

REGIONAL TRANSIT ISSUE PAPER

Agenda Item No.	Board Meeting Date	Open/Closed Session	Information/Action Item	Issue Date
23	06/12/17	Open	Action	06/06/17

Subject: Adopt Fiscal Year 2018 Operating, Debt Service, Capital Budget and Authorized Classifications, Positions and Salary Grades

ISSUE

Whether to adopt the FY 2018 Operating and Capital Budgets and authorize the filing of the Transportation Development Act (TDA) claim based on the adopted FY 2018 Budget.

RECOMMENDED ACTION

- A. Accept Public Comment; and
- B. Adopt Resolution No. 17-06-____, Approving the Sacramento Regional Transit District FY 2018 Operating, Debt Service, Capital Budgets and Vote Allocation; and
- C. Adopt Resolution No.17-06-____, Authorizing the Filing of the FY 2018 Transportation Development Act (TDA) Claim Based on the Adopted Budget; and
- D. Adopt Resolution No. 17-06-____, Amending Exhibit A of Resolution No. 17-04-0047, and Approving New Job Descriptions and SacRT's Authorized Classifications, Positions and Salary Grades.

FISCAL IMPACT

Budgeted:	No	This FY:	N/A
Budget Source:	Operating/Capital	Next FY:	\$456.4 million
Funding Source:	Various	Annualized:	N/A
Cost Cntr/GL Acct(s) or Capital Project #:	Various	Total Amount:	\$456.4 million
Total Budget:	Operating	\$161.3 million	
	Capital	\$295.1 million	

DISCUSSION

This report presents SacRT's Abridged FY 2018 Operating and Capital Budgets (Exhibit A) for adoption. The proposed budget is based on reasonable assumptions and a plan for a balanced budget in FY 2018.

The Preliminary Abridged FY 2018 Operating and Capital Budget was released for a sixty-day review on April 10, 2017. The Public Hearing was opened on May 8, 2017, at which time the public was offered an opportunity to provide feedback regarding the Preliminary Abridged FY

Approved:

Presented:

Final 06/06/17

General Manager/CEO

Director, Office of Management and Budget

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2018 Budget. In addition, SacRT has scheduled additional forums for the public to provide feedback. Feedback from the public is included as Attachment 1.

Since the FY18 Preliminary Budget was presented to the Board, staff has continued to refine the expense plan and monitor revenue projections. Based on this, the revenue and expense plans have changed slightly, and as a result, staff proposes the following changes in the Operating Budget for the upcoming year:

**FY 2018 Operating Budget Revisions
Table 1**

Categories	FY 2017 Adopted Budget	FY 2018 Preliminary Budget	FY 2018 Proposed Budget	FY 2018 \$ Changes	FY 2018 % Changes	FY 2018 to FY 2017 \$ Changes	FY 2018 to FY 2017 % Changes
Operating Revenues							
Fare Revenue	\$ 31,165,419	\$ 31,609,897	\$ 30,571,633	\$ (1,038,264)	-3.3%	\$ (593,786)	-1.9%
Contracted Services	6,092,006	5,605,112	5,605,112	-	0.0%	\$ (486,894)	-8.0%
Other	4,840,000	3,578,000	3,578,000	-	0.0%	\$ (1,262,000)	-26.1%
State & Local	86,109,455	87,540,564	90,515,934	2,975,370	3.4%	\$ 4,406,479	5.1%
Federal	34,271,670	32,570,213	31,033,107	(1,537,106)	-4.7%	\$ (3,238,563)	-9.4%
Total Operating Revenue	\$ 162,478,550	\$ 160,903,786	\$ 161,303,786	\$ 400,000	0.2%	\$ (1,174,764)	-0.7%
Operating Expenses							
Salaries & Benefits	\$ 107,805,243	\$ 109,755,925	\$ 109,879,300	\$ 123,375	0.1%	\$ 2,074,057	1.9%
Professional Services	28,272,517	23,031,114	23,498,614	467,500	2.0%	\$ (4,773,903)	-16.9%
Materials & Supplies	8,449,973	9,031,225	9,041,225	10,000	0.1%	\$ 591,252	7.0%
Utilities	6,711,124	6,761,700	6,761,700	-	0.0%	\$ 50,576	0.8%
Casualty & Liability	9,057,035	8,059,476	7,838,601	(220,875)	-2.7%	\$ (1,218,434)	-13.5%
Other	2,182,658	4,264,346	4,284,346	20,000	0.5%	\$ 2,101,688	96.3%
Total Operating Expenses	\$ 162,478,550	\$ 160,903,786	\$ 161,303,786	\$ 400,000	0.2%	\$ (1,174,764)	-0.7%
Balance	\$ -	\$ -	\$ -	\$ -			

Operating Budget

The following is a summary of the adjustments made to the FY18 Budget since April 10, 2017. The previously provided April 10, 2017 Budget Issue Paper detailed the changes to the budget from FY17:

Revenues

A net increase of \$400,000 in projected total revenues is due to the following:

- *Fare Revenue* decreased by \$1,038,264 due to cash and prepaid media trend, the introduction of 90 minute transfers for connect card users, free ride days, and veterans' discounts. With this change, this category experienced a decrease of \$593,786 or 1.9%

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from the FY17 budget.

- *State & Local* revenues increased by \$2,975,370 via \$3,000,000 in anticipated revenues from the recently passed State transportation bill, a slight reduction of \$47,000 of State Transit Assistance funds, and a slight increase of \$22,370 of projected Measure A funds. With this change, this category experienced an increase of \$4,406,479 or 5.1% from the FY17 budget.
- *Federal* revenues decreased by \$1,537,106 to account for potential reductions to federal formula funds. With this change, this category experienced a decrease of \$3,238,563 or 9.4% from the FY17 budget.

Expenses

A net increase of \$400,000 in projected total expenses is due to the following:

- *Salaries & Benefits* costs increased by \$123,375. This was primarily due to refinements to salary and benefit calculations. With this change, this category experienced an increase of \$2,074,057 or 1.9% from the FY17 budget. Total full time equivalents (FTEs) increased by 0.75 due to additional funding for a Transportation Supervisor in the Security & Safety Division.
- *Professional Services* costs increased by \$467,500 due to the continued negotiations with our vendors, professional services adjustments, and additional real estate services (which were offset by reductions in real estate salary and benefits). With this change, this category experienced a decrease of \$4,773,903 or 16.9% from the FY17 budget.
- *Materials & Supplies* costs increased by \$10,000 due to a slight increase in copier supplies. With this change, this category experienced an increase of \$591,252 or 7.0% from the FY17 budget.
- *Causality & Liability* costs decreased by \$220,875 due to reductions in insurance premiums. With this change, this category experienced a decrease of \$1,218,434 or 13.5% from the FY17 budget.
- *Other* costs increased by \$20,000 due to a slight increase in copier lease expense. With this change, these categories experienced an increase of \$2,101,688 or 96.3% from the FY17 budget.

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FY 2018 Capital Budget

**FY 2018 Capital Budget Revisions
Table 2**

Category	FY 2018 Preliminary Budget	FY 2018 Proposed Budget	Difference
Project Development	\$194,001,310	\$209,733,310	\$15,732,000
Fleet Program		11,097,205	11,097,205
Facilities Program		900,000	900,000
Equipment Program	973,064	973,064	-
Transit Security & Safety	565,206	1,289,045	723,839
Carryover Funding	-	71,138,743	71,138,743
Total	\$195,539,580	\$ 295,131,367	\$99,591,787

Adjustments

The FY 2018 Preliminary Abridged Capital Budget presented to the Board on April 10 totaled \$195,539,580. The updated FY 2018 Proposed Capital Budget is now \$295,131,367. The major reason for the difference is due to the inclusion of the estimated amount of unspent funds to be carried over from FY 2017 to FY 2018, estimated at \$71,138,743. Unlike the Operating Budget, the Capital Budget consists of projects that often take multiple years to complete. Funds approved for a project that are not spent in the previous fiscal year are typically carried over to the following fiscal year. These figures were not able to be included in the Preliminary Abridged Capital Budget due to the uncertainty of carryover amounts at that point in the fiscal year. The actual amounts to be carried over from FY17 will be reported to the Board as part of the five-year Capital Improvement Plan update.

The remaining increase of \$28,453,044 from the FY 2018 Preliminary Abridged Capital Budget consists of new funding additions summarized as follows:

- \$5,100,000 of State Traffic Congestion Relief Program (TCRP) funds for the Northeast Corridor Enhancement project (#230) to procure fare vending machines and passenger information and security features.
- \$7,900,000 of State TCRP funds and \$300,000 of 2012 revenue bond funds for the South Sacramento Phase 2 Light Rail project (#410) to procure fare vending machines and passenger information and security features, and relocate a traction power substation and relay case.

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- \$500,000 of Federal Congestion Mitigation and Air Quality (CMAQ) funds and \$300,000 of Local Sacramento Housing and Redevelopment (SHRA) funds for the Light Rail Station at Dos Rios project (#R055) to complete final design of the station.
- \$500,000 of Federal CMAQ funds and \$500,000 of Local Funds including \$250,000 of Developer Fees and \$250,000 City of Rancho Cordova funds for the Light Rail Station at Horn project (#R135) to complete engineering and design of the station.
- \$632,000 of State Proposition 1A funds for the Green Line SVS Loop project (#R327) to fund final design of the Loop.
- \$7,297,205 of State Proposition 1B - Public Transportation Modernization, Improvement, and Service Enhancement Account (PTMISEA) Program funds for the Paratransit Vehicle Replacement – CNG project (#P009) to replace vehicles at the end of their useful lives.
- \$3,800,000 of State funds from the recently enacted transportation bill to help initiate the replacement program for the 30-year old Siemens light rail vehicles.
- \$300,000 of State funds from the recently enacted transportation bill to replace \$300,000 of 2012 revenue bond funds on the light rail station enhancement project for a net fiscal impact of zero.
- \$900,000 of State funds from the recently enacted transportation bill to replace the elevator at the Watt / I-80 light rail station.
- \$870,000 of Federal Section 5312 Safety Research and Demonstration funds for the Enhancement Employee Protection Warning System project (#R344) to greatly reduce or eliminate unintentional train intrusion into a light rail work zone.
- Reduction of \$565,206 of State Proposition 1B Transit Security funds for the Transit Security project (#T000).
- \$419,045 of State Proposition 1B Transit Security funds for the Security, Systems, and Communications Infrastructure Upgrade project (#T054) to support security infrastructure on RT's transit system.

Please keep in mind that a large portion of the amounts included in the Capital Budget are reliant on funding being made available from Federal, State, and other outside agencies. Additional details regarding these projects are included in Exhibit A.

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New Job Descriptions and SacRT’s Authorized Classifications, Positions and Salary Grades.

This proposed action will result in the creation of 2 new job descriptions and a deletion of an existing position. Fiscal impact associated with these changes is reflected in SacRT’s adopted FY 2018 Operating Budget.

General Manager’s Office

Reporting to the General Manager/CEO, the Special Assistant, Office of the General Manager/CEO (Special Assistant) will be responsible for assisting the General Manager/CEO with highly complex and cross-divisional specialized duties, tasks, and responsibilities related to the strategic operations of SacRT associated with specific projects, programs, and initiatives. The Special Assistant will have responsibility for developing and communicating divisional and/or departmental policy for high level projects having broad impact across multiple areas; in this capacity, the incumbent will make policy recommendations that will have District-wide impact in a wide variety of areas such as program enhancements, strategies, and continuous improvement efforts related to the functions of the District necessary to assure accomplishment of SacRT’s vision, mission, Strategic Plan, and Strategic Initiatives.

The Job Evaluation Team (JET) determined that the compensable factors place this new job classification in Salary Grade 111 within the Management and Confidential Employee Group. There is no fiscal impact associated with this change, as all costs are included in the FY 2018 budget. Changes to the total number of authorized positions are reflected in Exhibit A.

Finance Department

Due to recent changes in the administrative reporting and analytical needs of the Finance Department, staff performed a review of the current support structure within the department. Results of the review identified the need to create the new classification of Program Analyst to address this need. This position will provide professional analytical and technical level program/project work in the administration, coordination and management of SacRT’s Finance Department. This position will also allow for greater automation of SacRT’s existing banking partner through a web based portal, improved tracking of costs, and greater internal controls accomplished by focusing additional analytics. Duties for SacRT’s credit card program will also be shifted from the Procurement department to the Program Analyst, allowing the department to redirect its attention to compliance with procurement rules and regulations.

The Job Evaluation Team (JET) determined that the compensable factors place this new job classification in Salary Grade 107 within the Management and Confidential Employee Group. There is no fiscal impact associated with this change as this position will replace a funded Senior Administrative Assistant position. Changes to the total number of authorized positions are reflected in Exhibit A attached to the Resolution.

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Authorized Classifications, Positions and Salary Grades

Changes to position control described above are reflected in the Authorized Classifications, Positions and Salary Grades list (Authorized Positions List), attached to the Resolution as Exhibit A.

New Job Descriptions

The job descriptions listed below are attached to the Resolution as Exhibit B.

<u>Previous Job Title</u>	<u>Disposition</u>	<u>New Job Title</u>
N/A	New	Special Assistant, Office of the General Manager/CEO
N/A	New	Program Analyst

Recommended Board Action

Staff recommends that the Board closes the Public Hearing and adopts the FY 2018 Operating and Capital Budgets, vote allocation, and approving new job descriptions and SacRT's authorized classifications, positions and salary grades.

Consistent with past practice, staff recommends that the Board delegate authority to the General Manager/CEO to file the FY 2018 Transportation Development Act (TDA) claim for an amount not to exceed the District's apportionment sufficient to claim all available current and prior year funds available for SacRT.

Note: The District's TDA claim includes the annual allocation amount of \$1,323,729 to the Sacramento Area Council of Governments (SACOG) for transportation planning purposes. These funds are not included in the District's FY 2018 Operating Budget, as they are paid directly to SACOG.

Attachment 1



May 8, 2017

Regional Transit Board of Directors
Henry Li, General Manager/CEO
Brent Bernegger, Director of Finance
1400 29th Street
Sacramento, CA 95816

Re: RT's FY 2018 Budget (Board Item No. 7)

Dear Board of Directors, Mr. Li, and Mr. Bernegger:

The Sacramento Transit Riders Union (Sac TRU) is writing to request a line-item budget for the proposed FY 2018 Regional Transit Operating and Capital Budget, in addition to the Preliminary Abridged FY 2018 Budget already provided. We believe the current budget documents provided to the public and the Board are insufficiently detailed and do not fulfill basic public disclosure requirements.

We would like to thank RT for attending a budget training workshop at the Organize Sacramento office on March 23, 2017. Our members appreciated learning more about how the complicated Regional Transit budget process works. We encourage RT staff to host their own events on the FY 2018 Budget and provide more outreach and community engagement with riders about the current budget proposal.

The Preliminary FY 2018 Operating and Capital Budget was released for public review on April 10, 2017. The public hearing notice was published in the Sacramento Bee and was advertised on the RT website. While this process is to give the public an opportunity to express their opinions, currently RT staff has received no emails, calls or letters asking questions or providing comment on the budget. We believe this is an indication that more meaningful community outreach is necessary.

This issue was brought up last year during the budget process. It was suggested by members of the public in 2016 that RT consider in the future providing community workshops on the budget, similar to the ones provided by Sacramento City Council. This year Mayor Steinberg and City Council members held workshops in each of their districts addressing the budget. We request that RT Staff organize similar trainings in the region covered by RT to provide more information on the FY 2018 Budget. We request that a line-item budget be made available to the public.

We look forward to working with you as the final report will be presented to the RT Board of Directors for approval on June 12, 2017. Please include this letter in the public record.

Sincerely,

Sac TRU

If you could improve Sacramento R.T.D. Services, what "simple" solutions would you implement, first?

- 1: Improve Weekday frequency to every ten minutes, and extend route into McClellan Business Park.
 - 6: Add hourly Weekend/Holiday service to serve both the Sacramento Zoo and Downtown Sacramento.
 - 11: Add hourly Sunday/Holiday service. *Improve Weekday service frequency to every 30 minutes.*
 - 13: Add hourly Weekend/Holiday service.
 - 15: Begin Weekend/Holiday service hours as weekday hours are. Extend night trips to Watt/I-80 Station.
 - 19: Fine tune Weekend/Holiday route and schedule to improve on-time performance.
 - 21: All trips will originate and/or terminate at the Louis/Orlando Transfer Point rather than Sunrise Mall.
 - 22: Eliminate Route. Replace route with hourly all-day service on Route 29.
 - 23: Improve Weekday service to every fifteen minutes & Sunday/Holiday Service to every thirty minutes.
 - 24: Operate over the American River Canyon to Folsom via Madison Eastbound, Greenback Westbound.
 - 25: Add hourly Sunday/Holiday Service.
 - 26: Remove loop in the McClellan Business Park and merge route at Watt/I-80 with Route 93.
 - 28: Add hourly Weekend/Holiday Service & improve Weekday service to once every thirty minutes.
 - 29: Replace eliminated Route 22 – both ways - with hourly all day service along current route alignment.
 - 30: Improve weekday service to every ten minutes & Weekend/Holiday service at every thirty minutes.
 - 38: Improve Weekday & Weekend/Holiday Service to once every thirty minutes.
 - 51: Improve Weekday frequency to 10 minutes, Saturday's every 20 minutes, Sunday every 30 minutes.
 - 51: Realign route in Downtown Sacramento to make Sacramento Valley Station the Downtown Terminal.
 - 54/67: Add hourly Weekend/Holiday service. Change from 54 to 67 and vice-versa at Florin Station.
 - 55/68: Make one route from Cosumnes River College to Arden Fair Mall Transit Center.
 - 56: Improve Sunday/Holiday service to once every thirty minutes, matching current Saturday frequency.
 - 61: Improve Weekday frequency to every thirty minutes and add hourly Weekend/Holiday service.
 - 62: Add hourly Sunday/Holiday service.
 - 65: Add hourly Weekend/Holiday service.
 - 67: Realign Florin Road segment of route from Florin Town Centre to serve the Florin Blue Line Station.
 - 68/55: Make one route from Arden Fair Mall Transit Center to Cosumnes River College.
 - 80: Improve weekday frequency to once every thirty minutes.
 - 81: Eliminate Route and replace with route extensions to Route 82 and Route 87.
 - 82: Extend route via 65th Street and Florin Road to Florin Road & Riverside Boulevard.
 - 84: Improve weekday frequency to once every thirty minutes and add hourly Sunday/Holiday Service.
 - 87: Extend route via 65th Street and Florin Road to Florin Road & Riverside Boulevard.
 - 86: Align route similar to Route 11 with service on Richards Boulevard and North Seventh Street.
 - 88: Align route similar to Route 11 with service on Richards Boulevard and North Seventh Street.
 - 93: Merge with Route 26 at the Watt/I-80 Station and provide 15-minute weekday peak hour frequency.
 - 103: Eliminate Route. See Route 93 for improved weekday peak hour frequency - every fifteen minutes.
 - 109: Improve frequency to 30 minutes all day with endpoints at both Hazel Station "and" Sierra College.
 - 507: Add Sunday/Holiday hours to the Gold Line, matching existing weekday and Saturday night hours.
 - 533: Add Sunday/Holiday hours to the Blue Line, matching existing weekday and Saturday night hours.
- All Bus Lines: Add hours and frequency, all days, into the night matching Blue & Gold Line service hours.



**SacRT FY2018 Budget Presentation
Samuel Pannell Meadowview Community Center
Conference Room A+B
2450 Meadowview Road, Sacramento
Thursday, May 25, 2017 (10:00 am to 12:30 pm)**

Public Comments (Responses in *italics*)

Meeting began at 10:31 AM

Three individuals from the public were in attendance.

Feedback:

Russell Rawlings:

Are there other projects we can use for the Prop 1A money? This will be the subject of an upcoming issue paper.

It's a hard sell to the public to build reserve at the same time as spending money on Street Car. Building an operating reserve and spending money on a project are two different unrelated concepts. It is entirely possible to build a reserve so long as we continue to operate efficiently and save money.

How do other transit agencies compare to SacRT in their reliance of a credit line for financial support? Our research has found that most transit agencies have sufficient reserves to negate the need for a line of credit.

Big concern -- How to help public understand SacRT Budget? We continue to have public presentations on the budget. We are also exploring technological solutions regarding fiscal transparency.

What is SECAT? Is that where the 51x money coming from? SECAT is the Sacramento Emergency Clean Air & Transportation Grant Program. The SECAT Program is a partnership between the Sacramento Metropolitan Air Quality Management District (SMAQMD) and the Sacramento Area Council of Governments (SACOG). Currently, the Program provides grant funds to replace on-road heavy-duty diesel vehicles that have 2006 and older model year engines with diesel particulate filter (DPF) retrofits or other limited exempt vehicles with cleaner emission vehicles. The goal of the SECAT Program is to reduce the harmful surplus emissions from on-road heavy-duty vehicles operating in the Sacramento Federal Nonattainment Area (SFNA). The 51x shuttle may be eligible for SECAT reimbursement.

Meeting adjourned at 11:26 am.



SacRT FY2018 Budget Presentation
RT Auditorium
Wednesday, May 31, 2017 (1:00 pm to 2:30 pm)

Public Comments (Responses in *italics*)

Meeting began at 1:08 PM.

Four individuals of the public were in attendance.

Feedback:

Tamie Dramer:

- Is the LTF included in the recently passed Senate Bill? *We are still waiting to receive guidance from Caltrans regarding the recently passed Transportation act. We will be attending meetings on this in the near future. We anticipate it being included as part of STA not LTF.*
- What is Salary PSC? *This is to pay for employees on personnel service contracts in our security operations center where cameras are monitored on a 24 hour basis.*
- Do you have a cost breakdown between rank and file workers / managerial level administrative? *While our accounting system has cost breakdowns by Divisions and Departments, it does not provide breakdowns below the general ledger level. There will some degree of subjectivity involved in determining which positions to place in the worker vs. managerial categories as many of our employees have overlapping duties. A detailed review of all job descriptions will be required for such an effort.*
- Since streetcar hasn't been approved by voters, where will funds be allocated? *We anticipate that there will be an agenda item for the Board's consideration in the near future.*

Sarah Kerber:

- Is there a list of those specific consultants available within the Outside Service line item? *The names of the consultants are not something that is directly related to the budget and in many cases the names are not known to SACRT when the budget is developed because contracts have yet to be awarded.*
- Do you have estimate on connect card program when it becomes profitable. *The connect card program is not meant to make a profit; it is meant to enhance the customer experience by making purchasing fare and transferring between vehicles more convenient.*
- What can SACRT expect to see in revenue from connect card. *We are already receiving revenue from the connect card.*
- What's the next year's projection for connect card fare revenue? *We anticipate a 25% adoption rate which translates into approximately \$5 Million of revenue, which is four to five times the anticipated costs.*
- When was the last time you were at best practice level (reserves/line of credit)? *The Board adopted a comprehensive reserve policy which included the operating reserve in 2015. We started tracking reserve balance in 2012. Best practice is from the GFOA calls for having 60 days of operating reserve. Since 2012, we have not achieved this goal.*
- When are you projecting to get back to best practice level? *We are working on developing a plan to build up SACRT's reserves, which could take 5 year or more depending on future funding.*
- Does SACRT have slides showing expenditures compare actual expenditures? Is the extra money in 2017 due to increased fares? *We provide the SACRT Board with monthly budget to actual comparisons. Through April, fare revenue is within 1 percent of budget; total revenues, including fare revenue, is \$880,000 below budget due to advertising revenue and reduced Federal revenues; expenses are \$2,385,000 below budget due to business optimizations and salary and benefit savings which is the largest expense component.*

Jeffrey Tardegauls:

- How is the breakdown for security services broken down in this budget? *Sacramento Sheriff: \$1,427,636, 1 sergeant, and 4.5 deputies; Sacramento Police Department \$3,605,319, 1 captain, 1 lieutenant, 2 sergeants, and 16 officers; Folsom Police Department \$103,813; Paladin Security \$150,000; Navigator – Sacramento Steps Forward \$56,580.*
- Are you expecting a 3% setting as far as fees for Connect Card? *There will be no fee to use the Connect Card. SACRT will continue to absorb the cost of accepting credit card for purchase of fare. A fee of 3% is considered reasonable since banking fees are generally between 2.5% to 5%.*
- What is projection for Connect Card? *See answer to Sarah Kerber.*
- Are streetcars going to be WiFi compatible? *This will depend on budget availability and decisions by the project owners.*
- Is 1B money restricted Funds? Is this a grant program? *The Highway Safety, Traffic Reduction, Air Quality and Port Security Bond Act of 2006, approved by the voters as Proposition 1B at the November 7, 2006, general election, authorizes the issuance of \$19,925,000,000 in general obligation bonds for specified purposes, including grants for transit system safety, security and disaster response projects, for a period of ten years. FY 2017 is the final year of Proposition 1B grant funding.*
- Was Meadowview better attended than today? *No, only three persons were in attendance at Meadowview.*
- In the expense column, bus shuttle/bridge situation, elevator situation – where is that in the line item? So, we're using that in dealing with the elevator situation? *Costs associated with the bus shuttle/bridge are located in the line items within the Transit Services Division.*
- Cost in running different rail lines (Blue vs Green vs Gold), is this expenditure tracked and available? *Costs for the rail lines in total are tracked in the Light Rail Department.*
- I80 Elevator to be included in budget? *Funds for the replacement elevator at the Watt/I-80 station will be included in the proposed capital budget.*

Steven Bourasa:

- Streetcar is owned by two cities -- why is Prop A giving their funds to Streetcar? *This will be the subject of an upcoming issue paper.*
- Did RT pay for WiFi? *Wifi is not planned for at this time.*
- Any speculation on naming rights on K Street station? *Nothing at this time.*

Meeting adjourned at 2:00 pm.



SacRT FY2018 Budget Presentation
RT Auditorium
Tuesday, June 6, 2017 (6:00 pm to 7:30 pm)

Public Comments (Responses in *italics*)

Meeting began at 6:05PM

Nine members from the public were in attendance.

Feedback:

Public Member #1:

- When do you think you will be able to achieve best practice levels for the operating reserve. *This is highly dependent on future revenue sources and funding our deferred maintenance and replacements. We are in the process of working on a plan to achieve this.*
- How does operating budget differ from capital improvement budget? *Operating budget appropriations fund operations for one year at a time. At the end of the fiscal year, operating budget appropriations expire. The capital improvement budget funds multi-year capital projects where appropriations that are not fully spent at the end of a fiscal year are carried-forward to the next fiscal year. Capital assets are assets with an individual cost of more than \$5,000 with a useful life of over one year. For example, operating expenditures would fund the salary of the bus operator, fuel, and maintenance for a bus while capital expenditures would fund the purchase of a bus.*
- Is there money available to match the \$25M of Proposition 1A funds? *That would be project dependent.*
- There are other priority projects, why fund Streetcar? *There will be an issue paper regarding this on the June 12, 2017 Board meeting agenda.*
- Is there a survey on Streetcar development? *There is a publically available website with information pertaining to the streetcar. <http://www.riverfrontstreetcar.com/>*

Public Member #2:

- Regarding the operating reserves on the slide in the presentation, have you presented this to the Board and have they requested a timeline? *We presented this slide to the Board at the April 10, 2017 Board meeting. We are in the process of working on a plan for operating reserves.*

Public Member #3:

- Will we get to see the current year year-end budget? *We will have a better understanding of our position for the current fiscal year once the year closes and we are able to reconcile our books.*
- Provide data on the new accounting software that SacRT is looking into. *We are in the early stages of exploring a potential replacement to our ERP software.*
- Compare and contrast cost of repairing elevator. *We are currently operating a shuttle to provide service to the Watt / I-80 station. We are proposing funding the replacement of this elevator in the FY18 capital budget.*

Public Member #4:

- When will the Budget be adopted? *The hearing to adopt the budget is scheduled for June 12, 2017.*
- Questions on line items: Please explain the items for laundry and the awards ceremony? If not spent, where does it go? *The line item for laundry is for the cleaning of employee uniforms. The line item for awards ceremony is for employee awards to recognize employee achievements which helps build morale to achieve a more efficient and productive workplace. Unspent funds, in aggregate, go back into fund balance at the end of the year*
- Prop 1A – Why is SacRT pursuing the Streetcar? How can we give feedback? \$25 million would go a long way towards initiatives. *The Streetcar project is owned by other entities. The Streetcar Policy Steering Committee and Streetcar Project Management Team has requested that SacRT commit \$25 Million of Proposition 1A funds to the Downtown/Riverfront Streetcar project in order to provide matching funding to apply for Federal New Starts funds. SacRT is also offering their technical expertise regarding this project and is handling the coordination of the construction. Feedback can be given during the budget hearings and during Board meetings. There will be an issue paper regarding this on the June 12, 2017 Board meeting agenda.*

Public Member #5:

- Where does the repair for the elevator at Watt/I-80 and Bus bridges show up in the budget? *Costs associated with the bus shuttle/bridge are located in the line items within the Transit Services Division. While the cost is not tracked in the budget separately, it impacts SacRT's overall service reliability as buses have to be diverted from regular routes to operate the shuttle. The costs to replace the elevator at Watt/I-80 will be programmed in the capital budget.*

Public Member #6:

- Please explain the radio communications systems upgrade project. *This project is required to upgrade our communications equipment from analog to digital.*
- There's such a long list of capital needs that funds from the Transportation Bill will not be sufficient to cover it all. Agree on consensus, on legislative agenda in Sacramento SBAC. If lower vote threshold were in place, Measure B would have passed plus ten percent. *No response needed.*

Comment Cards (Sarah Kerber):

- How much is SacRT budgeting for the Watt Elevator repair project and the cost related to the bus shuttle. *While the cost is not tracked in the budget separately, it impacts SacRT's overall service reliability as buses have to be diverted from regular routes to operate the shuttle. The costs to replace the elevator at Watt/I-80 is estimated in the amount of \$900,000.*
- Would it be possible to get a year by year budget comparison? It would be helpful to see how the line items are changing over time. *This is something that we will be working on for our next year budget process.*
- Thank you for hosting these presentations. It would be nice to see more outreach to neighborhood associations, youth groups, and other organizations to increase community involvement and turnout. *SacRT would like to thank everyone for participating in these presentations. We will explore different outreach methods for our next year budget process.*

Meeting adjourned at 7:10 pm.

RESOLUTION NO. 17-06-_____

Adopted by the Board of Directors of the Sacramento Regional Transit District on this date:

June 12, 2017

**APPROVING THE SACRAMENTO REGIONAL TRANSIT DISTRICT
FY 2018 OPERATING, DEBT SERVICE, CAPITAL BUDGETS AND VOTE
ALLOCATION**

BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS OF THE SACRAMENTO REGIONAL TRANSIT DISTRICT AS FOLLOWS:

THAT, the Board hereby finds the level of service to be rendered in each city and county in which the Sacramento Regional Transit District will operate is commensurate with the level of tax and financial support to be derived from each such city and county.

THAT, the Sacramento Regional Transit District's FY 2018 Operating Budget of \$161.3 million and Capital Budget of \$289.5 million as set forth in attached Exhibit A is hereby approved.

THAT, the following voting distribution for FY 2018 as tabulated in the "Schedule of Weighted Voting Distribution" in the attached Exhibit A, is hereby approved.

Jurisdiction	Votes
County of Sacramento	41
City of Sacramento	37
City of Rancho Cordova	10
City of Citrus Heights	5
City of Elk Grove	4
City of Folsom	3
Total	100

ANDREW J. MORIN, Chair

A T T E S T:

HENRY LI, Secretary

By: _____
Cindy Brooks, Assistant Secretary



Sacramento Regional Transit District

Abridged Budget
Fiscal Year 2017-2018

June 12, 2017

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Board of Directors

Andrew J. Morin, Chair
City of Folsom

Patrick Kennedy, Vice Chair
County of Sacramento

Linda Budge
City of Rancho Cordova

Jeff Harris
City of Sacramento

Steve Hansen
City of Sacramento

Pat Hume
City of Elk Grove

Rick Jennings II
City of Sacramento

Steve Miller
City of Citrus Heights

Don Nottoli
County of Sacramento

Jay Schenirer
City of Sacramento

Phil Serna
County of Sacramento

Board of Directors Alternate

Steve Detrick
City of Elk Grove

Jeff Slowey
City of Citrus Heights

David Sander
City of Rancho Cordova

Executive Management Team

Henry Li
General Manager/CEO

Tim Spangler
Chief Counsel

Laura Ham
VP, Accountability and Performance

Mark Lonergan
VP, Transit Service/Chief Operating Officer

Suzanne Chan
VP, Administration

Neil Nance
VP, Strategic Planning and System Development

Brent Bernegger
VP, Finance/Chief Financial Officer

Devra Selenis
VP, Communications and Partnerships

Norm Leong
VP, Security and Safety

Olga Sanchez-Ochoa
Deputy Chief Counsel

Management and Budget Team

David Goldman
Director, Office Management and Budget

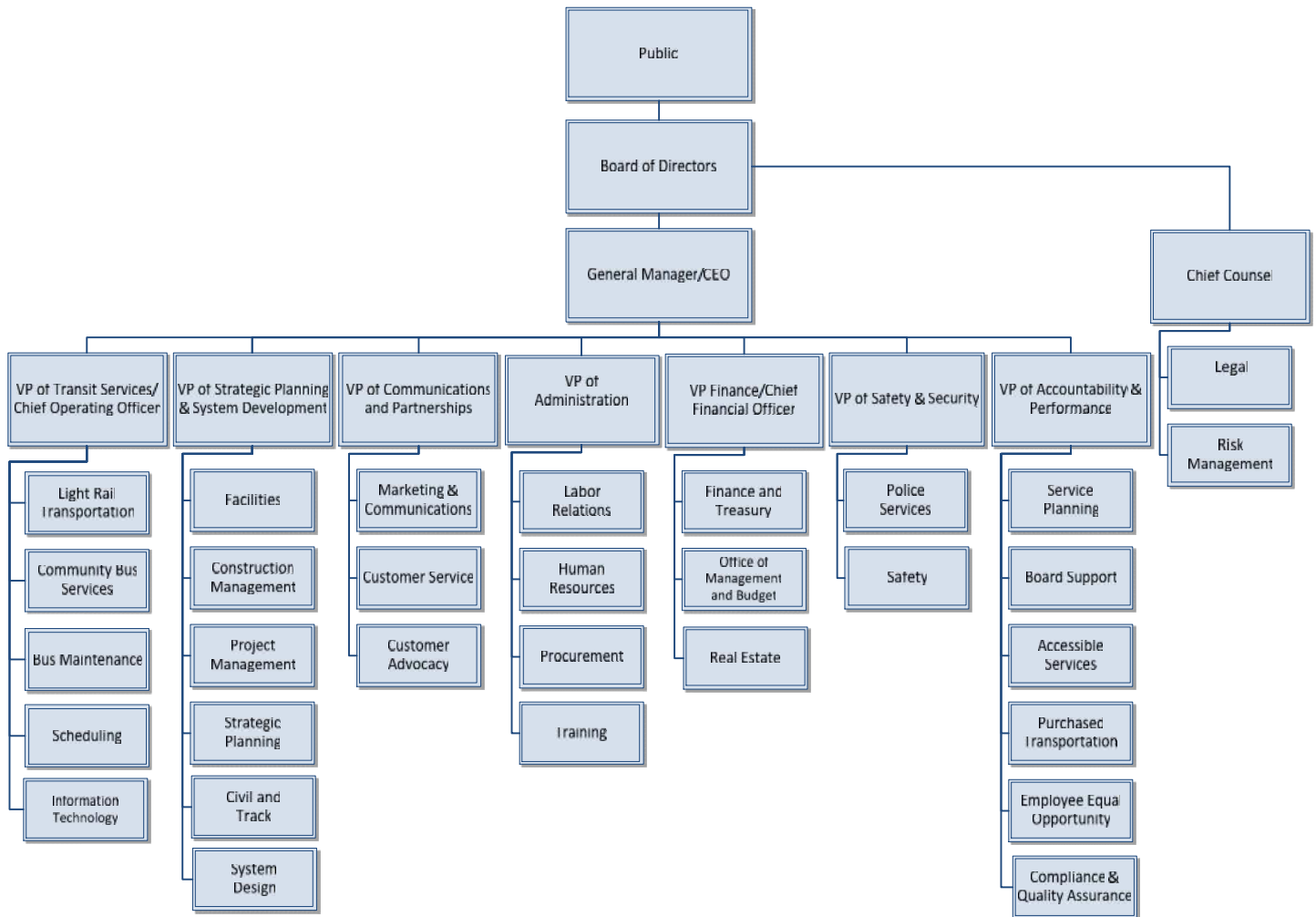
Maureen Ring
Grants Manager

Nadia Mokhov
Senior Financial Analyst

Joe Paglieroni
Senior Grants Analyst

Judy Wong
Senior Financial Analyst

Organizational Structure



District Overview
District Profile

Facts

Sacramento Regional Transit District	Constructs, operates, and maintains a comprehensive mass transportation system that serves 367 square miles in Sacramento County
--------------------------------------	--

Bus Service	
Power	Compressed Natural Gas, Diesel, Gasoline
Routes	69
Schedule	4:41 am to 11:38 pm daily
Stops	3,100+
Vehicles	211 - 40' CNG Buses 29 - Shuttle Vans
Annual Ridership	11,600,000

Light Rail Service	
Power	Electrical
Miles	42.9
Schedule	3:49 am to 12:59 am daily
Stops	53
Vehicles	87
Annual Ridership	12,400,000

Paratransit	
ADA Passenger Trips Provided	340,370
ADA Vehicle Revenue Miles	3,501,434
Vehicles	102

Passenger Amenities/ Customer Service	
Transfer Centers	32
Park & Ride	22
Annual Customer Service Calls	233,132
Customer Info Line	(916) 321-2877
Website	www.sacrt.com

History	
Apr 1, 1973	Began operations by acquiring the assets of Sacramento Transit Authority
1973	Completed new maintenance facility and purchased 103 new buses
1987	Opened the 18.3-mile light rail system, linking the northeastern Interstate 80 and southeastern Highway 50 corridors with Downtown Sacramento
Sep 1998	Completed the first light rail extension to Mather Field/Mills Station along the Gold Line corridor
Sep 2003	Opened the South Line, extending light rail to South Sacramento
Jun 2004	Extended light rail from Mather Field/Mills to Sunrise Boulevard
Oct 2005	Extended light rail from Sunrise Boulevard to Folsom, including four new stations
Dec 2006	Extended light rail from downtown Sacramento to Sacramento Amtrak station
Jun 2012	Opened the Green Line, connecting downtown Sacramento to the River District
September 2015	Extended light rail from Meadowview to Cosumnes River College

Strategic Plan

Adopted by the Board of Directors in January 2015, RT's Strategic Plan reaffirms RT's commitment to improve access in the Sacramento region by providing fiscally responsible transit service.

The Strategic Plan outlines the way RT will navigate challenges and explore opportunities as it seeks to connect people to resources with consideration and support of regional goals.

RT's Strategic Plan requires RT to shape activities to support identified Values and Goals, responsibly manage all agency actions and commitment of resources, and measure performance.

RT acts as the Region's focal point for transit research and development, strategic planning and system assessment, and transit education and safety training. RT's programs involve multiple modes of transportation.

This plan is RT's commitment to the people of the Sacramento Region. RT will accomplish this through regional leadership and by providing quality service in a respectful and sustainable manner. RT will continue to focus on customer service and provide safe, clean, and reliable transportation service. To prepare for future needs in the 21st Century, RT will build and continuously develop a highly skilled transportation workforce. RT will continue to challenge itself to meet the growing transportation needs of the Sacramento Region.

The RT Strategic Plan's Mission, Vision, Values, and Goals are listed on the following page. The plan is best seen as an evolving process, not a rigid or fixed document. This plan will change as the needs of the Region change and will reflect the transportation requirements of the Region. The updated RT Strategic Plan was recently adopted by the Board of Directors and is currently being implemented.

 Strategic Plan (continued)

Mission Statement

The purpose of the Sacramento Regional Transit District is to promote and improve access in the Sacramento region by providing safe, reliable, and fiscally responsible transit service that links people to resources and opportunities.

Vision Statement

The Sacramento Regional Transit District strives to connect people to resources and opportunities while stimulating livable communities and supporting economic development by providing an efficient and fiscally sustainable transit system that attracts and serves riders by offering an appealing transportation choice.

Values

- Quality Service & Innovation: RT is committed to providing safe, reliable, and cost efficient public transit services, and initiating innovative technologies to improve service effectiveness.
- Customer Service: RT places customers first by providing quality transit services and amenities with convenient and easily understood access at an affordable price.
- Respect & Professionalism: RT is committed to treating its customers and employees with dignity and respect, recognizing the importance and value of each individual.
- Fiscal Responsibility: RT is committed to the pursuit of efficient use of resources and of secure and stable funding sources.
- Integrity & Accountability: RT acknowledges its responsibility for actions and performance with an uncompromising commitment to truth, honesty and high ethical standards. RT is committed to compliance with regulatory requirements and industry standards and efforts to improve upon existing practices.
- Quality, Diverse & Positive Work Force: RT is committed to increasing employee effectiveness and satisfaction through effective communication, teamwork, appropriate resource availability, appreciation of varied abilities, and professional development opportunities.
- Regional Leadership & Coordination: RT is committed to work with area stakeholders to create a “world class” transit system that supports livable communities and related efforts.
- Health and Safety: RT is committed to achieve an optimal level of safety for our employees, customers and the general public by minimizing risk of injury and property loss and promoting a sound safety culture throughout the organization.
- Sustainability: RT is committed to environmentally sensitive services and practices.

Goals

Fundamental Goals

- Ensure Financial Stability
- Meet or Exceed Expectations for Safe & Quality Service in a Cost-Effective Manner
- Operate in an Ethical Manner
- Invest in the Attraction, Development & Retention of a Quality Workforce

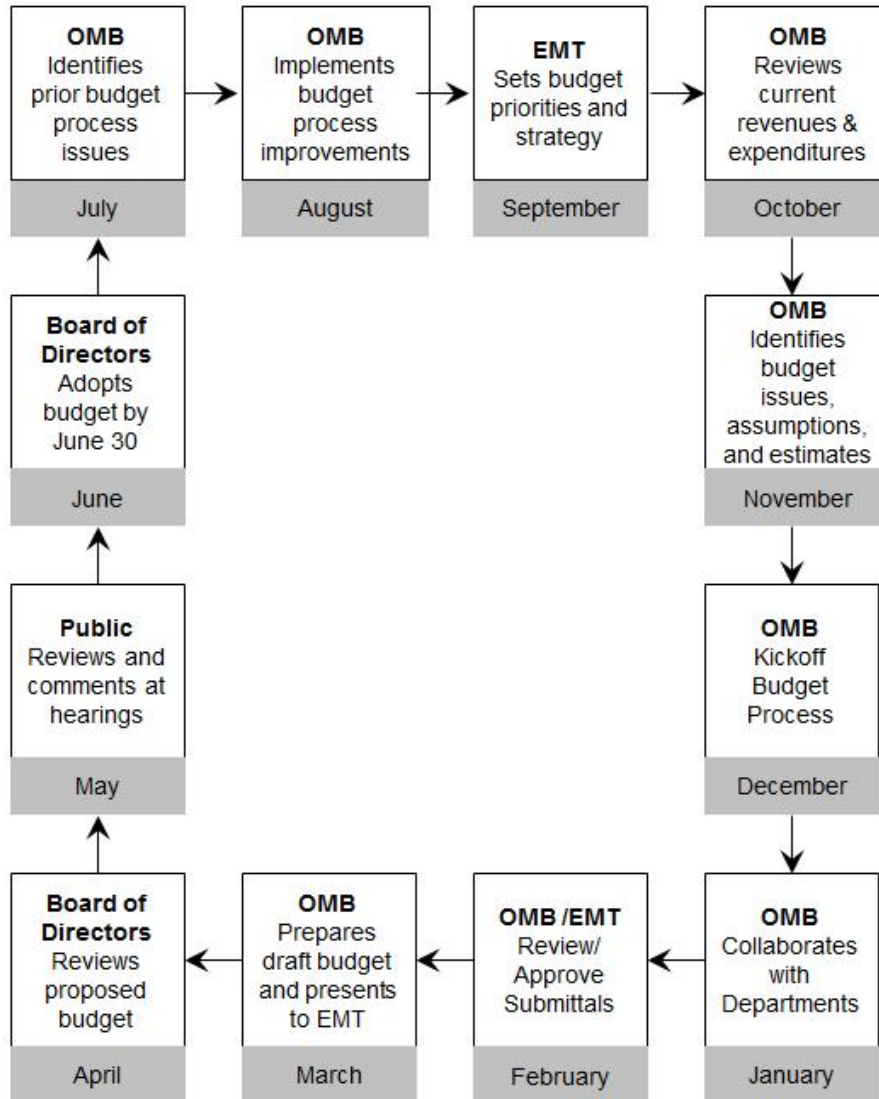
Strategic Plan (continued)

Growth Goals

- Improve Access Within and Between Communities in the Sacramento Region in a Cost-Effective Manner
- Increase Transit Market Share in the Sacramento Region
- Adjust to Legislative & Regulatory Changes and to Stakeholder & Community Initiatives, and Support Complementary Efforts

Budget Process

RT uses the annual budget to help measure and account for taxpayer dollars. The budget, as adopted by the Board of Directors, authorizes RT to spend funds. It details how RT allocates tax resources to expenditures, and serves as a benchmark for evaluating accomplishments and assessing fiscal responsibility.



Voting System

RT is governed by an eleven-member Board of Directors. Six entities (5 cities and 1 county) make appointments to RT’s Board. Eight directors are appointed by “member entities” and represent jurisdictions annexed into RT’s district. Three directors are appointed by “participating entities” and represent jurisdictions that contract with RT to receive transit service.

In January 2006, the RT Board directed staff to pursue legislation to change the voting system from a one-member-one-vote system to one that provides for weighted voting based upon the financial contribution made by each entity to RT. Assembly Bill 2137 established the new weighted voting system.

The system creates 100 voting shares. RT allocates the shares to jurisdictions and their members as follows:

- Five shares to each annexed jurisdiction
- Remaining shares to all jurisdictions based on financial contribution of Transit Development Act funds, funds through contracts, other local funds, and federal funds

On March 12, 2007, the RT Board of Directors adopted the new Schedule of Weighted Voting Distribution for the remainder of FY 2007. For all subsequent years, the Schedule is to be included in the proposed budget document and distributed to voting entities at least 60 days in advance of budget adoption. A summary of the tabulated vote shares adopted for the FY 2017 Budget and for the FY 2018 Proposed Abridged Budget is shown in the table below. A detailed FY 2018 Schedule of Weighted Voting is shown on the next page.

Vote Shares By Jurisdiction

Jurisdiction	Status	Shares - FY 2017 Budget	Shares – FY 2018 Proposed
County of Sacramento	Annex	42	41
City of Sacramento	Annex	36	37
City of Rancho Cordova	Annex	10	10
City of Citrus Heights	Contract	5	5
City of Elk Grove	Contract	4	4
City of Folsom	Contract	3	3
Total		100	100

Voting System (continued)

Fiscal Year 2018 Schedule of Weighted Voting Distribution

Base Values*

Federal Financial Information

Code Section:		
102205(b)(6)	<u>FY 17 Federal Funds Available in the Sacramento MSA</u>	37,432,440
102205(b)(7)	<u>Allocation of Federal Funds to jurisdictions other than RT</u>	4,746,353
102205(b)(8)	<u>FY 17 Federal Funds Available for use in RT Service Area:</u>	32,686,087

Jurisdiction Specific Values

	City of Sacramento	County of Sacramento	Rancho Cordova	Citrus Heights	Folsom	Elk Grove	Totals:	
102205(b)(10)	<u>Population:**</u>	482,110	575,928	70,968	85,653	76,122	1,455,902	
	<u>Proportionate Population:</u>	33.11%	39.56%	4.87%	5.88%	5.23%	100.00%	
	<u>Member:</u>	Yes	Yes	Yes	No	No	No	
102100.2, 102100.3		4	3	1	1	1	11	
102105.1(d)(2)(D)	<u>Federal Funds Attributed to Entity (Total Federal Funding x Share of Population):</u>	10,823,730	12,930,014	1,593,285	1,922,974	1,708,996	3,707,090	32,686,087
102105.1(d)(2)(A), 102205(b)(3)	<u>FY 18 State TDA Funds Made Available to RT:</u>	22,779,863	25,770,579	3,353,262	0	0	0	51,903,704
102105.1(d)(2)(B), 102205(b)(4)	<u>FY 18 Funds Provided Under Contract:</u>	397,688	50,000	289,818	3,334,877	1,182,729	350,000	5,605,112
102105.1(d)(2)(C), 102205(b)(5)	<u>FY 18 Other Local Funds</u>	0	0	0	0	0	0	0
102105.1(d)(2)	<u>Total Financial Contribution:</u>	34,001,281	38,750,593	5,236,365	5,257,851	2,891,725	4,057,090	90,194,903
102105.1(d)(2)	<u>Proportionate Financial Contribution:</u>	37.70%	42.96%	5.81%	5.83%	3.21%	4.50%	100.00%

Voting Calculation

	City of Sacramento	County of Sacramento	Rancho Cordova	Citrus Heights	Folsom	Elk Grove	Totals:	
102105.1(d)(1)	<u>Incentive Shares (5 for member jurisdictions)</u>	5	5	5	0	0	0	15
102105.1(d)(2)	<u>Financial Contribution Shares (Proportionate Financial Share x Remainder of 100 shares):</u>	32.0429	36.5187	4.9348	4.9550	2.7252	3.8234	85.0000
102105.1(d)(3)	<u>Total Shares:</u>	37.0429	41.5187	9.9348	4.9550	2.7252	3.8234	100.0000
102105.1(d)(4)(i)	<u>Shares After Rounding:</u>	37	41	10	5	3	4	100
102105.1(d)(4)(i), 102105.1(d)(4)(ii)	<u>Share Adjustment (To Ensure 100 Shares):</u>	37	41	10	5	3	4	100
102105.1(d)(7)	<u>Distribution of Shares Among Members (Assuming All Members Present to Vote):***</u>							
	Member 1	10	14	10	5	3	4	
	Member 2	9	14	N/A	N/A	N/A	N/A	
	Member 3	9	13	N/A	N/A	N/A	N/A	
	Member 4	9	N/A	N/A	N/A	N/A	N/A	
	Member 5	N/A	N/A	N/A	N/A	N/A	N/A	
	<u>Total Votes:</u>	37	41	10	5	3	4	100

* In addition to the funding identified above, RT projects the following funds for operating purposes: \$39,755,998 - Measure A

** Population as measured by the population statistics used by SACOG to allocate TDA funds for the same fiscal year for which the budget is adopted.

*** If, in any vote allocation, any member would have more than 15 votes, that jurisdiction will be given an additional seat and the votes will be reallocated to the larger number of members.

RT Major Goals and Objectives in FY 2018

- Operator Attendance Control – As part of the recent negotiations with the Amalgamated Transit Union (ATU), RT and ATU have agreed to work together to put into place new attendance control measures with the objective of reducing missed trips, improving customer service, reducing costs, streamline RT's processes, and improving service reliability.
- Route Optimization Study (ROS) - Phase 1. With recent downward ridership trends, staff is working on a project to find ways to increase ridership. This project will have many phases and include extensive community engagement. The goal will be to re-imagine RT's system to be consistent with current travel patterns, increase ridership, and reallocate any additional resources. The effort will also seek public input regarding the expansion and customer service priorities for RT with increases in funding.
- Paratransit Business Model – RT understands that lower costs means additional funding, which can be put into service improvements. Finding new ways to provide high quality service to the public, as well as individuals with disabilities, and seniors, in the most cost effective manner will ensure the sustainability of this critical service.
- IT Modernization – RT wants to be on the cutting edge of technology. Offering innovative rider tools to our customers will improve the customer experience by making it easier to ride, quicker to get train information, and provide for faster payment options, including a permanent mobile fare app; real time light rail train arrival information; smart card fare payment system; free Wi-Fi; expanded public information systems; and a secondary light rail warning system.
- Security Program – Phase 1. RT has been very focused on making our system more secure. This starts with additional staff presence on the trains and 24 hour monitoring in the security operations center. There will be increased inspections to reduce theft on the system and improved crime reporting statistics.
- Safety Program – Phase 1. Using technology to improve safety efforts is critical. Better training, and employee and community safety awareness is key. The goal will be to reduce the number of accidents per mile and reduce any findings and recommendations from the Public Utilities Commission (PUC).
- Strategic Communications – Ensuring that our customers can easily navigate RT's bus and light rail system and understand how easy it is to pay and ride is critical to attracting new customers. This will involve launching new programs and incentive options that will encourage more people to try transit. This will be done through creative partnership and incentive programs. This effort will also serve to educate the general public regarding the benefits of transit to the community as a whole.
- Employee and Labor Relations – Salaries and benefits continue to be the largest cost factor for transit agencies, as this is the operational engine behind a successful system. Maintaining an open line of communication with our employees improves productivity and morale, which equates to new ideas and dedication that benefits all. We will develop our priorities and provide new forums for members to give feedback and listen to their concerns.
- Organizational Excellence and Culture Change – We are striving to be a “world class” organization that attracts and retains a quality workforce while providing the necessary training and mobility opportunities for employees to succeed. We will foster professional development and keep up with industry best practices. Motivation, partnership and teamwork will be a message that all employees will hear. All of this will help improve performance in areas such as increased revenues, reduced expenses, improved on time performance, increased inspection rates, and the creation of new jobs.

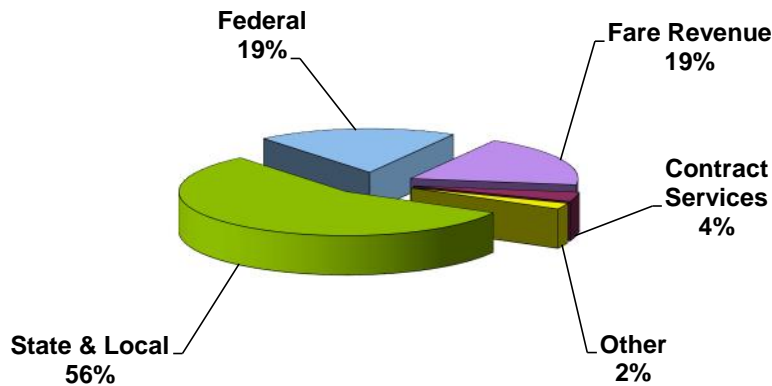
RT Major Goals and Objectives in FY 2018 (continued)

- Campus Master Plan – RT will examine ways to modernize our facilities. This will begin with a comprehensive plan to relocate all administrative staff to one central facility to improve communication. This will improve morale and efficiency.
- Transit Oriented Development – We are examining our various surplus properties to determine if they can be sold to developers that could use the land for purposes that encourage transit use and potentially increase our ridership.
- Sustainability and Business Process Optimization – RT has adopted new fiscal policies to improve its long-term financial position. We are dedicated to strengthening our finances by tapping innovative revenue sources and conducting relentless organizational optimization to fund maintenance and capital investments and to build reserves. Moving forward, we will continue to strive to find new ways to improve our business processes, keep expenses down, and generate opportunities to boost operating revenues. We are implementing a strategic effort to educate the public about the benefits of transit and how local funding is important to create a “world class” public transit system.

Operating Budget Summary

Revenues

FY 2018 Operating Revenue by Funding Source



(Dollars in Thousands)

	FY 2015 Actual	FY 2016 Actual	FY 2017 Budget	FY 2018 Budget	FY 2018 to FY 2017 \$ Change	FY 2018 to FY 2017 % Change
Fare Revenue	\$ 28,396	\$ 28,056	\$ 31,165	\$ 30,572	\$ (593)	-1.9%
Contract Services	5,810	6,110	6,092	5,605	(487)	-8.0%
Other	4,002	78,493	4,840	3,578	(1,262)	-26.1%
State & Local	77,394	34,097	86,110	90,516	4,406	5.1%
Federal	29,767	5,333	34,272	31,033	(3,239)	-9.5%
Total	\$ 145,369	\$ 152,089	\$ 162,479	\$ 161,304	\$ (1,175)	-0.7%
Operating Reserve*	\$ 1,446	\$ 1,095				
Operating Revenue	\$ 146,815	\$ 153,184	\$ 162,479	\$ 161,304	\$ (1,175)	-0.7%

*Operating Reserve: Positive indicates use of the reserve. Negative indicates an increase in the reserve.

Revenues (continued)

Fare Revenue

This category includes the revenues from carrying passengers. This is money paid by the transit riders to use transit services, but also include special transit fares from Los Rios Community College District (Los Rios) and California State University, Sacramento (CSUS) Student pass programs.

The FY 2018 Proposed Budget proposes \$30.6 million in Fare Revenue, an decrease of \$0.6 million (1.9%) from the FY 2017 Budget of \$31.2 million.

- Fare Revenue is anticipated to decrease mainly due to the introduction of a 90-minute ticket, free ride days and to reflect the current trend.
- This also assumes a reduction in Transfer Agreement pay outs based on the recent trend.

Contracted Services

This category includes contracts with the Cities of Citrus Heights, Elk Grove, Folsom, Rancho Cordova, as well as North Natomas shuttle services. These cities and service areas purchase RT transit services.

The FY 2018 Proposed Budget proposes \$5.6 million in Contracted Services revenue, a decrease of \$0.5 million (8.0%) from the FY 2017 Budget of \$6.1 million.

- This reflects a reduction of \$0.5 million in Folsom Light Rail Operating and Maintenance cost due to the change to net billing for services as well as a result of true up calculation for FY 2016 billing.
- This also reflects a decrease in the Granite Park contract of \$0.1 million due to expiration of the contract.
- This also reflects an increase of \$0.1 million in Citrus Heights contract due to higher LTF allocation.

Other

This category includes investment income, commercial real estate leases, advertising income, bus book sales, fare evasion fines, promotional item sales, photo identification activities, and parking revenue.

The FY 2018 Proposed Budget includes \$3.6 million in other revenue, which is a decrease of \$1.3 million (26.1%) from the FY 2017 Budget of \$4.9 million.

- The FY 2018 Proposed Budget includes a reduction in advertising revenue of \$0.5 million due to removing revenue from Arena sponsorship agreement and replacing it with advertising revenue from light rail stations, and from interior and exterior light rail vehicles.
- This includes \$0.2 million for the sale of Federal Renewable Identification Numbers for RT's Compressed Natural Gas (CNG) Bio-Gas fuel and \$1.0 million for the sale of Low Carbon Credits through the State Cap and Trade program.
- This proposal eliminates \$0.65 million in revenue received from the CNG tax rebate program due to expiration of the program on December 31, 2016.

Revenues (continued)

State & Local

This category includes formula-based allocations to RT from state and local government sales taxes. RT receives funding from the California Transportation Development Act Local Transportation Fund (TDA-LTF), the Transportation Development Act State Transit Assistance Program (TDA-STA), and Sacramento County Measure A.

The FY 2018 Proposed Budget proposes \$90.5 million in state and local funding revenue, an increase of \$4.4 million (5.1%) from the FY 2017 Budget of \$86.1 million.

- This reflects a 4.0% or \$1.5 million increase in sales tax estimates for Measure A over the FY 2017 Budget.
- This also reflects a 4.4% or \$1.7 million increase in sales tax estimates for TDA-LTF.
- This includes a 28.1% or \$2.2 million increase in the TDA-STA Revenue compared to the FY 2017 Budget due to \$3.0 million in additional SB1 funds, and a \$0.8 million reduction in the existing STA program due to lower diesel prices.
- This Budget assumes that Traffic Congestion Relief Program (TCRP) funds will be used for the annual Revenue Bond payment in the amount of \$5.5 million.
- This includes \$0.9 million in the Low Carbon Transit Operations Program (LCTOP) revenue, which is a State Cap and Trade program established in 2014 that provides funds to public transportation agencies throughout California for operations that reduce greenhouse gas emissions.

Federal

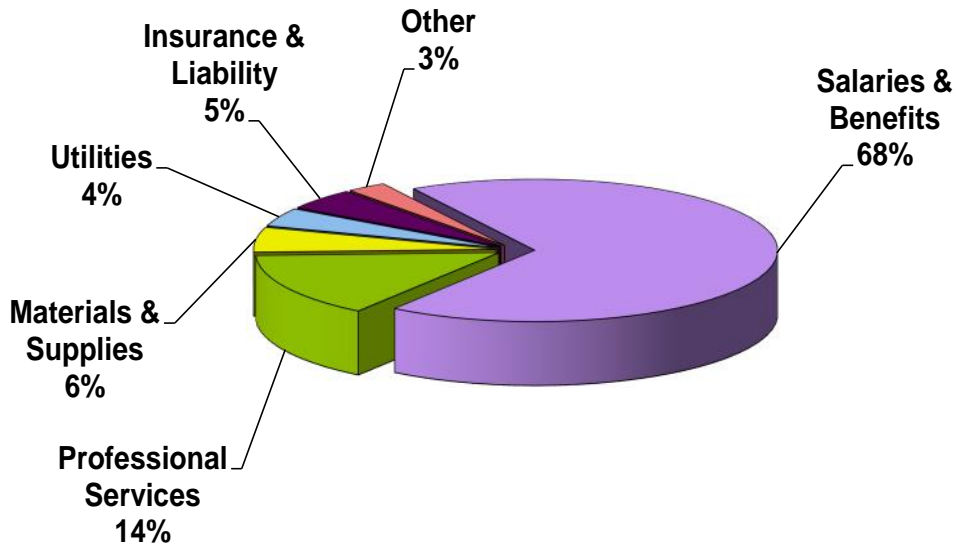
This category includes formula-based allocations to RT from the federal government. Each year Congress authorizes the appropriation, and the FTA allocates the dollars to the region. RT can use the funds for operating, planning, and capital, subject to specific regulations.

The FY 2018 Proposed Budget proposes \$31.0 million in federal funding, a reduction of \$3.2 million (9.5%) from the FY 2017 Budget of \$34.3 million.

- This includes \$0.8 million in Congestion Mitigation Air Quality (CMAQ) revenue for South Line Phase 2, which is a \$1.2 million reduction over FY 2017.
- This includes \$1.0 million in Job Access/Reverse Commute funding, which is an increase of \$0.5 million over FY 2017.
- \$1.0 million of limited-time grant revenues associated with the Sacramento Energy Clean Air Transportation Program (SECAT) was used in FY 2017. This funding source is not available for FY 2018.
- Section 5307 Urbanized Area federal funding is projected to decrease 5% compared to last year.
- Section 5337 State of Good Repair funding is projected to decrease 5% compared to last year.

Expenses

FY 2018 Operating Expenses by Expense Category



(Dollars in Thousands)

	FY 2015 Actual	FY 2016 Actual	FY 2017 Budget	FY 2018 Budget	FY 2018 to FY 2017	
					\$ Change	% Change
Salaries & Benefits	\$ 96,267	\$ 102,133	\$ 107,805	\$ 109,879	\$ 2,074	1.9%
Professional Services	26,338	27,861	28,273	23,499	(4,774)	-16.9%
Materials & Supplies	8,556	7,823	8,450	9,041	591	7.0%
Utilities	5,816	6,288	6,711	6,762	51	0.8%
Insurance & Liability	7,906	7,160	9,057	7,839	(1,218)	-13.4%
Other	1,932	1,919	2,183	4,284	2,101	96.2%
Operating Expenses	\$ 146,815	\$ 153,184	\$ 162,479	\$ 161,304	\$ (1,175)	-0.7%

Expenses (continued)

Salaries & Benefits

This category includes payroll and benefits for all positions authorized by the Board of Directors. It accounts for wages, overtime, pension, dental, medical, FICA, vision, and all other RT-paid employee benefits.

The FY 2018 Proposed Budget proposes \$109.9 million for salaries and benefits, an increase of \$2.1 million (1.9%) from the FY 2017 Budget of \$107.8 million.

- The Fiscal Year 2018 Proposed Budget includes funding for 1039 full time funded positions, which is an increase of 34 funded positions from the Fiscal Year 2017 Budget of 1005 funded positions. See Positions section on page 21 for details.
- Total salaries, overtime and personal service contract costs increased by \$4.0 million (6.9%) from the FY 2017 Budget of \$57.9 million. This reflects various District position salary adjustments, salaries for new positions, increase in overtime cost based on higher wages. This also reflects cost of additional 34 funded positions as well as 25 personal service contractors to move security services in house and to bring Student interns.
- Fringe Benefits cost decreased by \$2.2 million (4.1%) from the FY 2017 Budget of \$53.1 million. This reflects increases of 0.6 million in pension costs, decreases of \$0.2 million in medical costs, decrease of 3.1 million in post-retirement benefits, decrease of \$0.4 million in unemployment cost, increase of \$0.5 million in vacation and sick leave accrual, etc.
- Capital recovery and indirect costs have decreased by \$0.1 million over the FY 2017 Budget. This represents labor charged to capital projects and other initiatives such as the Connect Card Consortium.

Professional Services

This category includes purchased transportation (ADA paratransit) to comply with the Americans with Disabilities Act (ADA), transit security, equipment maintenance, facilities maintenance, legal services, and services provided by outside consultants.

The FY 2018 Proposed Budget proposes \$23.5 million for Professional Services, a reduction of \$4.8 million (16.9%) from the FY 2017 Budget of \$28.3 million.

- This reflects a decrease in ADA paratransit cost of \$3.3 million due to business optimization improvements.
- This includes a \$2.2 million decrease in security services cost due to bringing security services in-house.
- There are other minor increases in various general ledger (GL) accounts that make up the difference.

Materials & Supplies

This category includes fuel, bus and light rail parts, small maintenance tools and equipment, cleaning supplies, printing materials, and general office supplies.

The FY 2018 Proposed Budget proposes \$9.0 million for materials and supplies, an increase of \$0.6 million (7.0%) from the FY 2017 Budget of \$8.4 million.

- This reflects an increase in CNG cost of \$0.8 million.
- This also includes a \$0.3 million reduction in bus parts due to new buses.
- There are other minor increases in various general ledger (GL) accounts that make up the difference.

Expenses (continued)

Utilities

This category includes electricity, water, gas, refuse, and telephone for bus, light rail, and administrative facilities.

The FY 2018 Proposed Budget proposes \$6.8 million for Utilities, an increase of \$0.1 million (0.8%) from the FY 2017 Budget of \$6.7 million.

- This includes increases in costs for water, sanitation, and communications.

Insurance & Liability

This category includes premiums, claims, and attorney fees related to personal liability insurance, property damage insurance, workers' compensation claims, and commercial insurance for amounts in excess of self-insured amounts.

The FY 2018 Proposed Budget proposes \$7.8 million for Insurance & Liability, a decrease of approximately \$1.2 million (13.4%) from the FY 2017 Budget of \$9.0 million.

- This reflects a decrease of \$0.6 million in the projected claims reserves for Property and Liability for FY 2018.
- This also reflects a decrease of \$0.3 million in the projected claims reserves for Workers' Compensation for FY 2018.
- This reflects the updated insurance premium costs.

Other

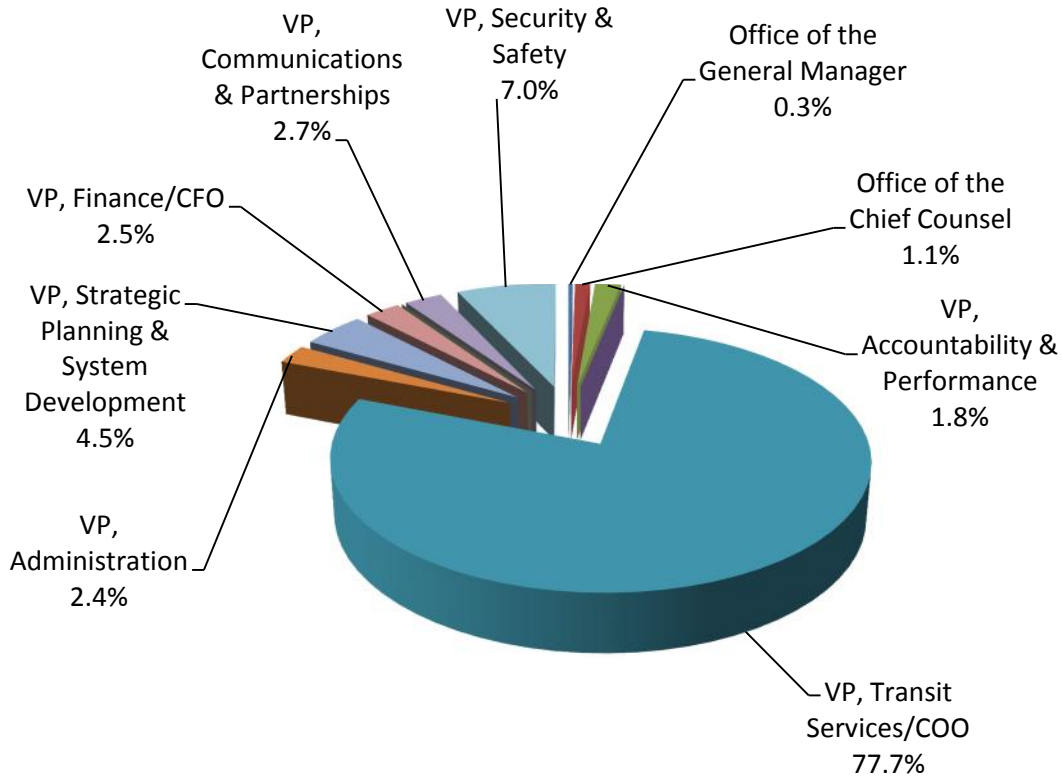
This category includes but is not limited to travel and training, seminars, dues and subscriptions, awards and ceremonies, building leases, equipment leases, taxes, freight, advertising, legal notices, and bad debt.

The FY 2018 Proposed Budget proposes \$4.3 million for other expenditures, an increase of \$2.1 million (96.2%) from the FY 2017 Budget of \$2.2 million.

- This includes \$1.1 million in Connect Card fees, which is RT's portion of running the Connect Card Regional Service Center. About half of this cost is offset by Connect Card labor recovery.
- This reflects an increase of \$0.1 million in property taxes.
- This also reflects creation of Budget Stabilization account with a balance of \$0.45 million in order to address the reserve shortfall, per the adopted Reserve Policy.

Positions

The Fiscal Year 2018 Proposed Budget includes 1,039 fully or partially funded positions, which is an increase of 34 funded positions from the Fiscal Year 2017 Adopted Budget of 1,005 funded positions.



Division	FY 2015 Funded	FY 2016 Funded	FY 2017 Funded	FY 2018 Funded
Office of the General Manager	4	17	6	3
Office of the Chief Counsel	10	18	16	11
VP, Accountability & Performance	0	0	4	19
Facilities & Business Support Services	86	85	0	0
VP, Transit Services/COO	790	792	779	807
VP, Administration	27	0	73	25
VP, Strategic Planning & System Development	23	19	57	47
VP, Finance/CFO	26	25	0	26
Planning & Transit System Development	24	24	0	0
VP, Communications & Partnerships	27	26	33	28
VP, Security & Safety	0	0	37	73
Total	1,017	1,006	1,005	1,039

Positions (continued)

From FY 2017 to FY 2018, the district had a net increase of 34 funded positions. During FY2017, continued GM organizational optimization activities were conducted to realign some departments and divisions. The changes reflected in the FY 2018 proposed budget are as follows:

General Manager Division had a net decrease of 3 funded positions. The position changes are as follows:

- Transferred total of 3 positions in Safety to VP, Security and Safety Division.
- Swapped 1 Deputy General Manager/CEO with a to-be-determined VP position.

Chief Counsel Division had a net decrease of 5 funded positions. The position changes are as follows:

- Transferred total of 4 positions in Labor Relations to VP, Administration Division.
- Swapped 1 Attorney III in Legal with Internal Accountability Auditor in Quality Assurance.

VP, Accountability and Performance Division had a net increase of 15 funded positions. The position changes are as follows:

- Added 1 Internal Accountability Auditor in Quality Assurance (swapped from Attorney III).
- Transferred total of 6 positions in Accessible Services from VP, Communications and Partnerships Division.
- Transferred total of 7 positions in Service Planning from VP, Strategic Planning and System Development Division.
- Added 1 Director, Planning (swapped from Director, Long Range Planning).

VP, Transit Services/Chief Operating Officer (COO) Division had a net increase of 28 funded positions. The position changes are as follows:

- Added 1 Deputy Chief Operating Officer in VP, Transit Services/COO Division
- Funded 3 positions: 1 Operations Trainer, 1 Bus Service Worker, and 1 Mechanic A Body/Fender.
- Unfunded total of 4 positions: 1 Administrative Assistant II in Bus Transportation, 1 Maintenance Superintendent – Bus in Bus Maintenance, 1 Rail Maintenance Worker – HLC in Light Rail, and 1 Director, Community Bus Services in Community Bus Service.
- Transferred total of 14 positions in Information Technology from VP, Administration Division and unfunded 2 positions: 1 Senior Programmer Analyst and 1 IT Software Technician.
- Transferred 2 Materials Management Superintendent and 10 Storekeepers to Bus Maintenance and Light Rail Department from Procurement.
- Converted 5 funded Light Rail Services Workers to Facilities Service Workers. Additionally, the Board authorized to add and fund 3 Facilities Service Workers.
- Converted 1 Maintenance Supervisor-Wayside and 2 Rail Laborer to 3 Rail Maintenance Workers and unfunded 1 Rail Maintenance Worker.

VP, Administration Division had a net decrease of 49 funded positions due to GM reorganization that split into two divisions: VP, Administration and VP, Finance/Chief Financial Officer (CFO). The position changes are as follows:

- Transferred 1 Senior Administrative Assistant to VP, Finance/CFO Division.
- Transferred total of 4 positions in Labor Relations from Chief Counsel Division and unfunded 1 Senior Labor Relations Analyst in Labor Relations.
- Transferred total of 15 positions in Finance and 7 positions in Office Management and Budget to VP, Finance/CFO Division.
- Transferred total of 16 positions in Information Technology to VP, Transit Services/COO Division.
- Transferred total of 2 Materials Management Superintendents and 10 Storekeepers in Procurement to VP, Transit Service/COO Division.
- Unfunded 1 Director, Procurement Services in Procurement.

 Positions (continued)

VP, Strategic Planning and System Development Division had a net decrease of 10 funded positions. The position changes are as follows:

- Swapped 1 Facilities Superintendent with Facilities Supervisor.
- Transferred 1 Senior Administrative Assistant to VP, Accountability and Performance Division.
- Transferred 1 Real Estate Administrator – Asset Management to Real Estate in VP, Finance/CFO Division.
- Swapped 1 Director, Long Range Planning in Strategic Planning with Director, Planning in Service Planning.
- Transferred total of 7 positions in Service Planning to VP, Accountability and Performance Division.

VP, Finance/Chief Financial Officer (CFO) Division had a net increase of 26 funded positions that was split from the VP, Administration Division due to the GM reorganization. The position changes are as follows:

- Added Program Analyst (swapped from Senior Administrative Assistant).
- Reinstated 1 VP, Finance/CFO.
- Transferred total of 15 positions in Finance from VP, Administration Division and added 1 Electronic Fare Collections Systems Administrator.
- Transferred total of 7 positions in Office of Management and Budget from VP, Administration Division.
- Added Grant Analyst (swapped from Senior Financial Analyst).
- Added Treasury Controller (swapped from Director, Finance and Treasury).
- Transferred 1 Real Estate Administrator – Asset Management from Project Management.

VP, Communications and Partnerships Division had a net decrease of 5 funded positions. The position changes are as follows:

- Transferred total of 6 positions in Accessible Services to VP, Accountability and Performance Division.
- Swapped Director, Marketing, Communications and Public Information with Manager, Marketing and Communications.
- Funded 1 Senior Marketing and Communications Specialist.
- Created Customer Advocacy department and transferred 3 Customer Advocacy positions from Customer Services.

VP, Security and Safety Division had a net increase of 36 funded positions due to bringing security services in house. The position changes are as follows:

- The Board authorized and funded an additional 32 Transit Agents and 3 Transportation Supervisors.
- Unfunded 2 Transit Fare Inspectors.
- Transferred total of 3 positions in Safety from General Manager Division.
- Added 1 Chief, Environmental Health and System Safety and unfunded 1 Senior Safety Specialist.

Capital Improvement Plan

Project Overview

The following tables and chart represent the Capital Budget as it pertains to the FY 2018 Budget for the projects listed. The full five-year Capital Improvement Program (CIP) will be adopted by a separate Board action and will cover capital funding priorities between fiscal years 2018 through 2022, and beyond to 2048.

Please keep in mind the amounts contained in the FY 2018 Proposed Budget only pertain to items where anticipated funding sources have been identified and are programmed for FY 2018. There are other capital needs that were outlined during the February strategic planning session where funding has yet to be identified.

The FY 2018 Capital Budget includes projects focused on the following priority programs:

Project Development

- 230 Northeast Corridor Enhancements (Phase 1)
- 410 Blue Line to Cosumnes River College
- R055 Light Rail Station at Dos Rios
- R135 Light Rail Station at Horn
- R327 Green Line SVS Loop
- S030 Downtown/Riverfront Streetcar Project (Small Starts)

Fleet Program

- P009 Paratransit Vehicle Replacement - CNG Project
- R115 Siemens 1st Series Fleet Replacement (26)

Infrastructure Program

- R336 Light Rail Station Enhancements

Facilities Program

- R347 Watt I-80 Elevator

Equipment Program

- M009 Radio Communications System Upgrade

Transit Security & Safety

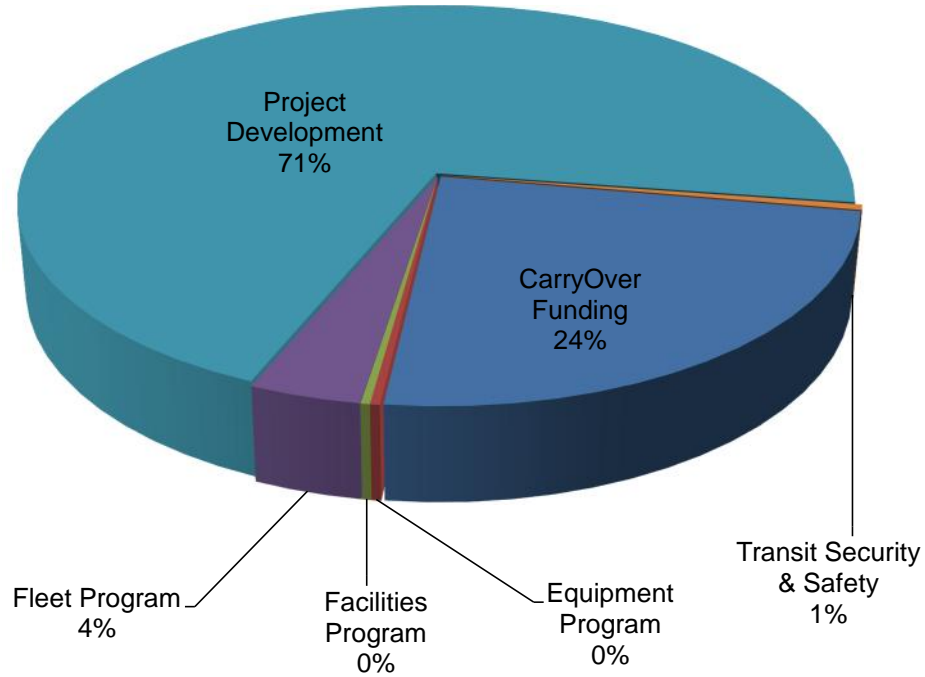
- R344 Enhanced Employee Protection Warning System
- T054 Security, Systems and Communications Infrastructure Upgrade

Impact of Capital Improvements on the Operating Budget

Capital projects that are approved in the current year budget will impact future operating and capital budgets as follows:

1. Capital projects completed in the current year will require on-going maintenance and, in case of new service lines, additional and on-going operating costs.
2. Capital projects that are not completed in the current year will require additional capital funding that may require balancing with operating funding if additional capital funds are not available.
3. Capital projects that are not completed in the current year will affect future years' budgets with increased operating costs in the year of completion. Future on-going operating and maintenance costs are projected using current year baseline dollars.

Capital Improvements by Category



\$ in Thousands

Category	FY2018 Proposed	
Project Development	\$ 209,733	71.1%
Fleet Program	11,097	3.8%
Facilities Program	900	0.3%
Equipment Program	973	0.3%
Transit Security & Safety	1,289	0.4%
Carryover Funding	71,139	24.1%
Grand Total	\$ 295,131	100%

Capital Improvement Revenues and Expenditures

PROGRAM	PROJECT NAME	CARRYOVER FUNDING	FUNDING ADDITIONS			FY 2018 PROJECT BUDGET
			FEDERAL	STATE	LOCAL	
Project Development						
230	Northeast Corridor Enhancement	93,074		5,100,000		5,193,074
404	Green Line to the River District	187,709				187,709
410	South Sacramento Phase 2 LR	26,725,864		7,900,000	300,000	34,925,864
F	Amtrak / Folsom Project	52,420				52,420
R055	Light Rail Station at Dos Rios	29,479	500,000		300,000	829,479
R135	Light Rail Station at Horn	104,696	500,000		500,000	1,104,696
R322	Green Line Draft EIS/EIR and Project Development	643,307				643,307
R327	Green Line SVS Loop	632,000		632,000		1,264,000
R345	CPID - Station Planning	349,178				349,178
S010	Sacramento-West Sacramento Streetcar Starter Line	4,064,464				4,064,464
S030	Downtown/Riverfront Streetcar Project (Small Starts)	5,998,690	100,000,000	55,000,000	39,001,310	200,000,000 *
		<u>38,880,881</u>	<u>101,000,000</u>	<u>68,632,000</u>	<u>40,101,310</u>	<u>248,614,191</u>
Fleet Program						
651	Siemens LRV Mid-Life Overhaul	2,521,612				2,521,612
B139	40' CNG Bus Replacement Procurement	10,352				10,352
B141	Non-Revenue Vehicles - P1B Restricted	1,616,818				1,616,818
B142	Neighborhood Ride Vehicle Replacement (14)	901,988				901,988
B143	Fare Box Replacements	100,972				100,972
B144	BMF CNG Fueling Facility Upgrades	320,553				320,553
B146	Update Bus Design Guidelines	6,138				6,138
F015	Facilities New Freedom Tasks-Add Mini-Hi's	460,960				460,960
G225	Non-Revenue Vehicle Replacement	158,075				158,075
P007	Paratransit Vehicles-CNG-Rep	157,006				157,006
P009	Paratransit Vehicle Replacement - CNG Project	-		7,297,205		7,297,205
R001	CAF/Siemens LRV Painting/Exterior Work	751,494				751,494
R085	UTDC LRV Retrofit and Mid Life Refurbishment	2,000,876				2,000,876
R086	UTDC LRV Retrofit and Mid-Life Refurbishment	501,983				501,983
R115	Siemens 1st Series Fleet Replacement (26)	-		3,800,000		3,800,000
		<u>9,508,827</u>	<u>-</u>	<u>11,097,205</u>	<u>-</u>	<u>20,606,032</u>

* Project S030 is not a SacRT project. Project owners include City of Sacramento and West Sacramento.

Capital Improvement Revenues and Expenditures (continued)

PROGRAM	PROJECT NAME	CARRYOVER FUNDING	FUNDING ADDITIONS			FY 2018 PROJECT BUDGET
			FEDERAL	STATE	LOCAL	
Infrastructure Program						
A001	Watt Avenue / Highway 50 Project Support	1,376				1,376
A005	City College Pedestrian/Bicy	1,683				1,683
A006	Natoma Overhead Widening Project	85,697				85,697
A007	Easton Development Grade Crossing	28,474				28,474
A013	7th & G OCS Pole Relocation	4,601				4,601
G237	Across the Top Systems Modification	56,941				56,941
G238	Repairs per Biennial Bridge Inspection	43,384				43,384
M002	University/65th Street Transit Center Relocation	172,702				172,702
R010	Light Rail Crossing Enhancements	36,089				36,089
R280	Signal - Improve. for Future Gold Line Limited Stop	3,085,726				3,085,726
R334	Rail Capital Maintenance-State of Good Repair	134,122				134,122
R336	Light Rail Station Enhancements	2,119,053		300,000	(300,000)	2,119,053
		5,769,848	-	300,000	(300,000)	5,769,848
Facilities Program						
4005	Butterfield/Mather Mills LR Station Rehabilitation	12,436				12,436
4007	ADA Transition Plan Improvements	345,303				345,303
715	Bus Maintenance Facility #2 (Phase 1&2)	2,821,281				2,821,281
A002	Louis Orlando Transit Center	1,008				1,008
A010	Louis Orlando - Construction	167,667				167,667
B134	Fulton Ave. Bus Shelters	161,888				161,888
B147	Bus Maintenance Management Program	101,924				101,924
F018	Rancho Cordova Landscaping	13,119				13,119
F019	Rancho Cordova Utility Building Enhancements	220,406				220,406
F021	General Facilities Improvements	34,227				34,227
F022	RT Police Substation Relocation	6,656				6,656
F023	Engineering Front Glass Replacement	12,300				12,300
F025	Office Relocation: Bell Building to 1225 R Street	232,759				232,759
F026	Mold Remediation--Engineering Bldg.	90,200				90,200
F027	Metro Roof Replacement	346,603				346,603
R175	Watt / I-80 Station Improvements	14,853				14,853
R313	29th Street Light Rail Station Enhancements	232,133				232,133
R323	Retrofit Light Rail Vehicle (LRV) Hoist	1,070				1,070
R340	LRV Train Wash Replacement	777,072				777,072
R347	Watt I-80 Elevator	-		900,000		900,000
		5,592,905	-	900,000	-	6,492,905
Equipment Program						
F024	Chiller Control Replacement	232,722				232,722
M009	Radio Communications System Upgrade	1,031,709		973,064		2,004,773
R341	Fare Vending Machines	40,999				40,999
R342	Tire Lease Disposal	26,319				26,319
R343	Whiting In-Floor Hoist Inspection and Repair	94,760				94,760
		1,426,509	-	973,064	-	2,399,573

Capital Improvement Revenues and Expenditures (continued)

PROGRAM	PROJECT NAME	CARRYOVER FUNDING	FUNDING ADDITIONS			FY 2018 PROJECT BUDGET
			FEDERAL	STATE	LOCAL	
Transit Technologies Program						
964	Trapeze Implementation (TEAMS)	15,445				15,445
G035	Fiber/50-Fig Installation, Maintenance, & Repair	62,369				62,369
T004	Connect Card Light Rail Platform Preparations	109,928				109,928
T017	Audio Light Rail Passenger Information Signs	359,701				359,701
T030	Revenue Center Security Camera Upgrade	25,364				25,364
T041	Upgrade for Connect Card	35,000				35,000
T046	Connect Card Implementation-Consultant (Part 2)	2,396				2,396
T050	Upgrades to Transit Security Systems	15,480				15,480
T051	Telephone System Replacement	305,250				305,250
T052	Track Warrant Controlled Access Sys	187,450				187,450
		1,118,383	-	-	-	1,118,383
Transit Security & Safety						
G105	Bus Automated Vehicle Location System	2,282				2,282
H021	Emergency Power Generator Enhancement	120,666				120,666
R344	Enhanced Employee Protection Warning System	-	870,000			870,000
T005	CPUC General Order 172 - LVR Camera	43,365				43,365
T006	LRV System AVL Equipment	86,897				86,897
T008	Completion Fiber Optics Communications Backbone	44,066				44,066
T010	Light Rail Facility Hardenin	4,927				4,927
T013	Staff Security Training - Overtime/Backfill	1,380				1,380
T018	Building Access System Upgrade	104,021				104,021
T022	Handheld Smart Card Reader	38,374				38,374
T025	Surveillance and Security Facilities Enhancement	242,204				242,204
T026	WiFi Security Systems Enhancement	15,158				15,158
T027	Video Surveillance System Upgrades	35,473				35,473
T029	Upgrade Bus Fleet Digital Video Recorders	8,062				8,062
T034	Computer Aided Dispatching System	70,765				70,765
T036	Facil. Safety, Security and Commun. Infrastr. upgrades	354,187				354,187
T038	Upgrades to Security Video and Data Systems	89,285				89,285
T043	Emergency Drills	46,448				46,448
T045	Security Operations Center	3,427				3,427
T048	Anti-Terrorism Directed Patrols	22,168				22,168
T054	Security, Systems and Commu. Infra. Upgrade	-		419,045		419,045
		1,333,155	870,000	419,045	-	2,622,200
Planning/Studies						
A008	Regional Bike Share Program	100,000				100,000
A009	Folsom Streetscape	42,316				42,316
M012	Route Optimization	212,370				212,370
R335	Watt/I-80 Transit Center Master Plan	209,357				209,357
		564,043	-	-	-	564,043

Capital Improvement Revenues and Expenditures (continued)

PROGRAM	PROJECT NAME	CARRYOVER FUNDING	FUNDING ADDITIONS			FY 2018 PROJECT BUDGET
			FEDERAL	STATE	LOCAL	
Other Programs						
A012	Construction Oversight Properties at 65th St.	62,381				62,381
A015	Brighton Overhead Design Services	262,208				262,208
M011	Cemo Circle Environmental	30,500				30,500
		<u>355,089</u>	-	-	-	<u>355,089</u>
Subrecipient Programs						
Q008	City of Sacramento Intermodal FD	90,411				90,411
Q016	City of Placerville PNR Construction	813,840				813,840
Q023	Paratransit Inc Replacement	1,763,750				1,763,750
Q027	Paratransit Inc Transit Asset Mgmt Sys	163,292				163,292
Q029	Citrus Heights Bus Stop Improvements	46,999				46,999
Q030	Citrus Heights Transit Enhancements	19,526				19,526
Q033	Paratransit Inc - Bus Purchase	128,906				128,906
Q034	City of Elk Grove Buses	57,648				57,648
Q040	Paratransit Inc.-MDC	300,000				300,000
Q041	City of Roseville - LOTP Construction	1,986,960				1,986,960
Q042	Paratransit Inc. - JARC	125,000				125,000
Q049	El Dorado Transit-Bus Replacement	708,771				708,771
Q050	Subrecipient- Paratransit Inc.	384,000				384,000
		<u>6,589,103</u>	-	-	-	<u>6,589,103</u>
Total		<u>71,138,743</u>	<u>101,870,000</u>	<u>82,321,314</u>	<u>39,801,310</u>	<u>295,131,367</u>

Capital Project Funding Addition Descriptions

- 230 This project includes enhancements that will allow RT to operate limited stop service in the Northeast Corridor. The project's estimate completion date is June 2023.
- 410 By the end of FY18, this project will have extended light rail from Meadowview Station further south to Cosumnes River College (CRC). Remaining activities include the procurement of fare vending machines and passenger information and security features and the relocation of a traction power substation and relay case.
- M009 This project allows for the replacement of radio communication equipment, as needed. Additionally, it phases in the Sacramento Regional Radio Communications System upgrades (P25 upgrade) with final implementation by June 2019.
- P009 Thirty-four vehicles will be purchased between the start of FY18 and August 2019 to replace vehicles at the end of their useful lives.
- R055 Funding is being used to design and build a light rail station on the Northeast Corridor between North B Street and Richards Blvd. on North 12th Street in downtown Sacramento. The completion date is to be determined.
- R115 Replace the (26) 1st Series Siemens vehicles at the end of their engineered life.
- R135 The construction of this new light rail station near Horn Road and Folsom Boulevard by June 2021 will bridge the distance between Butterfield and Mather Field LR Stations.
- R327 This final design and construction phase of the Green Line SVS loop including K St. to H St. improvements will be completed by June 2020.
- R336 This is a phased project to improve light rail stations district wide.
- R344 This project will develop and deploy a fully operational safety technology system that enhances employee-protection warning systems and roadway worker protection. With a completion date of June 2020, it will meet a PUC deadline for implementation of redundant protections for roadway work groups.
- R347 Both Watt I-80 elevators will be replaced under this project.
- S030 The project is a partnership between SACOG, Regional Transit, Yolo County Transit District, City of Sacramento and the City of West Sacramento. It will add a 5.25 mile Downtown Riverfront Streetcar System. Anticipated completion date is September 2022.
- T054 The project, completed by March 2019, will enhance safety and security features at all RT's operational and business facilities, as well as provide upgraded communications and data systems including the conversion to an electronic citation process.

RESOLUTION NO. 17-06-_____

Adopted by the Board of Directors of the Sacramento Regional Transit District on this date:

June 12, 2017

AUTHORIZING THE FILING OF THE FY 2018 TRANSPORTATION DEVELOPMENT ACT CLAIM BASED ON THE ADOPTED BUDGET

BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS OF THE SACRAMENTO REGIONAL TRANSIT DISTRICT AS FOLLOWS:

THAT, the Board hereby authorizes the General Manager/CEO to file a claim with the Sacramento Area Council of Governments (SACOG) for Transportation Development Act funds in the amount not to exceed SACOG's funding apportionments for SacRT for FY 2018 and from said amount, SacRT may claim \$1,323,729 on behalf of SACOG for transportation planning purposes.

ANDREW J. MORIN, Chair

A T T E S T:

HENRY LI, Secretary

By: _____
Cindy Brooks, Assistant Secretary

RESOLUTION NO. 17-06-_____

Adopted by the Board of Directors of the Sacramento Regional Transit District on this date:

June 12, 2017

AMENDING EXHIBIT A OF RESOLUTION NO. 17-04-0047, AND APPROVING NEW JOB DESCRIPTIONS AND SACRT'S AUTHORIZED CLASSIFICATIONS, POSITIONS AND SALARY GRADES.

BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS OF THE SACRAMENTO REGIONAL TRANSIT DISTRICT AS FOLLOWS:

THAT, effective June 13, 2017, Resolution No. 17-04-0047 is hereby amended by deleting Exhibit A and replacing it with the attached Exhibit A, "Authorized Classifications, Positions and Salary Grades".

THAT, effective June 13, 2017, the new job descriptions of Special Assistant, Office of the General Manager/CEO and Program Analyst, attached as Exhibit B, are hereby approved.

ANDREW J. MORIN, Chair

A T T E S T:

HENRY LI, Secretary

By: _____
Cindy Brooks, Assistant Secretary

EXHIBIT A
Effective June 13, 2017
AUTHORIZED CLASSIFICATIONS, POSITIONS, AND SALARY GRADES

<u>Job Classification Titles</u>	<u>Authorized Positions</u>	<u>Positions Filled</u>	<u>Grade</u>
<u>AEA Family:</u>			
Accountant I	0		205
Accountant II	1		108
Assistant Architect	0	0	206
Assistant Engineer	0	0	208
Assistant Planner	2	1	207
Assistant Resident Engineer	2	1	208
Associate Architect****	1	0	109
Associate Civil Engineer****	1	0	110
Associate Engineer	0	0	109
Associate Systems Engineer****	2	1	110
Engineering Analyst I	0		205
Engineering Analyst II	0		207
Engineering Technician	1	0	205
Grants Analyst	1		206
Human Resources Trainer	0		206
Information Technology Business Systems Analyst	0		107
Inspector	0		204
Junior Engineer	0		205
Long Range Planner	0		208
Payroll Analyst	1	1	204
Procurement Analyst I	0	1	205
Procurement Analyst II****	4	1	207
Programmer Analyst I	0		205
Programmer Analyst II	0		208
Quality Assurance Specialist I	0		202
Quality Assurance Specialist II	0		205
Real Estate Analyst I	0		205
Real Estate Analyst II	0		207
Resident Engineer	0		110
Revenue Analyst	1	0	207
Schedule Analyst I	1	1	205
Schedule Analyst II	2	2	207
Senior Accountant	2	2	109
Senior Architect	1	1	111
Senior Civil Engineer	1	0	111
Senior Community and Government Affairs Officer	2	2	108
Senior Engineering Analyst	1	1	109
Senior Engineering Technician	1	1	207
Senior Grants Analyst	2	2	108
Senior Information Technology Business Systems Analyst	3	3	109
Senior Marketing and Communications Specialist	1	1	108
Senior Planner	0		109
Senior Procurement Analyst	3	2	109
Senior Programmer Analyst	2	2	109
Senior Quality Assurance Specialist	1	0	108
Senior Real Estate Analyst	0		108
Senior Social Media & Website Specialist	1	0	109
Senior Strategic Planner	1	1	109
Senior Systems Engineer	1	0	111
Service Planner	1	0	208

* Denotes Change in Classification/Count
(1) Increase in Position(s)
(2) Decrease in Position(s)
** No Grade, Salary by Employment Contract
*** No Grade, Salary Stated in MOU
**** HLC included in total

<u>Job Classification Titles</u>	<u>Authorized Positions</u>	<u>Positions Filled</u>	<u>Grade</u>
Vehicle Equipment Maintenance Specialist	0		207
Video Communications Systems Analyst	1	1	208
Total General Family Allocations:	45	28	

* Denotes Change in Classification/Count
(1) Increase in Position(s)
(2) Decrease in Position(s)
** No Grade, Salary by Employment Contract
*** No Grade, Salary Stated in MOU
**** HLC included in total

<u>MANAGEMENT & CONFIDENTIAL FAMILY:</u>	<u>Job Classification Titles</u>	<u>Authorized</u>	<u>Positions</u>	<u>Grade</u>
		<u>Positions</u>	<u>Filled</u>	
	Accessible Services Administrator	0	0	110
	Administrative Assistant I (GM, Labor Relations & Legal Cost Centers)	0		200
	Administrative Assistant II (GM, Labor Relations & Legal Cost Centers)	2	0	202
	Attorney I	0		108
	Attorney II	0	1	110
	Attorney III****	3	2	112
	Chief Counsel	1	1	**
	Chief Auditor	1	0	113
	Chief, Environmental Health & System Safety	1	1	113
	Clerk to the Board	1	1	208
	Community Bus Services Superintendent	0		110
	Deputy Chief Counsel	1	1	V
*(1)	Deputy General Manager/CEO	1	0	VI
	Deputy Chief Operating Officer	1	1	114
	Director, Accessible Services	1	1	112
	Director, Bus Maintenance	1	1	112
	Director, Civil and Track Design	1	1	113
	Director, Community Bus Services	0	1	112
	Director, Construction Management	1	1	112
	Director, Facilities	1	0	112
	Director, Human Resources	1	1	112
	Director, Information Technology	1	1	112
	Director, Labor Relations	1	1	112
	Director, Light Rail	1	1	113
	Director, Long Range Planning	0	0	112
	Director, Office Management and Budget	1	1	112
	Director, Organizational Development	0		112
	Director, Planning	1	1	112
	Director, Procurement Services	1	0	112
	Director, Project Management	1	1	112
	Director, Marketing, Communications and Public Information	1	1	112
	Director, Real Estate	0		112
	Director, Scheduling	1	1	112
	Director, Systems Design	0		113
	Director, Transportation	1	0	112
	EEO Administrator	1	1	110
	Electronic Fare Collection Systems Administrator	1	1	110
	Executive Assistant	1	1	207
	Facilities Superintendent	1	0	111
	General Manager/CEO	1	1	**
	Human Resources Administrator	1	1	110
	Human Resources Analyst I	1	1	205
	Human Resources Analyst II	2	2	208
	Internal (Accountability) Auditor	1		112
	Labor Relations Analyst I	1	1	205
	Labor Relations Analyst II	0		208
	Legal Secretary	1	1	204
	Maintenance Superintendent - Bus	1	0	111
	Maintenance Superintendent - Light Rail	1	1	111
	Maintenance Superintendent - Wayside	1	1	111
	Manager, Accounting	1	1	110
	Manager, Community and Governmental Affairs	0		111
	Manager, Contracts and Disadvantaged Business Enterprise	1	1	110
	Manager, Customer Service	1	1	110

* Denotes Change in Classification/Count

(1) Increase in Position(s)

(2) Decrease in Position(s)

** No Grade, Salary by Employment Contract

*** No Grade, Salary Stated in MOU

**** HLC included in total

<u>Job Classification Titles</u>	<u>Authorized Positions</u>		<u>Grade</u>
	<u>Positions</u>	<u>Filled</u>	
Manager, Enterprise Resources and Databases	1	1	111
Manager, Grants	1	1	110
Manager, Marketing and Communications	1	0	111
Manager, Quality Assurance	0		111
Manager, Real Estate	1	0	111
Manager, Revenue	1	1	110
Materiel Management Superintendent	3	2	110
Network and End User Operations Administrator	1	0	110
Operations Training Administrator	0		110
Paralegal	0		205
Payroll Supervisor	1	1	109
Pension and Retiree Services Administrator	1	1	110
Police Services Superintendent	1	0	110
Principal Civil Engineer	1	1	112
Principal Planner	1	1	110
Principal Systems Engineer	1	1	112
*(1) Program Analyst	1	0	107
Purchasing and Materials Administrator	1	0	110
Quality Assurance Administrator	1	1	110
Real Estate Administrator - Acquisitions	0		109
Real Estate Administrator - Asset Management	1	1	109
Real Estate Administrator - Transit Oriented Development and Joint Development	0		109
Risk Administrator	1	1	110
Risk Analyst I	0		204
Risk Analyst II	2	1	207
*(2) Senior Administrative Assistant	5	4	206
Senior Attorney	1	1	113
Senior Classification and Compensation Analyst	0		108
Senior Financial Analyst	2	2	108
Senior Human Resources Analyst****	4	3	109
Senior Labor Relations Analyst	2	1	109
Senior Paralegal	2	1	207
Senior Risk Analyst	1	1	109
Senior Schedule Analyst	0		108
*(1) Special Assistant, Office of the General Manager/CEO	1	0	111
Transportation Superintendent - Bus	3	3	110
Transportation Superintendent - Light Rail	2	2	110
Transportation Superintendent - Police Services	0	1	110
Treasury Controller	1	0	111
Vice President, Accountability and Performance	1	1	III
Vice President, Administration	1	1	III
Vice President, Communications and Partnerships	1	1	III
Vice President, Finance / Chief Financial Officer	1	1	IV
Vice President, Security and Safety	1	0	IV
Vice President, Strategic Planning and System Development	1	1	IV
Vice President, Transit Services / Chief Operating Officer	1	1	V
Total Management and Confidential Allocations:	99	76	
Total District-wide Salaried Allocations:	144	104	

* Denotes Change in Classification/Count
(1) Increase in Position(s)
(2) Decrease in Position(s)
** No Grade, Salary by Employment Contract
*** No Grade, Salary Stated in MOU
**** HLC included in total

<u>Job Classification Titles</u>	<u>Authorized Positions</u>	<u>Positions Filled</u>	<u>Grade</u>
<u>AFSCME 146 Family:</u>			
Accessible Services Eligibility Specialist	3	3	205
Administrative Assistant I	0	0	200
Administrative Assistant II****	10	5	202
Administrative Supervisor	1	0	***
Administrative Technician	14	13	204
Communications Infrastructure Specialist	1	0	207
Community Bus Services Dispatcher Supervisor	5	4	***
Customer Advocacy Supervisor	1	1	***
Customer Advocate I	2		201
Customer Service Supervisor	1	1	***
Facilities Supervisor	3	3	***
Graphic Designer	2	2	205
Information Technology Project Coordinator	1	0	109
Information Technology Technician I	0		205
Information Technology Technician II	2	1	206
Maintenance Supervisor - Bus	8	8	***
Maintenance Supervisor - Light Rail	11	11	***
Maintenance Supervisor - Wayside	5	4	***
Maintenance Trainer - Bus	1	1	***
Maintenance Trainer - Light Rail	1	1	***
Marketing and Communications Specialist	1	0	206
Network Operations Engineer	2	2	208
Network Operations Technician	2	3	205
Operations Trainer	4	2	209
Route Check Supervisor	0		***
Route Checker	4	4	200
Safety Specialist I	0		205
Safety Specialist II	0	1	207
Senior Customer Advocate	1	1	205
Senior Facilities Specialist	2	0	109
Senior Inspector	1	0	206
Senior Safety Specialist****	2	1	109
Transit Officer Supervisor	1	0	***
Transportation Supervisor	53	53	***
*(1) Transportation Supervisor - Police Services	4	2	***
Total AFSCME 146 Allocations:	149	127	

* Denotes Change in Classification/Count
(1) Increase in Position(s)
(2) Decrease in Position(s)
** No Grade, Salary by Employment Contract
*** No Grade, Salary Stated in MOU
**** HLC included in total

<u>Job Classification Titles</u>	<u>Authorized Positions</u>	<u>Positions Filled</u>	<u>Grade</u>
<u>ATU 256 Family:</u>			
Accounting Technician	1	0	***
Accounts Payable Clerk	2	1	***
Claims Technician	1	1	***
Customer Service Clerk	1	0	***
Customer Service Representative	14	12	***
Fare Prepayment Clerk	1	1	***
Operators (Bus, CBS and Light Rail combined)	475	475	***
Payroll Technician	1	1	***
Procurement Clerk	2	1	***
Reception Clerk	1	1	***
Revenue Clerk	3	2	***
Senior Clerk	1	1	***
Transit Agent	70	26	***
Transit Fare Inspector	13	6	***
Treasury Clerk	1	1	***
Total ATU 254 Allocations:	587	529	
<u>IBEW 1245 Family:</u>			
Bus Service Worker	29	23	***
Electronic Mechanic	3	3	***
Facilities and Grounds Worker I	2	2	***
Facilities and Grounds Worker II	4	6	***
Facilities Electronic Technician	1	1	***
Facilities Maintenance Mechanic****	16	6	***
Facilities Service Worker	17	17	***
Journey Lineworker	0	3	***
Light Rail Assistant Mechanic	8	7	***
Light Rail Service Worker	16	12	***
Light Rail Vehicle Technician	38	35	***
Lineworker	0	6	***
Lineworker Technician****	20	7	***
Mechanic A	26	24	***
Mechanic A (Body/Fender)	7	6	***
Mechanic A (Gasoline/Propane)	2	2	***
Mechanic B	8	5	***
Mechanic C	17	13	***
Painter	1	1	***
Rail Laborer	5	5	***
Rail Maintenance Worker	10	7	***
Senior Mechanic	0		***
Senior Rail Maintenance Worker	2	2	***
Storekeeper	10	9	***
Upholsterer	1	1	***
Total IBEW 1245 Allocations:	243	203	
TOTAL AUTHORIZED ALLOCATIONS:	1123	963	

* Denotes Change in Classification/Count
(1) Increase in Position(s)
(2) Decrease in Position(s)
** No Grade, Salary by Employment Contract
*** No Grade, Salary Stated in MOU
**** HLC included in total

Salaried Classification Series

Note: A vacancy occurring within a salaried classification series may be filled at the same level as that vacated or at any lower level provided that only the one vacancy is filled.

Accessible Services Eligibility Specialist, Administrator
Accountant I, II, Senior
Administrative Assistant I, II, Technician, Senior, Supervisor
Assistant Architect, Associate, Senior
Assistant Planner, Service Planner, Long Range Planner, Senior Planner, Senior Strategic Planner, Principal Planner
Attorney I, II, III, Senior
Customer Advocate I, Senior
Engineering Analyst I, II, Senior
Engineering Technician, Senior
Grants Analyst, Senior
Human Resources Analyst I, II, Senior, Administrator
Information Technology Technician I, II
Inspector, Senior Inspector, Assistant Resident Engineer, Resident Engineer
IT Business Systems Analyst, Senior
Junior Engineer, Assistant, Associate, Associate Civil, Senior, Principal
Junior Engineer, Assistant, Associate, Associate Systems, Senior, Principal
Labor Relations Analyst I, II, Senior
Marketing and Communications Specialist, Senior
Network Operations Technician, Network Operations Engineer, Network and End User Operations Administrator
Network Operations Technician, Video Communications Systems Analyst, Network and End User Operations Administrator
Paralegal, Senior
Payroll Analyst, Supervisor
Procurement Analyst I, II, Senior
Programmer Analyst I, II, Senior
Quality Assurance Specialist I, II, Senior, Administrator
Real Estate Analyst I, II, Senior, Administrator
Risk Analyst I, II, Senior, Administrator
Safety Specialist I, II, Senior
Schedule Analyst I, II, Senior

EXHIBIT B
List of New and Modified Job Descriptions
Effective June 13, 2017

Job Description - Previous Title	Disposition	Job Description - Modified / New Title
N/A	New	Special Assistant, Office of the General Manager/CEO
N/A	New	Program Analyst



Title: Special Assistant, Office of General Manager/CEO

FLSA Status: EXEMPT

BRIEF DESCRIPTION:

This position is responsible for assisting the General Manager (GM)/CEO by performing the more highly complex and cross-divisional specialized duties, tasks, and responsibilities related to strategic operations of the District associated with specific projects, programs, and initiatives. The Special Assistant will have responsibility for developing and communicating divisional and/or departmental policy for high level projects having broad impact across multiple areas; in this capacity, the incumbent will make policy recommendations that will have District-wide impact in a wide variety of areas such as program enhancements, strategies, and continuous improvement efforts related to the functions of the District necessary to assure accomplishment of the RT’s vision, mission, Strategic Plan, and Strategic Initiatives. Under general direction by the GM/CEO, the Special Assistant will be responsible for planning, developing, organizing, coordinating, facilitating, and directing numerous strategic activities related to the goals, priorities, and objectives of the District.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

(S) Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.	(L) Light Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree.	(M) Medium Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly.	(H) Heavy Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly.	(V) Very Heavy Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly.
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#	Code	Essential Functions
1	S	Support the GM/CEO by providing executive level management oversight and strategic direction to assigned projects, programs, administrative matters, and special assignments. Serve as project manager; facilitate project/program and/or assignment activities and resolve issues timely; be highly responsive and provide outstanding customer service; and develop and submit detailed reports and completed staff work to the GM/CEO, EMT, Board of Directors, internal and external stakeholders, other government/transit agencies, outside consultants, and business partners. Research, analyze, implement, evaluate, and follow up on related policies and procedures. Proactively question, research, and resolve complex and sensitive issues raised by EMT/management staff, and others and work collaboratively with other departments to provide assistance and advice on various matters. Research and analyze findings for departmental implications; make recommendations to the GM/CEO regarding the impacts and potential outcomes of efforts undertaken. Work collaboratively with the EMT, senior management team, various departments and business contacts in the formation, coordination, implementation, and follow up of policies, programs and projects that are developed at the GM/CEO and EMT level. Ensure staff work on various project is completed timely and submitted/routed for review, approval, and/or signature.
2	S	Coordinate the day-to-day operations of the GM/CEO’s office, executive level administrative support and/or other administrative support. Coordinate responses and establish communication to RT employees, Board Members, stakeholders, community leaders and the public, event planning/attendance, workload and project activities, and/or



		changing priorities. Attend, participate in, and/or facilitate various meetings. Monitor, follow up, and research items on the GM/CEO and/or EMT meeting schedule/agenda; prepare and/or review corresponding reports of findings and recommendations. Assist in budget analysis and feasibility studies for the cost of new functions. Prepare and monitor the GM/CEO office's budget, including monitoring payment requests, balances, planning the annual budget, and managing unexpected variables.
3	S	Respond promptly to Board/constituent/internal and external stakeholder inquiries, requests for information, complaints by gathering information, coordinating with staff or others, and formulating high level responses consistent with the mission, goals, and Strategic Vision of the District.
4	S	Attend meetings during both workday and evenings in the community, including Neighborhood Services Area meetings, neighborhood association meetings, and special meetings in the community. Oversee the preparation and organization of GM/CEO and Board meetings, including the location, equipment, agenda, and participants. Prepare and conduct presentations, including PowerPoint slides and complete talking points, on a variety of strategic initiatives/plans and projects.
5	S	Provide the highest level oversight of all administrative functions associated with the management of the GM/CEO's office including maintenance of calendars, tracking of incoming and outgoing documents, emails, voicemails, issue papers, correspondence, etc. Oversee and maintain the scheduling of all events, meetings, conferences and numerous calendar items. Proactively arrange representation in lieu of GM/CEO attendance at various meetings/events. Provide evening and weekend support to all GM/CEO inquiries and through various communication methods. Ensure after-hours issues are resolved timely and in accordance with RT's policies, practices, mission, values, and Strategic Vision.
6	S	Serve as a member of the District on various teams and committees (business community, local, state and federal); represent the EMT in a variety of capacities as assigned. Represent the District at national, state, and local conferences. Consult with Board members/staff, government agencies, the business community, internal and external stakeholders, and private organizations to explore new ideas and resolve issues; establish and maintain an effective system of communications throughout the organization; and perform other related duties as assigned.



JOB REQUIREMENTS:

-Description of Minimum Job Requirements-	
Formal Education	<p>Four (4) years of college resulting in a Bachelor’s degree or equivalent from an accredited college or university in Business Administration, Public Administration or a related field. A Master’s degree in similar disciplines is preferred.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each one (1) year of education.</p>
Experience	<p>A minimum of five (5) years of progressively responsible executive support experience in the planning, developing, organizing, and directing of strategic administrative activities related to the goals, priorities, or objectives of an organization, including two (2) years of supervisory experience. Public sector, transit or transportation experience is preferred.</p>
Supervision	<p>Work requires supervising, training, coaching, and monitoring the performance for a regular group of employees or department including providing input on hiring/disciplinary actions and work objectives/ effectiveness, performance evaluations, and realigning work as needed.</p>
Human Collaboration Skills	<p>Decisions regarding implementation of policies may be made. Contact may involve support of controversial positions or the negotiations of sensitive issues or important presentations. Contacts may involve stressful, negative interactions with the public requiring high levels of tact, and the ability to respond to aggressive interpersonal interactions.</p>
Freedom to Act	<p>The employee normally performs the duty assignment according to his or her own judgment, requesting supervisory assistance only when necessary. Special projects are managed with little oversight and assignments may be reviewed upon completion. Performance is reviewed periodically.</p>
Technical Skills	<p>Advanced: Work requires advanced skills and knowledge in approaches and systems, which affect the design and implementation of major programs and/or processes organization-wide. Independent judgment and decision making abilities are necessary to apply technical skills effectively.</p>
Budget Responsibility	<p>Position has major fiscal responsibility. Is responsible for department-wide financial decisions. Assures that appropriate linkages exist between budget requests and departmental goals and objectives. Monitors a budget plan and adjusts as necessary.</p>
Reading	<p>Advanced: Ability to read literature, books, reviews, scientific or technical journals, abstracts, financial reports, and/or legal documents. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.</p>
Math	<p>Advanced: Ability to apply fundamental concepts of theories, work with advanced mathematical operations methods, statistics, and functions of real and complex variables. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.</p>
Writing	<p>Advanced: Ability to write reports, editorials, journals, speeches, talking points, manuals, or critiques. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.</p>
Certification & Other Requirements	<p>Project Management Professional Certificate from an accredited program is preferred.</p>



KNOWLEDGE
<ul style="list-style-type: none">• Purpose, organization, policies and programs associated with a local public agency/special district.• Thorough knowledge of the principles and practices of public relations and communications programs and/or program/project campaign strategies.• Demonstrated high level interpersonal and communication skills including mediation and conflict resolution skills.• Administrative procedures to be followed in the management of numerous projects/programs and initiatives.• Project management methodologies and application.• Office management principles, methods and procedures.• Legislative/local government processes and organizations.• Local, State and/or Federal budget experience.• Well-developed knowledge of local community cultures, leaders, customs and practices through prior involvement in the community.• Principles of administration and program management.• District policies, procedures, and functions.• Budget development and administration.• Contract administration procedures.• Procurement and contracting principles and practices.• Interviewing and negotiation techniques.• Principles of management, supervision and training.
SKILLS
<ul style="list-style-type: none">• Advanced word processing, spreadsheet, presentation, and database software.• Specialized software related to functional area.



ABILITIES

- Communicate effectively with external organizations and community groups about public transit and the goals/objectives of the District both orally and in writing.
- Provide oral presentations before large/small groups of people.
- Exercise considerable tact and courtesy in frequent contact with the public.
- Establish and maintain effective working relationships as necessitated by work assignments.
- Maintain complete and accurate records and statistics and to develop meaningful reports from that information.
- Act as project representative or Lead.
- Articulate and deliver information both technical and general at community level.
- Ability to quickly assimilate information specific to the project, from both a technical and local perspective.
- Ability to source and filter information for feeding back to the community.
- Demonstrated ability to liaise with all levels of the community.
- Demonstrated event management and time management skills.
- Plan, organize, direct, coordinate, and supervise work and staff engaged in the assigned functional area.
- Continuously practice good judgement and patience in all interactions
- Gather, assemble, analyze, and evaluate customer and public information and make strategic analyses and projections.
- Analyze and resolve a variety of complex administrative issues.
- Resolve sensitive issues raised by the community on District operations.
- Serve on assigned local, regional, and national committees.
- Prepare clear and concise administrative and technical reports.
- Prepare and monitor complex budgets.
- Manage and supervise large numbers of employees and consultants effectively.
- Gather, assemble, analyze, and evaluate facts evidence, data, and other information in order to draw reasonable and fair conclusions and make sound decisions.
- Interpret and apply laws, rules, regulations, and legal precedents impacting the assigned area.
- Analyze and resolve a variety of complex organizational, staffing, and related issues.
- Maintain comprehensive records and reports.
- Establish and maintain adequate cost and schedule controls.
- Analyze a variety of complex operational and administrative problems and develop corrective actions, follow up procedures, and policies.
- Serve as a technical advisor to the GM/CEO and Board of Directors on a variety of issues.
- Collect and analyze data and prepare comprehensive concise reports, and effectively represent the areas which are responsible to other District divisions, stakeholders, the community and the appropriate governmental bodies.
- Promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with "X"-				
Sedentary X	Light	Medium	Heavy	Very Heavy
Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.	Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.	Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.	Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly.	Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

PHYSICAL DEMANDS:

C Continuously 2/3 or more of the time.	F Frequently From 1/3 to 2/3 of the time.	O Occasionally Up to 1/3 of the time.	R Rarely Less than 1 hour per week.	N Never Never occurs.
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Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

-Physical Demand-	-Frequency-	-Brief Description-
Standing	F	Making presentations, Observing work duties, Communicating with Co-workers and the public
Sitting	C	Desk work, meetings, driving
Walking	F	To other departments/offices, around work site
Lifting	R	Supplies, files, etc.
Carrying	R	Supplies, equipment, files, etc.
Pushing/Pulling	O	File drawers, tables and chairs
Reaching	O	For supplies, files
Handling	F	Paperwork, files, etc.
Fine Dexterity	F	Using computer keyboard, calculator, etc.
Kneeling	R	Filing in lower drawers
Crouching	R	Filing in lower drawers; Retrieving items from lower shelves/ground
Crawling	N	
Bending	O	Filing in lower drawers, retrieving items from lower shelves
Twisting	F	From computer to telephone, getting inside vehicle
Climbing	C	Stairs (no elevator in Finance building)
Balancing	R	On step stools
Vision	C	Reading, computer screen, driving, observing work site
Hearing	C	Communicating via telephone/radio or in person to co-workers and the public
Talking	C	Communicating via telephone/radio or in person to co-workers and the public
Foot Controls	R	Driving
Other (specified if applicable)		

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, fax machine, copier, vehicle, calculator, computer and associated hardware and software.



ENVIRONMENTAL FACTORS:

C Continuously	F Frequently	O Occasionally	R Rarely	N Never
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D Daily	W Several Times Per Week	M Several Times Per Month	S Seasonally	N Never
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-Health and Safety Factors-	
Mechanical Hazards	N
Chemical Hazards	N
Electrical Hazards	R
Fire Hazards	R
Explosives	N
Communicable Diseases	N
Physical Danger or Abuse	R
Other (see 1 below)	

-Environmental Factors-	
Respiratory Hazards	N
Extreme Temperatures	S
Noise and Vibration	N
Wetness/Humidity	N
Physical Hazards	N

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED: None

NON-PHYSICAL DEMANDS:

F Frequently From 1/3 to 2/3 of the time	O Occasionally Up to 1/3 of the time	R Rarely Less than 1 hour per week	N Never Never occurs
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-Description of Non-Physical Demands-	-Frequency-
Time Pressure	F
Emergency Situation	O
Frequent Change of Tasks	F
Irregular Work Schedule/Overtime	F
Performing Multiple Tasks Simultaneously	F
Working Closely with Others as Part of a Team	F
Tedious or Exacting Work	F
Noisy/Distracting Environment	O
Other (see 2 below)	

(2) N/A

PRIMARY WORK LOCATION:

Office Environment	X	Vehicle	
Warehouse		Outdoors	
Shop		Other (see 3 below)	
Recreation/Neighborhood Center			

(3) N/A

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.



CLASS HISTORY:

Adopted: 06/17
Revised:
Title Change:
Maintenance Update:
Abolished:
Job Key: TBD



Title: Program Analyst

FLSA Status:

BRIEF DESCRIPTION:

The purpose of this position is to perform professional analytical and technical level project work in the administration, coordination and management of a single program or project of moderate visibility, or assists in managing one or more major programs. This is accomplished by researching, compiling, and evaluating data and making recommendations; preparing reports and budgets; and coordinating program activities with other departments or outside agencies. Other duties include providing operating and capital budget management support, managing departmental contracts and providing complex administrative support to the assigned division. Specific responsibilities depend upon assignment and incumbents may be cross-trained or reassigned as necessary.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

(S) Sedentary	(L) Light	(M) Medium	(H) Heavy	(V) Very Heavy
Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.	Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree.	Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly.	Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly.	Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly.

#	Code	Essential Functions
1	S	Plans, organizes and administers/manages various special programs. Performs research and analysis in the development of program activities, including program compliance and eligibility, regulatory issues, and funding requirements. Performs research and prepares studies as required; conducts surveys, compiles and analyzes data and formulates program policies and procedures; monitors and evaluates program effectiveness and outcomes; prepares periodic or specialized reports of program activities. Makes presentations to senior management/Executive Management as it relates to program work. Provides program training to departments as needed. Reviews and provides recommendations for updates to standard operating procedures. Provides recommendations for budget projections and assists with budget preparation and administration. Assists in determining financial methods, procedures and costs pertaining to a departmental service or program; conducts cost benefit analyses and reviews and prepares financial and statistical reports. Coordinates contract arrangements with other organizations and private parties.
2	S	Reviews monthly department/division budget and expenditures; manages departmental contracts including the development of scope of work, identifying funding, creating proposals, bids and purchase orders and processing invoices. Provides complex administrative support to assigned department to include preparing and ensuring submission of regularly scheduled information such as payroll; making travel arrangements, scheduling meetings, completing agenda packets and conducting surveys for best practices. Compiles, analyzes and summarizes statistical information from a variety of sources and creates related reports. Creates and provides ad hoc reports as needed. Creates tables and queries



as requested to maintain various Department databases. Creates templates and forms for the department. Troubleshoots department databases as required.



JOB REQUIREMENTS:

-Description of Minimum Job Requirements-	
Formal Education	<p>Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four (4) years of an accredited college or university resulting in a Bachelor's degree or equivalent in Human Resources, Business Administration, Public Administration, Organizational Development, Economics, Finance or a closely related field.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p>
Experience	<p>A minimum of three (3) years of experience in report writing, research, analysis and/or technical support in the areas of administration, program management or system operations. Public sector experience is preferred. Experience in the program area is desirable.</p>
Supervision	<p>Work requires functioning as a lead worker performing essentially the same work as those directed, and includes overseeing work quality, training, instructing and scheduling work.</p>
Human Collaboration Skills	<p>Work may require providing advice to others outside direct reporting relationships on specific problems or general policies. Contact may require the consideration of different points of view to reach agreement. Elements of persuasion may be necessary to gain cooperation and acceptance of ideas.</p>
Freedom to Act	<p>The employee normally performs the job by following established standard operating procedures and/or policies. There is a choice of the appropriate procedure or policy to apply to duties. Performance is reviewed periodically.</p>
Technical Skills	<p>Skilled: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization.</p>
Budget Responsibility	<p>Position has limited fiscal responsibility. May assist in the collection of data in support of recommendations for departmental budget allocations. May monitor division or program/project level budget and expenditures.</p>
Reading	<p>Advanced - Ability to read literature, books, reviews, scientific or technical journals, abstracts, financial reports, and/or legal documents. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.</p>
Math	<p>Intermediate - Ability to deal with a system of real numbers; and practical application of fractions, percentages, ratios/proportions and measurement. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.</p>
Writing	<p>Intermediate: Ability to write reports, prepare business letters, expositions and summaries with proper format, punctuation, spelling and grammar using all parts of speech. Ordinarily, such education is obtained in high school up to college. However, it may be obtained</p>



from experience and self-study.
Certification & Other Requirements

KNOWLEDGE
<ul style="list-style-type: none"> • Principle and practices of program management, analyst and coordination. • Principles of program performance measurement, systems analysis, and statistical measurement. • Research techniques, methods, and procedures; basic methods of statistical analysis. • Methods of reporting information. • Principles and practices of organization and public administration. • Principles, methods, and practices of municipal finance, budgeting and accounting. • Principles, methods, and practices of procurement, contracting, and/or grant writing. • Applicable Federal, State and local laws and regulations.

SKILLS
<ul style="list-style-type: none"> • Advanced word processing, spreadsheet, presentation and database software. • Specialized software related to functional area. • Email, contact management, and scheduling software.

ABILITIES
<ul style="list-style-type: none"> • Effectively administer assigned program responsibilities. • Analyze, compare, prioritize and evaluation complex data. • Apply customer service skills, continuously representing the District in a positive way, handling all internal/external contacts with courtesy, diplomacy, and tact. • Review organization and administrative problems; recommend and implement appropriate courses of action. • Conduct research, prepare and present advocacy materials in a clear and concise manner both orally and in writing. • Define problem areas, collect and evaluate data and recommend alternative solutions to complex issues and problems. Formulate recommendations and project consequences of recommendations. Be creative in developing and introducing new ideas, using initiative and good judgment. • Effectively present information and respond to questions from groups, managers, customers, and the general public. • Establish and maintain effective working relationships with employees, other agencies and the public. • Exercise independent sound judgment and make decisions in a manner consistent with the essential job functions. • Extract and analyze statistics and written information from reports and transfer to other documents. • Successfully manage multiple programs/projects, priorities and schedules simultaneously. • Lead project teams to positive solutions and outcomes. • Learn departmental systems, methods, tasks, and procedures. • Learn District and other departmental operation policies and procedures.



- Manage and administer a broad range of tasks including resolving complaints, counseling managers and employees on the interpretation of policies, procedures and union agreements.
- Prepare written reports and correspondences, and presentations to senior leadership as required.
- Prioritize and organization multiple activities for self and staff.
- Project consequences and financial costs of proposed actions, and make and supporting recommendations and positions.
- Speak clearly and communicate messages to appropriate individuals.
- Speak to groups.
- Work under deadlines, urgent situations and emotional/confrontational situations that require instructing, persuading and motivating people.



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with "X"-				
Sedentary	Light	Medium	Heavy	Very Heavy
Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.	Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.	Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.	Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly.	Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

PHYSICAL DEMANDS:

C	F	O	R	N
Continuously 2/3 or more of the time.	Frequently From 1/3 to 2/3 of the time.	Occasionally Up to 1/3 of the time.	Rarely Less than 1 hour per week.	Never Never occurs.

Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

-Physical Demand-	-Frequency-	-Brief Description-
Standing	O	Making presentations; observing work site; observing work duties; Communicating with co-workers
Sitting	C	Desk work; meetings; driving
Walking	F	To other departments/offices; around work site
Lifting	O	Supplies; equipment; files
Carrying	O	Supplies; equipment; files
Pushing/Pulling	O	File drawers; equipment; tables and chairs
Reaching	F	For supplies; for files
Handling	C	Paperwork
Fine Dexterity	C	Computer keyboard; telephone keypad; calculator
Kneeling	O	Filing in lower drawers; retrieving items from lower shelves/ground
Crouching	O	Filing in lower drawers; retrieving items from lower shelves/ground
Crawling	R	Under equipment
Bending	O	Filing in lower drawers; retrieving items from lower shelves/ground; making repairs
Twisting	F	From computer to telephone; getting inside vehicle
Climbing	O	Stairs; Step stools
Balancing	R	On step stools
Vision	C	Reading; computer screen; driving; observing work site
Hearing	C	Communicating via telephone/radio to co-workers/public; listening to equipment
Talking	C	Communicating via telephone/radio to co-workers/public
Foot Controls	O	Driving
Other (specified if applicable)		



MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, fax machine, scanner, copier, personal vehicle, computer and associated hardware and software.

ENVIRONMENTAL FACTORS:

C Continuously	F Frequently	O Occasionally	R Rarely	N Never
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D Daily	W Several Times Per Week	M Several Times Per Month	S Seasonally	N Never
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-Health and Safety Factors-	
Mechanical Hazards	R
Chemical Hazards	N
Electrical Hazards	N
Fire Hazards	N
Explosives	N
Communicable Diseases	R
Physical Danger or Abuse	R
Other (see 1 below)	N

-Environmental Factors-	
Respiratory Hazards	N
Extreme Temperatures	N
Noise and Vibration	N
Wetness/Humidity	N
Physical Hazards	N

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED:

NON-PHYSICAL DEMANDS:

F Frequently From 1/3 to 2/3 of the time	O Occasionally Up to 1/3 of the time	R Rarely Less than 1 hour per week	N Never Never occurs
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-Description of Non-Physical Demands-	-Frequency-
Time Pressure	F
Emergency Situation	R
Frequent Change of Tasks	F
Irregular Work Schedule/Overtime	O
Performing Multiple Tasks Simultaneously	F
Working Closely with Others as Part of a Team	F
Tedious or Exacting Work	F
Noisy/Distracting Environment	R
Other (see 2 below)	N

(2) N/A

PRIMARY WORK LOCATION:

Office Environment	X	Vehicle	
Warehouse		Outdoors	
Shop		Other (see 3 below)	
Recreation/Neighborhood Center			

(3) N/A



The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.

CLASS HISTORY:

Adopted: 06/17
Revised:
Title Change:
Maintenance
Update:
Abolished:
Job Key: TBD