting.

The service improvements on Route 12 that were recommended in the 2016 SRTP will be implemented on August 20th. It is more direct for Los Osos.

He stated staff is finalizing an online survey for the proposed fare changes to get more customer input, which will be launched in late August. We are also developing both on-board passenger surveys and an online survey as part of our biennial Customer Perception Survey. These latter efforts will be conducted in October. RTA staff conducted its annual Celebrate Safety Day on August 2nd.

Staff submitted a letter to SLOCOG requesting that the RTA be considered as a second Consolidated Transportation Services Agency, since we operate community-based services on behalf of the County that will not feasibly meet farebox recovery ratio requirements identified in TDA law for traditional public transit services. Specifically, the demand response / lifeline services in Shandon, Templeton and Nipomo cannot be cost-effectively served with fixed-routes. In addition, we requested that the farebox recovery ratio requirements in all three urbanized areas be reconsidered, as permitted under TDA law. **President Compton** asked what is the farebox ratio exactly. **Mr. Straw** stated it is fares/divided by operating cost. When the area became urbanized the farebox went up to 20%.

Mr. Straw continued by stating the 30-day comment period for the updated Disadvantaged Business Enterprise program was officially opened during the August 2nd special Board meeting. Staff has sent notices to partner agencies and interested organizations, and we will advertise the September 6th Public Hearing as required by our public participation policies.

Staff is still assembling year-end performance results. We are confident that we will have final (but unaudited) figures together for the September 6th Board meeting.

President Compton opened public and board comment.

President Compton closed public and board comment.

4. Action Items

B-1 Authorize Executive Director to Submit Application for FTA Section 5339 Funds for the Bus Maintenance Facility Project

Mr. Straw stated that now that the RTA Bus Maintenance Facility Project has progressed to the environmental documentation public review stage, we are in a position to begin submitting grant applications to our various funding partners to implement this vital project. The most recent Notice of Funding Opportunity for the FTA Section 5339 Bus and Bus Facilities Infrastructure Investment Program was issued on July 12, 2017. FTA Section 5339 is a capital-only program, and it makes federal resources available to states and direct recipients to replace, rehabilitate and purchase buses and related equipment, and to construct bus-related facilities. The current solicitation requires submittal of all grant application documents by August 25, 2017.

The attached draft application document will be supplemented with support letters that SLOCOG and RTA staff have solicited from area leaders. We are seeking \$9,120,000 in FTA Section 5339 funds to maximize leveraging of scarce local dollars, using an 80% federal and 20% local split. It should be noted staff is simultaneously developing grant application documents for California Proposition 1B funds, which was authorized by the RTA Board at its July 12, 2017 meeting. The Proposition 1B, as well as anticipated Senate Bill 1 funds, can be used to fully provide the necessary 20 percent local match.

Because the August 25th deadline occurs prior to the RTA Board's next meeting on September 6th, staff is seeking the Executive Committee's authorization to submit the grant application within the funding limits presented in the attached draft document. Staff will provide a summary of the grant application to the full Board at its September 6th meeting, and the Board will subsequently be provided the opportunity to accept the award if the RTA is chosen for funding.

President Compton opened public and board comment.

President Compton asked if they can give less than the requested amount. **Mr. Straw** stated that yes, they can.

Mr. Straw stated it was the same funding source used for the transit center. **President Compton** asked how much we got for that. **Mr. Rodgers** stated that 10 million was asked for and 4 million was granted. We will take any amount that is granted.

Mr. Greening stated he is fine with the proposed action. He asked when the money must be used before it is goes away. **Mr. Straw** stated that we have five years from when it is announced.

Mr. Ron De Carli SLOCOG has been working closely with RTA on this application. He knows it is a critical need for RTA. Have been pushing hard to find grant opportunities and getting support letters. At the October board meeting SLOCOG will be recommended Prop 1B funding and SB-1 transit assistant funds. There will be a contingency plan will be developed as well.

President Compton closed public and board comment.

Board Member O'Malley moved approval of action item B-1 and seconded by **President Compton**. The motion carried on a voice vote.

5. Consent Agenda Items

C-1 Executive Committee Meeting Minutes of June 21, 2017

C-2 Executive Committee Meeting Minutes of July 12, 2017

President Compton moved approval of consent agenda and seconded by **Board Member O'Malley**. The motion carried on a voice vote.

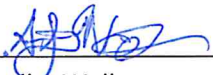
6. Agenda Review:

Mr. Straw briefly reviewed RTA Board Agenda items for the September 6th meeting.

7. Adjournment: **President Compton** adjourned RTA Executive Committee meeting at 10:29 a.m.

Respectfully Submitted,

Acknowledged by,



Shelby Walker
Administrative Assistant



Lynn Compton
RTA President 2017

DRAFT
SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
MINUTES OF SEPTEMBER 6, 2017
C-2

BOARD MEMBERS PRESENT:

LYNN COMPTON, FOURTH DISTRICT, COUNTY OF SAN LUIS OBISPO (President)
JAMIE IRONS, CITY OF MORRO BAY (Vice President) (arrived 8:51 a.m.)
DEBBIE ARNOLD, FIFTH DISTRICT, COUNTY OF SAN LUIS OBISPO
TIM BROWN, CITY OF ARROYO GRANDE
BRUCE GIBSON, SECOND DISTRICT, COUNTY OF SAN LUIS OBISPO
ADAM HILL, THIRD DISTRICT, COUNTY OF SAN LUIS OBISPO
TOM O'MALLEY, CITY OF ATASCADERO
DAN RIVOIRE, CITY OF SAN LUIS OBISPO
JOHN PESCHONG, FIRST DISTRICT, COUNTY OF SAN LUIS OBISPO
FRED STRONG, CITY OF PASO ROBLES
ED WAAGE, CITY OF PISMO BEACH

BOARD MEMBERS ABSENT:

JOHN SHOALS, CITY OF GROVER BEACH

STAFF PRESENT:

GEOFF STRAW, EXECUTIVE DIRECTOR
TANIA ARNOLD, DEPUTY DIRECTOR AND CFO
TIM MCNULTY, SAN LUIS OBISPO COUNTY COUNSEL
SHELBY WALKER, ADMINISTRATIVE ASSISTANT
MARY GARDNER, MARKETING & COMMUNITY RELATIONS MANAGER
LESLIE SANCHEZ, HUMAN RESOURCES OFFICER
OMAR MCPHERSON, GRANTS MANAGER
MICHAEL SEDEN-HANSEN, SPECIAL PROJECTS COORDINATOR
TRENA WILSON, FINANCE ADMINISTRATIVE ASSISTANT
SHELLY HORTON, LEAD OPERATIONS SUPERVISOR
SUZY SISNEROS, BUS OPERATOR

CALL TO ORDER AND ROLL CALL: President Lynn Compton called the meeting to order at **8:31 a.m.** A roll call was taken and a quorum was present.

Public Comments: Mr. Eric Greening, Atascadero, is pleased with the service. One issue he has with the proposed fare increase is that the dates for the public outreach meetings are not posted on the website. He stated it would be helpful to the public to know about them or where they can get information. He is

open to the fare increase, but believes that the maximum public engagement is an important part of the process.

D. CLOSED SESSION ITEMS – CONFERENCE WITH LEGAL COUNSEL: It is the intention of the Board to meet in closed session concerning the following items:

D-1 Conference with Labor Negotiator Geoff Straw concerning the following labor organization: Teamsters Local 986

Mr. Greening, Atascadero, stated that the bus operators are worth more than we are able to pay them now. He said that he has been on buses when the bus operators' skills were lifesaving and they should be paid more for being safety professionals.

The RTA Board went into Closed Session at **8:35 a.m.** and returned to Open Session at **8:40 a.m.**

Counsel **Mr. Tim McNulty** stated that he had nothing to report out of the Closed Session.

A. INFORMATION AGENDA:

A-1 Executive Director's Report: **Mr. Geoff Straw** introduced **Ms. Shelly Horton** to present the Employee of the Quarter. **Ms. Horton** stated that **Ms. Suzy Sisneros** is a resident of Arroyo Grande and is one of our greatest drivers and has a great attitude. **Ms. Sisneros** stated that she loves working for RTA and that the supervisors are great and always willing to help. **Mr. Straw** mentioned that **Ms. Sisneros** has been with RTA for six years and has also earned her five year safety award.

He continued by mentioning that RTA and SoCoTransit will conduct the annual Bus Rodeo on October 15 from 11:00 AM to 3:00 PM. All Board members and families are invited to join us at this exciting event.

Due to recent recruitment challenges, the RTA conducted a media blitz to attract Bus Operators on the radio and cable TV. We also used electronic notices: the bus head signs and the LCD screens inside the buses. As of last week, a total of 41 applications were submitted and we provided offers to eight RTA candidates and one SoCoTransit candidate.

The construction bidding process is open for the Paso Bus Parking Yard project. A pre-bid meeting was conducted on September 5th, and the bidding period will close at 3:00 PM on September 11th. The original goal of a November 2017 move-in is not possible, so we are now aiming for a February 2018 move.

On June 13th, our partners at SLO County public works submitted the RTA-developed application to the City of San Luis Obispo to make Improvements to the Government Center passenger facility. The City's Tree Commission reviewed and authorized a tree replacement, and we are expecting final city approval in the coming week or so following reviews by the City's public works and development departments. Because of these additional steps, the County Board of Supervisors is now planning to consider a no-cost lease agreement with the RTA for the partial use of County property at its October 3rd meeting.

The service improvements on Route 12 that were recommended in the 2016 SRTP were implemented on August 20th. In essence, all Route 12 buses now layover at Government Center instead of at Morro Bay Park or in Los Osos – which provides more consistent schedules for riders. By all accounts, the new arrangement is working well.

To bolster customer input opportunities, staff has published an online survey for the proposed fare changes. We have also scheduled short presentations to each City Council, the Board of Supervisors, and scheduled public workshops in Atascadero, Pismo Beach, Morro Bay, Paso Robles and San Luis Obispo. We are also developing both on-board passenger surveys and an online survey as part of our biennial Customer Perception Survey. These latter efforts will be conducted in October.

RTA staff conducted its annual Celebrate Safety Day on August 2nd, which was also the 8th anniversary of RTA taking operations and maintenance in-house. Staff members cooked breakfast for the morning Bus Operators and provided sandwiches for the afternoon employees. Senior staff also announced Safety Awards for each Bus Operator on buses, which was almost universally met with standing ovations by the riders.

Staff submitted an application to the Federal Transit Administration for discretionary FTA Section 5339 Bus and Bus Facilities funding to implement a long-term bus garage facility. Under this grant proposal, up to \$9.1 million would be provided by the FTA, and the remaining would be provided by another grant proposal submitted to SLOCOG for \$1.2 million in Proposition 1B funds and another \$1.2 million in current/future Senate Bill 1 funds.

Staff submitted a letter to SLOCOG requesting that the RTA be considered as a second Consolidated Transportation Services Agency, since we operate community-based services on behalf of the County that will not feasibly meet farebox recovery ratio requirements identified in TDA law for traditional public transit services. Specifically, the demand response / lifeline services in Shandon, Templeton and Nipomo cannot be efficiently or cost-effectively served with traditional fixed-routes. In addition, we requested that the farebox recovery ratio requirements in all three urbanized areas be reconsidered at 15% vs. the existing 20% level, as permitted under TDA law in a county under 500,000 population. We were just notified by SLOCOG that our FY17-18 “blended” farebox recovery ratio requirement has been increased to 17.36%.

Staff has developed preliminary year-end FY16-17 operating and financial results that are unaudited. The RTA’s core fixed-route ridership totaled 770,517 one-way passenger-trips as reported by the APCs. When comparing the GFI farebox data year over year, fixed-route boardings are down 7.2%. Last year’s decline was greater at 8.2%. Runabout ridership also declined just over 4.1%. Staff will continue to look for ways to reduce Runabout demand and/or reduce costs.

The farebox recovery ratio for core fixed-route services equated to 21.9%, while Runabout achieved a ratio of 4.4%. Although the RTA’s results for this performance measure are lower than in previous years and is below the SBP standard of 25%, the results are well above the 17.15% requirement established by the SLOCOG. The subsidy per passenger-trip on core fixed route services was \$4.83 and \$71.77 on Runabout, which equate to 9.0% and 3.1% annual increases (respectively). These increases are actually

lower than those experienced the previous year, and staff will continue to closely monitor this important metric. It should be noted that 17,340 Runabout trips were provided on RTA and other fixed-route services in FY16-17 through partnership agreements. When those boardings and the \$9,930.70 fare-payments are included, the overall Runabout-eligible subsidy per passenger-trip is actually \$50.87 – much more in-line with nationwide experience in larger, more-dense urban areas.

In terms of financial results, staff worked hard to keep operating and capital costs within budget in light of the declining ridership. Administrative costs equated to 92.1% of budget. Overall Service Delivery costs equated to 91.4% of budget; these costs include both day-to-day operations and vehicle maintenance activities. The greatest variance was experienced in fuel costs, but also impacted ridership as some riders chose to instead drive their personal automobiles. On the flip-side, costs related to vehicle maintenance were 28.6% above budget. Both of these variances were reported throughout the past fiscal year, and staff believes the amounts identified in the FY17-18 budget are more realistic.

The RTA is not alone in experiencing ridership declines. The American Public Transportation Association data shows that from 2014-2016 nearly every major transit system in America saw a decline in ridership. Lower fuel costs, the uptick of new transportation options from companies like Uber and Lyft, and an increase in telecommuting are often cited as reasons for this decline. While overall transit ridership is declining across America as noted above, in many cities, paratransit ridership is increasing.

Also, attached are preliminary operating and financial data for the first month of FY17-18. Ridership in July 2017 is down 5.1% in comparison to July 2016 on fixed route services. Runabout ridership was down by the same percentage year over year. The financial results are also provided, although with only one month of information no substantial variances are reported. Staff expects to bring a budget revision recommendation to the RTA Board at its November meeting to account for capital carryover projects.

Mr. Straw concluded his report.

President Compton opened to Board and public comment.

Board Member Tim Brown asked if the fuel prices will continue to increase because of the Houston disaster and how it will that affect ridership. **Mr. Straw** stated that RTA has seen little impacts from it but not sure if they will be long term.

Mr. Greening, Atascadero, stated that the impacts of the Houston disaster is delayed. He stated that if Hurricane Irma plays havoc on the south then it could be other issue in regards to fuel prices. He said that the decrease in the Runabout usage is in part to the Travel Trainer, **Ms. Carol Woodard**. He asked that if RTA was to become a CSTA would they be able to go out to bid on administrating other services in the county and what would the implications of that be.

Mr. Pete Rodgers, SLOCOG, stated relative to the farebox recovery ratio in South County we are sympathetic to the standard being fairly high. We had reduced the farebox recovery ratio for North County Dial-A-Ride services in the past. SB-1 funds changed the math on how the penalties are calculated. We are in the penalty year but have some time to evaluate it and make the changes. We

want to make sure the service is being as efficient as possible before lowering the farebox. **President Compton** asked why would it hurt to decrease the farebox recovery ratio. **Mr. Rodgers** stated that SLOCOG wants to make sure we do due diligence on all the consolidation efforts as possible.

President Compton closed Board and public comment.

A-2 Update on ITS Implementation: **Mr. Straw** stated that this a quick update on the ITS improvements. RTA has formally accepted the Connexionz system, which includes automatic Vehicle Location system, Automatic Passenger Counting system, Computer Aided Dispatch, and automatic Bus Stop Annunciation system.

The customer facing features include texting where passengers can obtain a real-time bus arrival estimate at any bus stop, as well as via the RTA and SoCo Transit apps or through our website. LCD information screens have been placed on each bus, which provides next-stop information as well as customized notices that can be remotely inputted/changed. The remaining item to be installed is a series of four Bus-Finders, which will be placed at main Cuesta College campus, SLO Student Apartments on Santa Rose Street, Government Center, and S. Higuera at Suburban.

He stated staff also updated the video camera system across all RTA, Paso Express and SoCo Transit fixed-route buses, as well as all Runabout and community dial-a-ride vans. As part of this update, staff also installed wireless access points for video downloads at the RTA bus yard, SoCo Transit bus yard and the Paso Robles Transportation Center. We also installed an eight-camera security system at the SoCo Transit bus yard in Arroyo Grande. Future ITS components include Ticket Vending Machines (TVM) in various locations throughout the county, planned Wi-Fi on buses, and possible mobile ticketing.

Mr. Straw concluded his report.

President Compton opened to Board and public comment.

Board Member Dan Rivoire asked if TVMs take credit cards. **Mr. Straw** said yes, they do take them.

President Compton closed Board and public comment.

A-3 Implementation of TDA Triennial Performance Audit Recommendations: **Mr. Straw** stated that at SLOCOG's August 2, 2017 meeting, the Board accepted the Triennial Performance Audit reports for RTA and SoCo Transit. The findings and recommendations for both agencies are provided at the end of this staff report. RTA staff provided a more detailed set of responses to each draft finding and recommendation to SLOCOG staff in several correspondence in May 2017, and we will work with SLOCOG staff to address any actionable deficiencies.

Of particular interest is the first item in the SoCo Transit TPA, since it will ultimately require action by both the RTA and SoCo Transit Boards which is the consideration of consolidation between SoCo Transit and RTA.

The primary reasons to consider consolidation include elimination of redundancy, reduce rider confusion, and to address SoCo Transit's inability to achieve the recently-implemented 20% farebox recovery ratio requirement. Also, there would be cost savings by reducing duplication fees. Some drawbacks to the consolidation would be the incremental reduce RTA farebox recovery ratio results. However, an important consideration is how future cost increases and recent declining ridership trends across the United States could impact RTA's FRR over time. In particular, the planned California minimum wage increases and the trend of rising liability costs will result in overall higher costs of doing business for RTA and SoCo Transit. Another cost impact is health insurance because we would be required to cover more employees. Further analysis is required by RTA and SLOCOG staff in the coming months to determine the net impact of consolidation to the region as a whole.

There are four RTA TPA Recommendations that are more detailed in the staff report. Integrated system analysis, analyze the integration of current services and assess most efficient and effective ways to serve populations in service corridors. Runabout productivity, continue to improve the efficiency and effectiveness of Runabout. Public outreach, enhance public participation, customer service, and marketing. Lastly, organizational realignment, realign responsibilities to augment RTA's organizational capabilities and oversight.

Mr. Straw concluded his report.

President Compton opened Board and public comment.

Board Member Ed Waage asked what the timeline would be for the consolidation. **Mr. Straw** stated he believes the timeline will be about 18 months or longer.

Mr. Rodgers, SLOCOG, stated that he agrees with 99% of the recommendations from **Mr. Straw** and his responses. He appreciates him bringing back the responses so early to the Board and trying to cut out some of the duplication. SLOCOG will be working with staff as we move forward.

Mr. Greening, Atascadero, asked if the consultants have come up with any specific details as it relates to the shortcomings. He also asked how would more seamless service be integrated when consolidation occurs.

President Compton closed Board and public comment

B. ACTION AGENDA:

B-1 Public Hearing: Consider Certification of CEQA IS/MND Report & NEPA Categorical Exclusion for RTA Maintenance Facility Project: Mr. Straw stated that this has been a long process. The current lease ends February 22, 2022, and the property owner has indicated his intention to redevelop the property when the lease ends. As such, a new administration, operations, and maintenance facility is needed. At its July 13, 2017 meeting, the RTA Board accepted the draft Initial Study – Mitigated Negative Declaration document for the RTA Bus Maintenance Facility and directed staff to begin the minimum 30-day public input process. The Board also accepted the draft request letter to the Federal Transit Administration for a Categorical Exclusion determination.

Following acceptance of the draft IS-MND document by the RTA Board, staff submitted the document package to the State Clearinghouse. The official State Clearinghouse comment period began on July 20, 2017, when the IS-MND was posted for a 30-day period. On August 21, 2017, RTA staff received confirmation from the State Clearinghouse that no comments were provided by State agencies by the August 18, 2017 deadline. FTA comment was received and addressed in final MND report and Categorical Exclusion request letter. No other requests were fielded from the public or any other governmental agency to obtain copies of the draft IS-MND report.

He requested that the Board adopt the Final Mitigated Negative Declaration, adopt the Mitigation Monitoring/Reporting Program, and direct staff to pursue the project by procuring design and engineering services.

Mr. Straw concluded his report.

President Compton opened Board and public comment.

Vice President Irons asked if the mitigated document mentioned anything about lighting in regards to the airport being close. **Mr. Straw** stated that Airport Land Use Commission did not comment about it.

President Compton closed Board and public comment.

Board Member O'Malley moved to approve the Agenda Item B-1. **Board Member Gibson** seconded, and the motion carried on a roll call vote.

B-2 Public Hearing: Disadvantaged Business Enterprise Plan Update: **Ms. Tania Arnold** stated that as part of the goal methodology update the draft revision is subject to a thirty-day public review period, which began on August 2, 2017. The Disadvantaged Business Enterprise Program is established to seek ready, willing, and able DBE firm participation in FTA-funded programs. The current RTA DBE program was adopted in May 2015. The new policy would go into effect October 2017 and end September 2020. There are some new rules that guide the methodology for determining DBE goal. The recommended new goal is 5.1%, which is increased largely due to the building of the new facility because we will be going after grant funds. This review period concludes today. RTA provided notices to the agencies included in the draft methodology update to solicit feedback. Public notice was also published in the Tribune in English and Spanish to solicit public comments. The draft goal has been submitted to FTA and is under their review. Staff did not receive any feedback during the thirty-day public review period.

Ms. Arnold concluded her report.

President Compton opened Board and public comment.

President Compton closed Board and public comment.

Board Member Brown moved to approve the Agenda Item B-2. **Board Member Ed Waage** seconded, and the motion carried on a voice vote.

B-3 Authorize Staff to Procure Design/Engineering Services for Bus Maintenance Facility Project: **Mr. Straw** stated the RTA currently leases an administration, operations and maintenance facility located at 179 Cross Street in San Luis Obispo. The facility is too small for future needs, and the lease expires at the end of February 2022. The scope includes eight phases, and staff has identified sufficient funding to complete the first six tasks. Staff's recommendation is for the RTA Board to authorize procurement for the first six tasks in Phase One, and to include the final two tasks as options under Phase Two.

Phase One will be funded with \$800,000 in Federal Transit Administration Section 5307 formula funding. RTA has applied for \$1,200,000 in California Proposition 1B funding as local match to these and possible future federal funds. In order to continue the Bus Maintenance Facility development process, staff requests the Board's concurrence in authorizing the Executive Director to seek professional design and engineering services using a Request for Qualifications process.

Mr. Straw concluded his report.

President Compton opened Board and public comment.

President Compton closed Board and public comment.

Vice President Irons moved to approve the Agenda Item B-3. **Board Member Brown** seconded, and the motion carried on a voice vote.

C. CONSENT AGENDA:

- C-1 Executive Committee Meeting Minutes of June 21, 2017 (Information)
- C-2 Executive Committee Meeting Minutes of July 12, 2017 (Information)
- C-3 RTA Board Meeting Minutes of July 12, 2017 (Approve)
- C-4 RTA Board Meeting Minutes of August 2, 2017 (Approve)
- C-5 Strategic Business Plan Performance Results for FY16-17 (Receive)

Vice President Irons moved to approve the Consent Agenda. **Board Member Brown** seconded, and the motion carried on a roll call vote.

BOARD MEMBER COMMENTS: None

ADJOURNMENT: **President Compton** adjourned RTA meeting at **9:40 a.m.**

Respectfully Submitted,

Shelby Walker

RTA Administrative Assistant

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
REGIONAL TRANSIT ADVISORY COMMITTEE

July 18, 2017
DRAFT MINUTES
C-3

Members Present:

Michael Seden – Hansen (<i>Chair</i>)	City of Paso Robles
Eric Greening (<i>Vice Chair</i>)	Fixed Route Representative
Dawn Patterson	Atascadero Transit
Phil Moores	South County Transit (SoCo Transit)
Gamaliel Anguiano	SLO Transit
Cheryl Andrus	Cal Poly
Todd Katz	Fixed Route Alternate Rep.

Members Absent:

Anthony Gutierrez	Cuesta College
Pam Duffield	County of San Luis Obispo
Janeen Burlingame	Morro Bay Transit
Mark Dariz	Runabout/DAR Representative

Staff Present:

Geoff Straw	RTA
Shelby Walker	RTA
Tania Arnold	RTA

Guest:

Eliane Wilson	SLOCOG
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1. Call Meeting to Order, Roll Call:

Mr. Michael Seden-Hansen called the meeting to order at 2:05 p.m. Roll call was taken; a quorum was present.

2. Public Comments: None

3. A. Information Items

A-1 Executive Director's Report (Verbal):

Mr. Geoff Straw stated that he wanted to go over five things. First, he discussed that the RTA Board accepted the environmental document for the long-term facility. There will be a 30-day input period and will be brought to the RTA Board in September. The lease on RTA's current facility ends in 2022. We should be receiving 100% plans for the Paso Yard by the end of the week. The budget is \$855,000 and are we hoping bids stay within that. He mentioned an ITS improvement that six 'next bus' signs were ordered. Two will go in at the Government Center as well as a Ticket Vending Machine. The other four will go to different bus stop locations throughout the county. He stated that four bus finders will also be placed at different stops. One

will most likely go in at Cuesta College stop. The radio frequency for those devices does not reach to Grover Beach.

Mr. Straw stated that bus operator recruitment has been difficult. Currently, we are short 10 to 11 operators. Doing different forms of outreach, including a TV commercial and signs on the buses, to bring people in. We have met twice with the union to discuss new contract. The next training class starts September 11th.

Mr. Straw concluded his report.

Ms. Eliane Wilson asked if we have reached out to school bus drivers. **Mr. Straw** responded that RTA cannot compete with the benefits they receive.

Mr. Gamaliel Anguiano asked about student drivers. **Mr. Straw** stated that we do not experiment with students.

Mr. Eric Greening asked what the new contract length would be. **Mr. Straw** stated that it has not been decided yet.

A-2 Revisions to North Coast Services (Verbal):

Mr. Phil Moores stated that there has been changes made to the Routes 12 and 15. He said that the short turns have been eliminated and Route 12 breaks will be at the at the Government Center instead of Morro Bay Park. It will lead to better service for the Los Osos area and make connections to SLO Transit. **Mr. Greening** asked if the Cuesta College stop will be affected, if there has been any outreach or signage about the changes, and if the Route 14 will be adjusted. **Mr. Moores** stated that the Route 15 has been adjusted. **Ms. Wilson** asked what time the first bus leaves from Morro Bay Park. **Mr. Moores** stated he could not remember the exact time, he will send a copy of the new schedule to each RTAC member.

Mr. Moores mentioned that if there is an ADA appeal the committee will be trained and then the committee will hear the appeal.

Mr. Moores concluded his report.

A-3 Public Participation Plan for Proposed Changes to RTA Fare Program (Verbal):

Mr. Straw stated that is an update that was given to the RTA Board. The cash fare would go up \$.25 per zone. He stated that on page A-3-2 there is a table showing the proposed fare increases. On page A-3-5 there is an elasticity analysis that shows the net increase is 6.4% with a 3% decrease in ridership. The Runabout cap amount would be going to \$11.00. There will be a number of public outreach opportunities for people to voice their concerns or support.

Mr. Straw concluded his report.

Ms. Wilson asked why we are not increasing fares on the express runs. **Mr. Straw** stated we have not done it because it could have FTA Title VI implications. **Mr. Moores** noted the option of splitting out the express services. **Mr. Straw** stated that the FTA would need to be included. **Mr. Greening** suggested possibly having an express pass as an option.

Ms. Wilson also asked if the fares were in line with other fares for local transit. **Mr. Straw** stated that they are higher than local transit so we do not skim off SLO Transit or other transit systems.

Mr. Todd Katz emphasized the issue of finding drivers when noting the fare increase. He wants to make sure they understand that it is not funding new buses.

Ms. Wilson stated that it should be explained to riders the savings they can have buying the monthly pass over continuously paying the cash fare, maybe have a tool on the website to help people calculate the cost. **Mr. Straw** stated there has been discussion of smart media option that could come in the future. **Ms. Wilson** asked if the current fare media will expire. **Mr. Straw** stated they will not.

A-4 Member Comments/Reports from Jurisdictions (Receive):

Ms. Dawn Patterson stated that the new Dial-A-Ride vehicle was just delivered. A new housing development called the Groves coming in near Vieo Camino. They have allotted for a RTA bus stop, construction will begin in two months. She mentioned that the budget for the new dispatch software was approved.

Ms. Cheryl Andrus stated that Cal Poly freshmen will not be able to bring cars on campus; it is the largest incoming class. There will be a demo for bike share tomorrow. **Mr. Greening** asked about public comment period for the Cal Poly master plan. **Ms. Andrus** stated she will check.

Mr. Michael Seden-Hansen had no update.

Mr. Anguiano stated route changes started in June, no fare or route complaints received yet. Will look into some adjustments and they will be out by September 5, 2017. There is a two-year contract with Cal Poly. He also mentioned that the General Manager of First Transit will be retiring in October and Dee Lawson will be retiring in January.

Mr. Phil Moores stated that negotiations on the CBA for RTA are taking place and hoping for a similar agreement for SoCo Transit. The Five Cities Shuttle Service will be moving from Ride-on to Ventura Transit System, and they are charging good rate. SoCo Transit is doing well with driver retention, but they do rely on RTA extra boards for help. **Mr. Greening** asked how the audit recommendation of consolidation affects the farebox ratio. **Mr. Straw** stated that it is small, RTA's would go up but SoCo Transit would go down from the current levels.

Mr. Greening stated that he has gotten great rides and morale seems to be up. He said the bus operators did an excellent job maintaining service when there were fires on the grade. He asked if youth riders need to show documentation of being in K-12. **Mr. Moores** stated that trust is the best policy. **Mr. Straw** stated that there is no need; we do not need to cause conflict in regards to fares.

C. Consent Agenda Items:

C-1 RTAC Minutes of April 19, 2017 (Approve)

Mr. Greening moved to approve the minutes and **Ms. Patterson** seconded. The motion carried on a voice vote.

D. Adjournment:

Mr. Seden-Hansen adjourned the meeting at 3:33 p.m.

Next RTAC Meeting: October 19, 2017 at 2:00 p.m.

Respectfully Submitted:

Shelby Walker
Administrative Assistant
San Luis Obispo Regional Transit Authority

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

NOVEMBER 1, 2017

STAFF REPORT

AGENDA ITEM: C-4

TOPIC: Transit Asset Management (TAM) Plan and Goal

PRESENTED BY: Geoff Straw, Executive Director

STAFF RECOMMENDATION: Approve Submittal of TAM Plan and Goal to the Federal Transit Administration (FTA)

BACKGROUND/DISCUSSION:

Every agency must develop a transit asset management (TAM) plan if it owns, operates, or manages capital assets used to provide public transportation and receives federal financial assistance under 49 U.S.C. Chapter 53 as a recipient or subrecipient. Each transit provider must designate an Accountable Executive (49 CFR 625.5) to ensure appropriate resources for implementing the agency's TAM plan. There two tiers for agencies that covers nine elements. Tier I agencies must comply with all nine elements of the TAM plan. Tier II agencies are responsible only for the top four elements. RTA falls under Tier II and has to meet the following four elements:

1. An inventory of asset - A register of capital assets and information about those assets.
2. A condition assessment of inventoried assets - A rating of the assets' physical state; to be completed for assets an agency has direct capital responsibility for; should be at a level of detail sufficient to monitor and predict performance of inventoried assets
3. Description of a decision support tool - An analytic process or tool that (1) assists in capital asset investment prioritization and/or (2) estimates capital needs over time *does not necessarily mean software*
4. A prioritized list of investments - A prioritized list of projects or programs to manage or improve the SGR of capital assets

Transit Asset Management (TAM) Plan

RTA's Strategic Business Plan set our goal for all revenue vehicles to be no more than 40% beyond the FTA-defined useful life standard in terms of years or miles. There is one exception of the existing over-the-road buses, there are no plans to replace these vehicles at the current time. Equipment goal is set based on current age and when the replacement is tentative to take place.

Staff recommendation

Approve Submittal of TAM Plan and Goal to the Federal Transit Administration (FTA).

San Luis Obispo Regional Transit Authority Transit Asset Management Plan

Tania Arnold, Accountable Executive

Last modified by Omar McPherson on 25 Oct 17 at 12:48

Introduction

RTA is a Joint Powers Authority formed in 1989 that serves and connects various communities within San Luis Obispo County and nearby cities. Regional fixed route and paratransit services throughout the region (including within the city of San Luis Obispo) are managed by RTA. In addition, RTA is contracted by SLO County to operate community-based services in unincorporated areas (primarily in Nipomo, Shandon and Templeton), and by the City of Paso Robles to operate the Paso Express fixed route services and the Paso Robles Dial-A-Ride service. RTA also provides administrative oversight of the SoCo Transit fixed route services in the Five Cities area. The RTA Board of Directors consists of a representative from all of the cities in which transportation services are provided, as well as all five San Luis Obispo County Supervisors, while the Regional Transportation Advisory Committee (RTAC) meets quarterly and provides advice to the RTA Board. Services have been directly operated by RTA employees since 2009, when the previously contracted services were brought in-house. RTA's Fleet standards is to replace 100% of all revenue vehicles no more than 40% beyond the FTA-defined useful life standard in terms of years or miles.

Performance Targets & Measures

Asset Category - Performance Measure	Asset Class	2018 Target	2019 Target	2020 Target	2021 Target	2022 Target
REVENUE VEHICLES						
Age - % of revenue vehicles within a particular asset class that have met or exceeded their Useful Life Benchmark (ULB)	AB - Articulated Bus	N/A				
	AO - Automobile	N/A				
	BR - Over-the-road Bus	100%	100%	100%	100%	100%
	BU - Bus	40%	40%	40%	40%	40%
	CU - Cutaway Bus	40%	40%	40%	40%	40%
	DB - Double Decked Bus	N/A				
	FB - Ferryboat	N/A				
	MB - Mini-bus	40%	40%	40%	40%	40%
	MV - Mini-van	40%	40%	40%	40%	40%
	RT - Rubber-tire Vintage Trolley	40%	40%	40%	40%	40%
	SB - School Bus	N/A				
	SV - Sport Utility Vehicle	N/A				
	TB - Trolleybus	N/A				
	VN - Van	N/A				
	Custom 1	N/A				
	Custom 2	N/A				
	Custom 3	N/A				
EQUIPMENT						
Age - % of vehicles that have met or exceeded their Useful Life Benchmark (ULB)	Non Revenue/Service Automobile	25%	25%	30%	40%	40%
	Steel Wheel Vehicles	N/A				
	Trucks and other Rubber Tire Vehicles	25%	25%	30%	40%	40%
	Custom 1	N/A				
	Custom 2	N/A				
	Custom 3	N/A				
FACILITIES						
Condition - % of facilities with a condition rating below 3.0 on the FTA Transit Economic Requirements Model (TERM) Scale	Administration	N/A				
	Maintenance	N/A				
	Parking Structures	N/A				
	Passenger Facilities	N/A				
	Custom 1	N/A				
	Custom 2	N/A				
	Custom 3	N/A				

Target Setting Methodology

Base on our Strategic Business Plan we set our goal for all revenue vehicles to be no more than 40% beyond the FTA-defined useful life standard in terms of years or miles. There is one exception of the existing over-the-road buses, there are no plans to replace these vehicles at the current time. Equipment goal is set based on current age and when the replacement is tentative to take place.

Capital Asset Inventory

Please see Appendix A (Asset Register) for the asset inventory listing.

Asset Inventory Summary

Asset Category	Total Number	Avg Age	Avg Mileage	Avg Value
Revenue Vehicles	72	5.0	196,979	\$317,777.78
AB - Articulated Bus	0	-	-	-
AO - Automobile	0	-	-	-
BR - Over-the-road Bus	4	17.0	329,649	\$700,000.00
BU - Bus	32	6.5	329,770	\$520,000.00
CU - Cutaway Bus	13	2.8	100,866	\$80,000.00
DB - Double Decked Bus	0	-	-	-
FB - Ferryboat	0	-	-	-
MB - Mini-bus	6	4.8	87,221	\$200,000.00
MV - Mini-van	15	1.0	25,467	\$52,000.00
RT - Rubber-tire Vintage Trolley	2	3.5	47,325	\$210,000.00
SB - School Bus	0	-	-	-
SV - Sport Utility Vehicle	0	-	-	-
TB - Trolleybus	0	-	-	-
VN - Van	0	-	-	-
Custom 1	0	-	-	-
Custom 2	0	-	-	-
Custom 3	0	-	-	-
Equipment	17	3.6	61,055	\$29,941.18
Non Revenue/Service Automobile	12	3.3	66,052	\$30,250.00
Steel Wheel Vehicles	0	-	-	-
Trucks and other Rubber Tire Vehicles	5	4.6	49,061	\$29,200.00
Custom 1	0	-	-	-
Custom 2	0	-	-	-
Custom 3	0	-	-	-
Facilities	0	-	N/A	-
Administration	0	-	N/A	-
Maintenance	0	-	N/A	-
Parking Structures	0	-	N/A	-
Passenger Facilities	0	-	N/A	-
Custom 1	0	-	N/A	-
Custom 2	0	-	N/A	-
Custom 3	0	-	N/A	-

Condition Assessment

Please see Appendix B (Asset Condition Data) for individual asset condition listing.

Asset Condition Summary

Asset Category	Total Number	Avg Age	Avg Mileage	Avg TERM Condition	Avg Value	% At or Past ULB
Revenue Vehicles	72	5.0	196,979	N/A	\$317,777.78	18%
AB - Articulated Bus	0	-	-	N/A	-	-
AO - Automobile	0	-	-	N/A	-	-
BR - Over-the-road Bus	4	17.0	329,649	N/A	\$700,000.00	100%
BU - Bus	32	6.5	329,770	N/A	\$520,000.00	25%
CU - Cutaway Bus	13	2.8	100,866	N/A	\$80,000.00	0%
DB - Double Decked Bus	0	-	-	N/A	-	-
FB - Ferryboat	0	-	-	N/A	-	-
MB - Mini-bus	6	4.8	87,221	N/A	\$200,000.00	17%
MV - Mini-van	15	1.0	25,467	N/A	\$52,000.00	0%
RT - Rubber-tire Vintage Trolley	2	3.5	47,325	N/A	\$210,000.00	0%
SB - School Bus	0	-	-	N/A	-	-
SV - Sport Utility Vehicle	0	-	-	N/A	-	-
TB - Trolleybus	0	-	-	N/A	-	-
VN - Van	0	-	-	N/A	-	-
Custom 1	0	-	-	N/A	-	-
Custom 2	0	-	-	N/A	-	-
Custom 3	0	-	-	N/A	-	-
Equipment	17	3.6	61,055	N/A	\$29,941.18	24%
Non Revenue/Service Automobile	12	3.3	66,052	N/A	\$30,250.00	25%
Steel Wheel Vehicles	0	-	-	N/A	-	-
Trucks and other Rubber Tire Vehicles	5	4.6	49,061	N/A	\$29,200.00	20%
Custom 1	0	-	-	N/A	-	-
Custom 2	0	-	-	N/A	-	-
Custom 3	0	-	-	N/A	-	-
Facilities	0	-	N/A	-	-	N/A
Administration	0	-	N/A	-	-	N/A
Maintenance	0	-	N/A	-	-	N/A
Parking Structures	0	-	N/A	-	-	N/A
Passenger Facilities	0	-	N/A	-	-	N/A
Custom 1	0	-	N/A	-	-	N/A
Custom 2	0	-	N/A	-	-	N/A
Custom 3	0	-	N/A	-	-	N/A

Decision Support

Investment Prioritization

RTA uses the Fleet replacement Module to justify the investment priority process.

Decision Support Tools

The following tools are used in making investment decisions:

Process/Tool	Brief Description
Fleet replacement Module	Fleet replacement module was used to generation the replacement of fleet based on there usefull life and condition of fleet over the next five years.

Investment Prioritization

The list of prioritized investment projects is provided in Appendix C.

Appendices

[Appendix A](#)

[Appendix B1](#)

[Appendix B2](#)

[Appendix B3](#)

[Appendix C](#)

[Appendix D](#)

Asset Register

Revenue Vehicle (Rolling Stock) Condition Data

Equipment Condition Data

Facilities Condition Data

Proposed Investment Project List

Fleet Replacement Module Output

Appendix A: Asset Register

Asset Category	Asset Class	Asset Name	Make	Model	Count	ID/Serial No.	Asset Owner	Acquisition Year	Vehicle Mileage	Replacement Cost/Value
Equipment	Non Revenue/Service Automobile	506 HONDA		CIVIC HYBRID	1	1JHMFA3F27AS000891	SLO RTA	2009	66,107	\$30,000.00
Equipment	Non Revenue/Service Automobile	513 FORD		FOCUS	1	1FADP3E24EL255951	SLO RTA	2014	54,859	\$15,000.00
Equipment	Non Revenue/Service Automobile	514 FORD		FOCUS	1	1FADP3E22EL255950	SLO RTA	2014	71,469	\$15,000.00
Equipment	Non Revenue/Service Automobile	515 FORD		FOCUS	1	1FADP3E26EL255952	SLO RTA	2014	69,452	\$15,000.00
Equipment	Non Revenue/Service Automobile	516 DODGE		GRAND CARAVAN	1	1C27WDGBG4ER427019	SCT	2014	43,433	\$52,000.00
Equipment	Non Revenue/Service Automobile	517 DODGE		GRAND CARAVAN	1	1C27WDGBG0ER432170	SCT	2014	16,193	\$52,000.00
Equipment	Non Revenue/Service Automobile	518 FORD		ESCAPE	1	1FMCU0F79FUA82166	SLO RTA	2015	54,838	\$20,000.00
Equipment	Non Revenue/Service Automobile	519 FORD		ESCAPE	1	1FMCU0F7FUA82167	SLO RTA	2015	89,114	\$20,000.00
Equipment	Non Revenue/Service Automobile	520 FORD		ESCAPE	1	1FMCU0F72FUA82168	SLO RTA	2015	17,695	\$20,000.00
Equipment	Non Revenue/Service Automobile	521 FORD		ESCAPE	1	1FMCU0F71HUB03417	SLO RTA	2017	15,500	\$20,000.00
Equipment	Non Revenue/Service Automobile	1201 DODGE		BRAUN	1	12D4RN4DG7BR794997	SLO RTA	2012	163,100	\$52,000.00
Equipment	Non Revenue/Service Automobile	1203 DODGE		BRAUN	1	12C4RDG8G6GC180660	SLO RTA	2012	130,864	\$52,000.00
Equipment	Trucks and other Rubber Tire Vehicles	504 DODGE		RAM 2500	1	13B6KC26292M250794	SCT	2002	171,696	\$32,000.00
Equipment	Trucks and other Rubber Tire Vehicles	511 FORD		F-250	1	1FT7X2A60EEB27771	SLO RTA	2014	38,658	\$25,000.00
Equipment	Trucks and other Rubber Tire Vehicles	512 FORD		F-250	1	1FD7X2A62EEB27850	SLO RTA	2014	22,323	\$32,000.00
Equipment	Trucks and other Rubber Tire Vehicles	522 FORD		F-250	1	1FD7X2A66GED42246	SLO RTA	2016	12,593	\$32,000.00
Equipment	Trucks and other Rubber Tire Vehicles	523 Toyota		forklift	1	67498	SLO RTA	2016	36	\$25,000.00
RevenueVehicles	BR - Over-the-road Bus	635 MCI		102-DL3	1	1M8PDMPPA8YPO52439	SLO RTA	2000	393,592	\$700,000.00
RevenueVehicles	BR - Over-the-road Bus	637 MCI		102-DL3	1	1M8PDMPPA6YPO52441	SLO RTA	2000	389,693	\$700,000.00
RevenueVehicles	BR - Over-the-road Bus	638 MCI		102-DL3	1	1M8PDMPPA8YPO52442	SLO RTA	2000	142,453	\$700,000.00
RevenueVehicles	BR - Over-the-road Bus	644 MCI		102-DL3	1	1M8PDMPPA9YPO52448	SLO RTA	2000	392,858	\$700,000.00
RevenueVehicles	BU - Bus	159 GILLIG		PHANTOM	1	15GCD201831112333	SLO RTA	2003	647,859	\$520,000.00
RevenueVehicles	BU - Bus	161 GILLIG		PHANTOM	1	15GCD201931112339	SLO RTA	2003	725,591	\$520,000.00
RevenueVehicles	BU - Bus	162 GILLIG		PHANTOM	1	15GCD201331112336	SLO RTA	2003	668,460	\$520,000.00
RevenueVehicles	BU - Bus	163 GILLIG		PHANTOM	1	15GCD201531112337	SLO RTA	2003	713,412	\$520,000.00
RevenueVehicles	BU - Bus	164 GILLIG		PHANTOM	1	15GCD201331112338	SLO RTA	2003	662,981	\$520,000.00
RevenueVehicles	BU - Bus	165 GILLIG		PHANTOM	1	15GCD20131112335	SLO RTA	2003	734,716	\$520,000.00
RevenueVehicles	BU - Bus	167 GILLIG		PHANTOM	1	15GCD27181112915	SLO RTA	2008	474,939	\$520,000.00
RevenueVehicles	BU - Bus	168 GILLIG		PHANTOM	1	15GCD271381112916	SLO RTA	2008	477,214	\$520,000.00
RevenueVehicles	BU - Bus	201 GILLIG		PHANTOM	1	15GCB201931112329	SCT	2003	538,869	\$520,000.00
RevenueVehicles	BU - Bus	204 GILLIG		PHANTOM	1	15GCB201731112331	SCT	2003	559,443	\$520,000.00
RevenueVehicles	BU - Bus	1011 THOR		EZ RIDER	1	1N9MMACL2AC084310	SCT	2010	239,722	\$520,000.00
RevenueVehicles	BU - Bus	1012 THOR		EZ RIDER	1	1N9MMACL4AC084311	SCT	2010	177,043	\$520,000.00
RevenueVehicles	BU - Bus	1101 EL DORADO		BRT	1	1N9APACL6AC084207	SLO RTA	2011	177,459	\$520,000.00
RevenueVehicles	BU - Bus	1301 GILLIG		LOW FLOOR	1	15GGD2714D1182291	SLO RTA	2013	251,755	\$520,000.00
RevenueVehicles	BU - Bus	1302 GILLIG		LOW FLOOR	1	15GGD2716D1182292	SLO RTA	2013	224,465	\$520,000.00
RevenueVehicles	BU - Bus	1303 GILLIG		LOW FLOOR	1	15GGD2718D1182293	SLO RTA	2013	275,403	\$520,000.00
RevenueVehicles	BU - Bus	1304 GILLIG		LOW FLOOR	1	15GGD271XD1182294	SLO RTA	2013	252,131	\$520,000.00

Asset Category	Asset Class	Asset Name	Make	Model	Count	ID/Serial No.	Asset Owner	Acquisition Year	Vehicle Mileage	Replacement Cost/Value
RevenueVehicles	BU - Bus	1305 GILLIG		LOW FLOOR	1	15GGD2711D1182295	SLO RTA	2013	224,818	\$520,000.00
RevenueVehicles	BU - Bus	1306 GILLIG		LOW FLOOR	1	15GGD2713D1182296	SLO RTA	2013	252,143	\$520,000.00
RevenueVehicles	BU - Bus	1307 GILLIG		LOW FLOOR	1	15GGD2715D1182297	SLO RTA	2013	261,103	\$520,000.00
RevenueVehicles	BU - Bus	1308 GILLIG		LOW FLOOR	1	15GGG8271XD1182298	SCOT	2013	211,419	\$520,000.00
RevenueVehicles	BU - Bus	1309 GILLIG		LOW FLOOR	1	15GGG82711D1182299	SCOT	2013	183,807	\$520,000.00
RevenueVehicles	BU - Bus	1310 GILLIG		LOW FLOOR	1	15GGG82714D1182300	SCOT	2013	192,062	\$520,000.00
RevenueVehicles	BU - Bus	1501 GILLIG		LOW FLOOR	1	15GGD2719F1184847	SLO RTA	2015	163,823	\$520,000.00
RevenueVehicles	BU - Bus	1502 GILLIG		LOW FLOOR	1	15GGD2710F1184848	SLO RTA	2015	165,230	\$520,000.00
RevenueVehicles	BU - Bus	1503 GILLIG		LOW FLOOR	1	15GGD2712F1184849	SLO RTA	2015	167,574	\$520,000.00
RevenueVehicles	BU - Bus	1504 GILLIG		LOW FLOOR	1	15GGD2719F1184850	SLO RTA	2015	160,036	\$520,000.00
RevenueVehicles	BU - Bus	1505 GILLIG		LOW FLOOR	1	15GGD2710F1184851	SLO RTA	2015	163,426	\$520,000.00
RevenueVehicles	BU - Bus	1506 GILLIG		LOW FLOOR	1	15GGD2712F1184852	SLO RTA	2015	169,001	\$520,000.00
RevenueVehicles	BU - Bus	1507 GILLIG		LOW FLOOR	1	15GGD2714F1184853	SLO RTA	2015	162,662	\$520,000.00
RevenueVehicles	BU - Bus	1508 GILLIG		LOW FLOOR	1	15GGD2716F1184854	SLO RTA	2015	150,580	\$520,000.00
RevenueVehicles	BU - Bus	1509 GILLIG		LOW FLOOR	1	15GGG82710F1184855	SCOT	2015	123,492	\$520,000.00
RevenueVehicles	CU - Cutaway Bus	1204 FORD		STARCRRAFT E450	1	1FDFE4F53CD824669	SLO RTA	2012	103,619	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1401 FORD		STARCRRAFT E450	1	1FDFE4F50EDB10458	SLO RTA	2014	120,809	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1402 FORD		STARCRRAFT E450	1	1FDFE4F54EDB10461	SLO RTA	2014	113,523	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1403 FORD		STARCRRAFT E450	1	1FDFE4F54E4D810456	SLO RTA	2014	109,866	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1404 FORD		STARCRRAFT E450	1	1FDFE4F52EDB10457	SLO RTA	2014	115,203	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1405 FORD		STARCRRAFT E450	1	1FDFE4F53EDB10449	SLO RTA	2014	116,005	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1406 FORD		STARCRRAFT E450	1	1FDFE4F59EDB18071	SLO RTA	2014	106,020	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1407 FORD		STARCRRAFT E450	1	1FDFE4F52EDB18073	SLO RTA	2014	104,166	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1408 FORD		STARCRRAFT E450	1	1FDFE4F57EDB18067	SLO RTA	2014	101,124	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1510 FORD		STARCRRAFT E450	1	1FDFE4F50GDC08468	SLO RTA	2015	116,154	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1511 FORD		STARCRRAFT E450	1	1FDFE4F54GDC09025	SLO RTA	2015	45,410	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1512 FORD		STARCRRAFT E450	1	1FDFE4F55GDC08448	SLO RTA	2015	117,621	\$80,000.00
RevenueVehicles	CU - Cutaway Bus	1608 FORD		STARCRRAFT E450	1	1FDFE4F53GDC45434	SLO RTA	2016	41,736	\$80,000.00
RevenueVehicles	MB - Mini-bus	723 CHEVY		EL DORADO	1	1G8G5V1939F406668	SLO RTA	2009	155,791	\$200,000.00
RevenueVehicles	MB - Mini-bus	724 FORD SD		EL DORADO	1	1FDUF5GT9CEA43719	SLO RTA	2012	72,763	\$200,000.00
RevenueVehicles	MB - Mini-bus	725 INTERNATIONAL		EL DORADO	1	1SWEASAAAM3DH361877	SLO RTA	2013	70,451	\$200,000.00
RevenueVehicles	MB - Mini-bus	726 INTERNATIONAL		EL DORADO	1	1SWEASAAAM5DH361878	SLO RTA	2013	69,525	\$200,000.00
RevenueVehicles	MB - Mini-bus	727 INTERNATIONAL		EL DORADO	1	1SWEASAAAM7DH361879	SLO RTA	2013	75,339	\$200,000.00
RevenueVehicles	MB - Mini-bus	728 INTERNATIONAL		EL DORADO	1	1SWEASAAAM3DH361880	SLO RTA	2013	79,454	\$200,000.00
RevenueVehicles	MV - Mini-van	729 DODGE		BRAUN ENTRAVAN	1	12C4RDG8G8DR787211	SLO RTA	2013	39,916	\$52,000.00
RevenueVehicles	MV - Mini-van	730 DODGE		BRAUN ENTRAVAN	1	12C4RDG8G8DR787212	SLO RTA	2013	40,437	\$52,000.00
RevenueVehicles	MV - Mini-van	1601 DODGE		BRAUN	1	12C7WDG8G8FR642808	SLO RTA	2016	25,801	\$52,000.00
RevenueVehicles	MV - Mini-van	1602 DODGE		BRAUN	1	12C7WDG8G8FR652138	SLO RTA	2016	27,954	\$52,000.00
RevenueVehicles	MV - Mini-van	1603 DODGE		BRAUN	1	12C7WDG8G8FR652141	SLO RTA	2016	27,649	\$52,000.00
RevenueVehicles	MV - Mini-van	1604 DODGE		BRAUN	1	12C7WDG8G8FR652150	SLO RTA	2016	31,513	\$52,000.00
RevenueVehicles	MV - Mini-van	1605 DODGE		BRAUN	1	12C7WDG8G8FR652155	SLO RTA	2016	29,740	\$52,000.00
RevenueVehicles	MV - Mini-van	1606 DODGE		BRAUN	1	12C7WDG8G8FR642789	SLO RTA	2016	38,771	\$52,000.00
RevenueVehicles	MV - Mini-van	1607 DODGE		BRAUN	1	12C7WDG8G8FR642792	SLO RTA	2016	33,929	\$52,000.00
RevenueVehicles	MV - Mini-van	1701 DODGE		BRAUN	1	12C7WDG8G8FR396495	SLO RTA	2017	13,511	\$52,000.00
RevenueVehicles	MV - Mini-van	1702 DODGE		BRAUN	1	12C7WDG8G8FR396500	SLO RTA	2017	16,069	\$52,000.00
RevenueVehicles	MV - Mini-van	1703 DODGE		BRAUN	1	12C7WDG8G8FR396504	SLO RTA	2017	15,372	\$52,000.00
RevenueVehicles	MV - Mini-van	1704 DODGE		BRAUN	1	12C7WDG8G8FR396508	SLO RTA	2017	14,710	\$52,000.00
RevenueVehicles	MV - Mini-van	1705 DODGE		BRAUN	1	12C7WDG8G8FR396514	SLO RTA	2017	15,944	\$52,000.00
RevenueVehicles	MV - Mini-van	1706 DODGE		BRAUN	1	12C7WDG8G8FR396519	SLO RTA	2017	10,688	\$52,000.00
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1013 DOUBLE K		VILLAGER	1	1F66F5DY7B0A04333	SLO RTA	2010	89,206	\$210,000.00

Asset Category	Asset Class	Asset Name	Make	Model	Count	ID/Serial No.	Asset Owner	Acquisition Year	Vehicle Mileage	Replacement Cost/Value
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1707	DOUBLE K	VILLAGER	1	1F56F5DY0H0A10659	SLO RTA	2017	5,443	\$210,000.00

Appendix B: Asset Condition Data

B1: Revenue Vehicle Assets

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	Vehicle Mileage	Replacement Cost/Value	Useful Life Benchmark (Yrs)	Past Useful Life Benchmark
RevenueVehicles	BR - Over-the-road Bus	635	1	1M8PDMIPA8YP052439	17	393,592	\$700,000.00	12	Yes
RevenueVehicles	BR - Over-the-road Bus	637	1	1M8PDMIPA6YP052441	17	389,693	\$700,000.00	12	Yes
RevenueVehicles	BR - Over-the-road Bus	638	1	1M8PDMIPA8YP052442	17	142,453	\$700,000.00	12	Yes
RevenueVehicles	BR - Over-the-road Bus	644	1	1M8PDMIPA9YP052448	17	392,858	\$700,000.00	12	Yes
RevenueVehicles	BU - Bus	159	1	15GCD201831112333	14	647,859	\$520,000.00	12	Yes
RevenueVehicles	BU - Bus	161	1	15GCD201931112339	14	725,591	\$520,000.00	12	Yes
RevenueVehicles	BU - Bus	162	1	15GCD201331112336	14	668,460	\$520,000.00	12	Yes
RevenueVehicles	BU - Bus	163	1	15GCD201531112337	14	713,412	\$520,000.00	12	Yes
RevenueVehicles	BU - Bus	164	1	15GCD201331112338	14	662,981	\$520,000.00	12	Yes
RevenueVehicles	BU - Bus	165	1	15GCD201131112335	14	734,716	\$520,000.00	12	Yes
RevenueVehicles	BU - Bus	167	1	15GCD271181112915	9	474,939	\$520,000.00	12	No
RevenueVehicles	BU - Bus	168	1	15GCD271381112916	9	477,214	\$520,000.00	12	No
RevenueVehicles	BU - Bus	201	1	15GCB201931112329	14	538,869	\$520,000.00	12	Yes
RevenueVehicles	BU - Bus	204	1	15GCB201731112331	14	559,443	\$520,000.00	12	Yes
RevenueVehicles	BU - Bus	1011	1	1N9MMACL2AC084310	7	239,722	\$520,000.00	10	No
RevenueVehicles	BU - Bus	1012	1	1N9MMACL4AC084311	7	177,043	\$520,000.00	10	No
RevenueVehicles	BU - Bus	1101	1	1N9APACL6AC084207	6	177,459	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1301	1	15GGD2714D1182291	4	251,755	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1302	1	15GGD2716D1182292	4	224,465	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1303	1	15GGD2718D1182293	4	275,403	\$520,000.00	12	No

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	Vehicle Mileage	Replacement Cost/Value	Useful Life Benchmark (Yrs)	Past Useful Life Benchmark
RevenueVehicles	BU - Bus	1304	1	15GGD271XD1182294	4	252,131	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1305	1	15GGD2711D1182295	4	224,818	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1306	1	15GGD2713D1182296	4	252,143	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1307	1	15GGD2715D1182297	4	261,103	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1308	1	15GGB271XD1182298	4	211,419	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1309	1	15GGB2711D1182299	4	183,807	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1310	1	15GGB2714D1182300	4	192,062	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1501	1	15GGD2719F1184847	2	163,823	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1502	1	15GGD2710F1184848	2	165,230	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1503	1	15GGD2712F1184849	2	167,574	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1504	1	15GGD2719F1184850	2	160,036	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1505	1	15GGD2710F1184851	2	163,426	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1506	1	15GGD2712F1184852	2	169,001	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1507	1	15GGD2714F1184853	2	162,662	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1508	1	15GGD2716F1184854	2	150,580	\$520,000.00	12	No
RevenueVehicles	BU - Bus	1509	1	15GGB2710F1184855	2	123,492	\$520,000.00	12	No
RevenueVehicles	CU - Cutaway Bus	1204	1	1FDFE4F3CDB24669	5	103,619	\$80,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	1401	1	1FDFE4F50EDB10458	3	120,809	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1402	1	1FDFE4F54EDB10461	3	113,523	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1403	1	1FDFE4F54EDB10456	3	109,866	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1404	1	1FDFE4F52EDB10457	3	115,203	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1405	1	1FDFE4F53EDB10449	3	116,005	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1406	1	1FDFE4F59EDB18071	3	106,020	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1407	1	1FDFE4F52EDB18073	3	104,166	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1408	1	1FDFE4F57EDB18067	3	101,124	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1510	1	1FDFE4F50GDC08468	2	116,154	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1511	1	1FDFE4F54GDC09025	2	45,410	\$80,000.00	7	No

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	Vehicle Mileage	Replacement Cost/Value	Useful Life Benchmark (Yrs)	Past Useful Life Benchmark
RevenueVehicles	CU - Cutaway Bus	1512	1	1FDFE4FS5GDC08448	2	117,621	\$80,000.00	5	No
RevenueVehicles	CU - Cutaway Bus	1608	1	1FDFE4FS3GDC45434	1	41,736	\$80,000.00	7	No
RevenueVehicles	MB - Mini-bus	723	1	1GBG5V1939F406668	8	155,791	\$200,000.00	7	Yes
RevenueVehicles	MB - Mini-bus	724	1	1FDUF5GT9CEA43719	5	72,763	\$200,000.00	7	No
RevenueVehicles	MB - Mini-bus	725	1	5WEASAAAM3DH36187	4	70,451	\$200,000.00	7	No
RevenueVehicles	MB - Mini-bus	726	1	5WEASAAAM5DH36187	4	69,525	\$200,000.00	7	No
RevenueVehicles	MB - Mini-bus	727	1	5WEASAAAM7DH36187	4	75,339	\$200,000.00	7	No
RevenueVehicles	MB - Mini-bus	728	1	5WEASAAAM3DH36188	4	79,454	\$200,000.00	7	No
RevenueVehicles	MV - Mini-van	729	1	1C4RDG8G8DR787211	4	39,916	\$52,000.00	5	No
RevenueVehicles	MV - Mini-van	730	1	1C4RDG8G8DR787212	4	40,437	\$52,000.00	5	No
RevenueVehicles	MV - Mini-van	1601	1	1C27WDGBG8FR642808	1	25,801	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1602	1	1C27WDGBG6FR652138	1	27,954	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1603	1	1C27WDGBG6FR652141	1	27,649	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1604	1	1C27WDGBG7FR652150	1	31,513	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1605	1	1C27WDGBG6FR652155	1	29,740	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1606	1	1C27WDGBG8FR642789	1	38,771	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1607	1	1C27WDGBG8FR642792	1	33,929	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1701	1	2C7WDGBG7GR39649		13,511	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1702	1	2C7WDGBG7GR39650		16,069	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1703	1	2C7WDGBG4GR39650		15,372	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1704	1	2C7WDGBG1GR39650		14,710	\$52,000.00	4	No
RevenueVehicles	MV - Mini-van	1705	1	2C7WDGBG7GR39651		15,944	\$52,000.00	4	No

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	Vehicle Mileage	Replacement Cost/Value	Useful Life Benchmark (Yrs)	Past Useful Life Benchmark
RevenueVehicles	MV - Mini-van	1706	1	2C7WDGBG6GR39651 9		10,688	\$52,000.00	4	No
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1013	1	1F66F5DY7B0A04333	7	89,206	\$210,000.00	10	No
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1707	1	1F66F5DY0H0A10659		5,443	\$210,000.00	10	No

Appendix B: Asset Condition Data

B2: Equipment Assets

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	Vehicle Mileage	Replacement Cost/Value	Useful Life Benchmark (Yrs)	Past Useful Life Benchmark
Equipment	Non Revenue/Service Automobile	506	1 91	JHMF3F27AS0008	8	66,107	\$30,000.00	5	Yes
Equipment	Non Revenue/Service Automobile	513	1 1	1FADP3E24EL25595	3	54,859	\$15,000.00	5	No
Equipment	Non Revenue/Service Automobile	514	1 0	1FADP3E22EL25595	3	71,469	\$15,000.00	5	No
Equipment	Non Revenue/Service Automobile	515	1 2	1FADP3E26EL25595	3	69,452	\$15,000.00	5	No
Equipment	Non Revenue/Service Automobile	516	1 019	2C7WDGBG4ER427	3	43,433	\$52,000.00	5	No
Equipment	Non Revenue/Service Automobile	517	1 170	2C7WDGBG0ER432	3	16,193	\$52,000.00	5	No
Equipment	Non Revenue/Service Automobile	518	1 66	1FMCU0F79FUA821	2	54,838	\$20,000.00	5	No
Equipment	Non Revenue/Service Automobile	519	1 67	1FMCU07F0FUA821	2	89,114	\$20,000.00	5	No
Equipment	Non Revenue/Service Automobile	520	1 68	1FMCU0F72FUA821	2	17,695	\$20,000.00	5	No
Equipment	Non Revenue/Service Automobile	521	1 417	1FMCU0F71HUB03		15,500	\$20,000.00	5	No
Equipment	Non Revenue/Service Automobile	1201	1 97	2D4RN4DG7BR7949	5	163,100	\$52,000.00	5	Yes
Equipment	Non Revenue/Service Automobile	1203	1 60	2C4RDGBG6CR1806	5	130,864	\$52,000.00	5	Yes
Equipment	Trucks and other Rubber Tire Vehicles	504	1 94	3B6KC26Z92M2507	15	171,696	\$32,000.00	5	Yes
Equipment	Trucks and other Rubber Tire Vehicles	511	1 1	1FT7X2A60EEB2777	3	38,658	\$25,000.00	5	No
Equipment	Trucks and other Rubber Tire Vehicles	512	1 50	1FD7X2A62EEB278	3	22,323	\$32,000.00	5	No
Equipment	Trucks and other Rubber Tire Vehicles	522	1 46	1FD7X2A66GED422	1	12,593	\$32,000.00	5	No
Equipment	Trucks and other Rubber Tire Vehicles	523	1	67498	1	36	\$25,000.00	7	No

Appendix B: Asset Condition Data

B3: Facilities Assets

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	TERM Scale Condition	Replacement Cost/Value

Appendix C: Proposed Investment Project List

Project Year	Project Name	Asset/Asset Class	Cost	Priority
2018	40ft Transit Buses	RevenueVehicles	\$1,591,200.00	Medium
2018	Cutaway bus	RevenueVehicles	\$81,600.00	Medium
2019	40ft Transit Buses	RevenueVehicles	\$1,591,200.00	Medium
2019	MiniVans	RevenueVehicles	\$106,080.00	Medium
2020	35ft Transit Buses	RevenueVehicles	\$2,121,600.00	High
2020	Vintage trolley bus	RevenueVehicles	\$214,200.00	Medium
2020	Cutaway bus	RevenueVehicles	\$652,800.00	Medium
2021	Cutaway bus	RevenueVehicles	\$244,800.00	Medium
2021	MiniBus	RevenueVehicles	\$816,000.00	High
2021	MiniVans	RevenueVehicles	\$371,280.00	Medium
2022	40ft Transit Buses	RevenueVehicles	\$530,400.00	Medium
2022	Cutaway bus	RevenueVehicles	\$81,600.00	Medium
2022	MiniVans	RevenueVehicles	\$318,240.00	Medium

Appendix D: Fleet Replacement Module Output

Total in Current Year \$		\$1,640,000.00		\$1,664,000.00		\$2,930,000.00		\$1,404,000.00		\$912,000.00	
Total in Year of Expenditure \$		\$1,672,800.00		\$1,697,280.00		\$2,988,600.00		\$1,432,080.00		\$930,240.00	
		2018		2019		2020		2021		2022	
Fleet Type (Year/Make/Model)	Number	Cost in 2017 \$	Number	Cost in 2017 \$	Number	Cost in 2017 \$	Number	Cost in 2017 \$	Number	Cost in 2017 \$	Number
2003 GILLIG PHANTOM	3	\$1,560,000.00	3	\$1,560,000.00	2	\$1,040,000.00					
2008 GILLIG PHANTOM											
2000 MCI 102-DL3											
2010 DOUBLE K VILLAGER					1	\$210,000.00					
2017 DOUBLE K VILLAGER											
2010 THOR EZ RIDER					2	\$1,040,000.00					
2011 EL DORADO BRT									1	\$520,000.00	
2013 GILLIG LOW FLOOR											
2015 GILLIG LOW FLOOR											
2015 FORD STARCRAFT E450							3	\$240,000.00			
2009 CHEVY EL DORADO											
2012 FORD SD EL DORADO											
2013 INTERNATIONAL EL DORADO											
2013 DODGE BRAUN ENTRAVAN					2	\$104,000.00					
2012 FORD STARCRAFT E450	1	\$80,000.00									
2014 FORD STARCRAFT E450							8	\$640,000.00			
2016 FORD STARCRAFT E450											
2016 DODGE BRAUN									7	\$364,000.00	1
2017 DODGE BRAUN											
									6	\$312,000.00	