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**Union** Transport Workers Union of America (AFL-CIO)

**Local** Local 200

Occupations Represented
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**Bargaining Agency** City and County of San Francisco

**Agency industrial classification (NAICS):**

92 (Public Administration)

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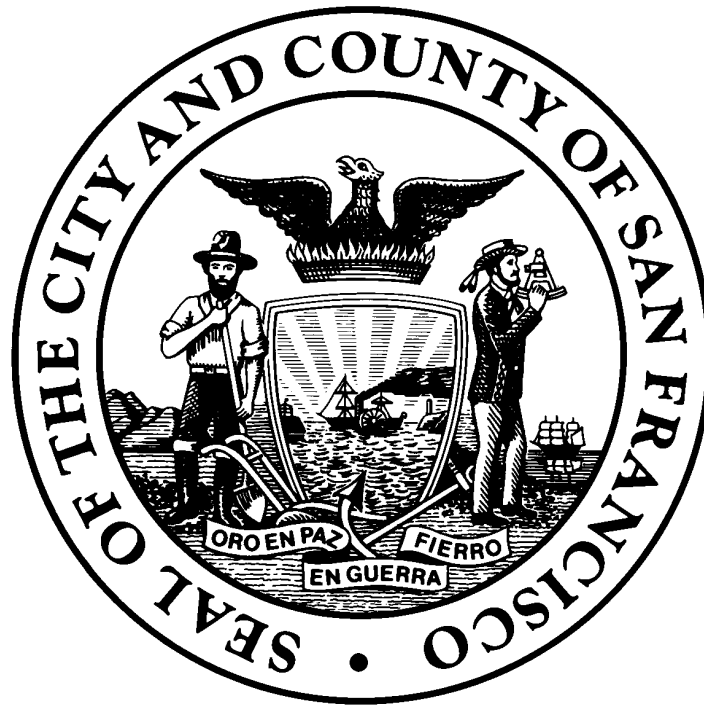
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**Notes**

**Contact**

**Full text contract begins on following page.**

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**COLLECTIVE BARGAINING AGREEMENT**

**BETWEEN**

**THE CITY AND COUNTY OF SAN FRANCISCO**

**AND**

**THE TRANSPORT WORKERS' UNION, AFL-CIO  
LOCAL 200**

**JULY 1, 2001 – JUNE 30, 2003**

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## **PREAMBLE**

1. This Collective Bargaining Agreement (herein referred to as "CBA"), has been developed jointly by the Employee Relations Division, Department of Human Resources under the authority of the Office of the Mayor, the San Francisco Board of Supervisors (hereinafter referred to as "BOARD"), the San Francisco Municipal Railway (herein referred to as "MUNI"), under the authority of the Municipal Transportation Agency (hereinafter referred to as MTA), and the Transport Workers Union of America, AFL-CIO, Local #200 (hereinafter referred to as "LOCAL 200").

## **ARTICLE I - REPRESENTATION**

### **I.A. RECOGNITION**

2. The City acknowledges that LOCAL 200 has been certified as the recognized employee representative pursuant to the provisions of the Employee Relations Ordinance for the following classifications and bargaining units:

- 1773 Media Training Specialist
- 7412 Automotive Service Worker Assistant Supervisor
- 9135 Passenger Service Specialist
- 9139 Transit Supervisor I
- 9140 Transit Manager I
- 9141 Transit Manager II
- 9150 Train Controller
- 9173 Systems Safety Inspector
- 9155 Claims Investigator
- 9156 Senior Claims Investigator
- 9157 Claims Adjuster
- 8121 Fare Inspections Supervisor/Investigator
- 8126 Senior Investigator, Office of Citizen Complaints

3. The terms and provisions of this CBA shall also be automatically applicable to any classification which is accreted to an existing unit covered by this CBA during its term. This Agreement shall not automatically extend to new bargaining units for which LOCAL 200 has gained representation or established a representative status through affiliations or service agreements. Said employees covered by the terms and provisions of this CBA are hereinafter referred to as "EMPLOYEE(S)," singular or plural as the context so indicates.

### **I.B. INTENT**

4. The purpose of this CBA is to meet the foregoing parties' mutual responsibility to provide the public with dependable, prompt, safe, economical and courteous public transportation. The PTC, the Mayor in consultation with the Board of Supervisors, and LOCAL 200 have negotiated this agreement in accordance with Section A8.409, et seq. of the San Francisco City Charter.
5. It is the intent of the parties signatory hereto that the provisions of this CBA, upon ratification by the members of LOCAL 200, shall bind LOCAL 200 and its members.

6. It is the intent of the parties signatory hereto that the provisions of the CBA, upon ratification by the BOARD as to those matters within the BOARD's legal authority, shall bind the agencies of the City and County of San Francisco (hereinafter referred to as "CITY"), including the MTA as to those matters within the MTA's legal authority and any other CITY department ("Department") employing individuals covered by this Agreement.
7. The terms and conditions of employment for EMPLOYEES covered by this CBA shall be governed by the terms and conditions established by CITY Charter provisions, ordinances of the BOARD, relevant rules of the CSC, MTA and MUNI, and by the terms and conditions of employment set forth in this CBA.
8. In the event provisions of this CBA are in conflict with the foregoing authorities, provisions of this CBA shall prevail to the fullest extent legally possible. Unless an existing ordinance, resolution, rule or regulation is specifically discussed and changed, deleted, or modified by the terms of this CBA, said ordinance, resolution, rule or regulation shall be deemed to remain in full effect.
9. **Duty to Meet & Confer.** Pursuant to the provisions of the Meyers-Milias-Brown Act, as amended, the CITY agrees to meet & confer, as required by law with LOCAL 200 in advance regarding any proposed changes in working conditions within the scope of representation including but not limited to the bargainable impacts on EMPLOYEES of: changes in management structure, the process for the fair and equitable selection of training candidates, the scheduling of operations, reorganization plans, the implementation of AVM/ATCS, staffing, the prioritization of work assignments in the face of cutbacks in staffing, changes in overtime recording procedures, the inclusion of 9139 and 9140 in capital projects, the acquisition of VDT equipment and 7412 "set-up work." The CITY shall attempt to provide any proposed changes to LOCAL 200 in writing within fifteen (15) days before said changes are to go into effect (emergencies excepted). Within five (5) days of the receipt of the notice of proposed changes, LOCAL 200 may request, in writing, a meeting and/or present the Department with any comments and suggestions it may have in writing concerning the proposed changes. The Department shall reply, in writing, within ten (10) days by scheduling a meeting, if so requested by LOCAL 200, and by responding to LOCAL 200's written comments.
10. As provided within the Charter, any matter not resolved by the parties through meet & confer during the term of this Agreement may not be submitted to arbitration. However, if the parties are unable to resolve any differences on the aforementioned issues, either party may request that the matter be considered by the Joint Labor Management Board.
11. The Employee Relations Division will be advised of and coordinate, if necessary, all meet & confer and be available to assist so that all provisions in the CBA will be followed.

**I.C. NO STRIKE PROVISION**

12. The Union and each member of the bargaining unit covenant and agree not to initiate, engage in, cause, instigate, encourage or condone a strike, work stoppage, slowdown, or absenteeism. The Union and each member of the bargaining unit covenant and agree not to engage in any form of sympathy strike including, but not limited to, observing or honoring the picket line of any other union or person.

**I.D. OBJECTIVE OF THE CITY**

13. The most efficient, effective and courteous delivery of CITY services is of paramount importance to the CITY and its EMPLOYEES, and is recognized to be a mutual obligation of the parties to this CBA within their respective roles and responsibilities.

**I.E. MANAGEMENT RIGHTS**

14. Except as otherwise provided in this Agreement, in accordance with applicable state laws, nothing herein shall be construed to restrict any legal CITY rights concerning direction of its work force, or consideration of the merits, necessity, or organization of any service or activity provided by the CITY.
15. The CITY shall also have the right to determine the mission of its constituent departments, officers, boards and commissions; set standards of services to be offered to the public, and exercise control and discretion over the CITY's organization and operations. The CITY may also relieve EMPLOYEES from duty due to lack of work or funds, and may determine the methods, means and personnel by which the CITY's operations are to be conducted.
16. It is understood and agreed that except as specifically set forth in this agreement the CITY retains all of its powers and authority to manage municipal services and the work for performing those services.
17. The exercise of these rights shall not be subject to the grievance procedure. However, the exercise of such rights does not preclude EMPLOYEES from utilizing the grievance procedure to process grievances regarding the practical consequence of any such actions on wages, hours, benefits or other terms and conditions of employment specified in this Agreement.

**I.F. STEWARDS**

18. LOCAL 200 may select one steward and/or alternate steward in each department or bureau or facility in which EMPLOYEES covered by this CBA are working. A steward shall only deal with grievances within or related to the steward's department, bureau or facility.
19. LOCAL 200 shall furnish the CITY with an accurate list of shop stewards. LOCAL 200 may submit amendments to this list at any time because of the permanent absence of a designated shop steward. If a shop steward is not officially designated in writing, by Local 200, none will be recognized.
20. LOCAL 200 and the CITY recognize that it is the responsibility of the shop steward to assist in the resolution of grievance or disputes at the lowest possible level.
21. While handling grievances, discipline, or meeting with the CITY representatives concerning matters affecting the working conditions and status of EMPLOYEES covered by this CBA, one shop steward shall be allowed time off during normal working hours to perform such duties without loss of pay; provided, however, that time off for investigation shall be reasonably related to the difficulty of the grievance. No steward shall leave the duty or work station or assignment without specific approval of the EMPLOYEE's department head or other authorized manager. Such release time for the shop steward shall not be unreasonably denied.

22. If, in the judgment of the supervisor, permission cannot be granted immediately to the shop steward to investigate or present a grievance during on duty time, such permission shall be granted by the supervisor no later than the next working day from the date the shop steward was denied permission, unless the parties agree to an alternative time.
23. In handling grievances or disciplinary matters, the shop steward shall have the right to:
24. 1. Consult with the affected EMPLOYEE regarding the presentation of a grievance after the EMPLOYEE has requested the assistance or presence of the shop steward.
25. 2. Present to a supervisor a grievance, which has been requested by an EMPLOYEE or group of EMPLOYEES, for resolution or adjustment.
26. 3. Investigate any such grievance so that such grievance can be properly discussed with the supervisor or the designated representative.
27. 4. Attend meetings with supervisors or other City representatives when such meetings are necessary to adjust grievances or represent EMPLOYEES in disciplinary matters. In scheduling meetings, due consideration shall be given to the operating needs and work schedules of the department, division, or section in which the EMPLOYEES are employed. Release time for the shop steward shall not be unreasonably denied.
28. In emergency situations, where immediate disciplinary action may be taken because of violation of law or a CITY or departmental rule (theft, etc.), the shop steward shall, if possible, be granted immediate permission to leave his/her post of duty to assist the EMPLOYEE.
29. Shop stewards shall not interfere with the work of any employee.
30. Stewards shall receive timely notice of departmental orientation sessions, and shall be permitted to make appearances at departmental orientation sessions, in order to distribute LOCAL 200 materials and to discuss EMPLOYEE rights and obligations under this CBA. LOCAL 200 and the Department may agree to other arrangements for contact between stewards and new EMPLOYEES.
31. EMPLOYEE Representatives. Pursuant to the Meyers-Milias-Brown Act and Employee Relations Ordinance, a reasonable number of stewards or other designated EMPLOYEES may attend during working hours with no loss of pay, meetings scheduled with representatives of the Appointing Officer for the purpose of meeting and conferring on terms and conditions of employment, and may participate in the discussions, deliberations and decisions at such meeting.

## **I.G. GRIEVANCE PROCEDURE & THE DISCIPLINE PROCESS**

32. The following procedures are adopted by the Parties to provide for the orderly and efficient disposition of grievances and are the sole and exclusive procedures for resolving grievances as defined herein. Separate procedures for MTA Service Critical employees shall only apply at Steps 1 and 2 of the Grievance Procedure.



33. 1. Definition. A Grievance shall be defined as any dispute which involves the interpretation or application of, or compliance with this agreement, including discipline and discharge of EMPLOYEES.

Definition and Filing of Grievances for MTA Service Critical Employees:

34. Grievances must be filed in writing on a Union Grievance Form. The grievance will set forth the facts of the grievance, the terms and conditions of the Agreement claimed to have been violated, misapplied or misinterpreted, and the remedy or solution being sought by the grievant. Grievances shall only be filed with the MTA designated officials at Steps 1 and 2, and shall not be accepted by other management representative of MTA. Grievances involving multi-class or multi-mode/division disputes shall be first filed at Step 2.

35. CSC Rule "Carve-outs" are not subject to the grievance procedure nor may be submitted to arbitration.

36. 2. Time Limits. The time limits set forth herein may be extended by agreement of the parties. Any such extension must be for a specifically stated period of time and confirmed in writing. In the event a grievance is not filed or appealed in a timely manner it shall be deemed withdrawn. Failure of the CITY to timely reply shall authorize LOCAL 200 to appeal the grievance to the next step in the Grievance Procedure.

Time Limits for MTA Service Critical Employees:

37. Time limit extensions shall only be granted in exceptional cases, and must be agreed to in writing between the Union President and the MTA Labor Relations Manager. If MTA fails to meet the time limits at any point in Steps 1 and 2, the grievance shall be granted. If the Union fails to meet the time limits at Steps 1 and 2, the grievance will be withdrawn.

38. In MTA grievances involving discipline, the time limits in the grievance procedure shall not be extended due to the absence of the grievant unless the grievant is unable to appear due to a serious, verifiable illness which precludes the grievant from attending a meeting, or is on authorized leave which was approved prior to the proposed discipline.

39. 3. Economic Claims. Any claim for monetary relief shall not extend more than thirty (30) calendar days prior to the filing of a grievance. Though the resolution of disputes outside the Grievance Procedure is desired, it is understood by Local 200 that, in order to preserve its claims for monetary relief, it will file a grievance upon having knowledge of the aggrieved event and, should resolution outside the Grievance Procedure appear probable, request an abeyance of the Grievance Procedure time limits, as set forth in section 2, above. The CITY will not unreasonably refuse a request for abeyance where settlement of an economic claim appears probable.

4. Grievance Initiation.
40. a. A grievance affecting more than one EMPLOYEE shall be filed with the management official having authority over all EMPLOYEES affected by the grievance.
41. b. Only LOCAL 200 shall have the right on behalf of a disciplined or discharged EMPLOYEE to appeal the discipline or discharge action.
42. 5. Steps of the Procedure. An EMPLOYEE shall discuss the grievance informally with his/her immediate supervisor, provided the grievance is not a discrimination or retaliation claim against that supervisor, and try to work out a satisfactory solution in an informal manner as soon as possible, but in no case later than five (5) calendar days from the date of the occurrence of the act or the date the grievant might reasonably have been expected to have learned of the alleged violation being grieved. The grievant may have a LOCAL 200 representative present.
43. a. Step 1 (Intermediate/departmental level). If the grievance is not resolved within seven (7) calendar days after contact with the immediate supervisor, the grievant will submit the grievance in writing to the departmental (intermediate) supervisor no later than twenty-five (25) calendar days after the facts or event giving rise to the grievance. Claims alleging sexual harassment may be filed within four (4) months. The grievance will be submitted on a mutually agreeable grievance form. The grievance will set forth the facts of the grievance, the terms and conditions of this Agreement claimed to have been violated, misapplied or misinterpreted, and the remedy or solution being sought by the grievant.

Filing MTA Grievances at Step 1:

44. Step 1 (Intermediate/departmental level). Step 1 grievances at MTA shall be filed with the 9143 Senior Operations Manager at the Division/Mode where the alleged violation and/or discipline have occurred.
45. The intermediate/departmental supervisor shall respond in writing within seven (7) calendar days following receipt of the written grievance.
46. b. Step 2 (Appointing Officer level). A grievant dissatisfied with the supervisor's response at Step 1 may appeal to the Appointing Officer, or its designee, in writing, within seven (7) calendar days of receipt of the Step 1 answer. The Appointing Officer, or its designee, may convene a meeting within fifteen (15) calendar days with the grievant and the LOCAL 200 representative. The Appointing Officer, or its designee, shall respond in writing within fifteen (15) calendar days of the meeting or receipt of the grievance, whichever is later.

Filing MTA Grievances at Step 2:

47. Step 2 (Appointing Officer Level). Step 2 grievances at MTA shall be filed with the MTA Labor Relations Manager, who shall serve as the Appointing

Officer's designee. The grievance shall contain copies of all earlier correspondence and materials, if any, reviewed at Step 1.

48. c. Step 3 (Employee Relations Division level). A grievant dissatisfied with the Appointing Officer's response at Step 2 may appeal to the Director, Employee Relations, or its designee ("ERD"), in writing, specifying the reason(s) why LOCAL 200 is dissatisfied with the Department's response, within fifteen (15) calendar days of receipt of the Step 2 answer. The grievance shall contain copies of all earlier correspondence and materials reviewed at the earlier steps. ERD may convene a grievance meeting within fifteen (15) calendar days with the grievant, and/or LOCAL 200.
49. 1). Disciplinary Grievances. ERD shall have fifteen (15) calendar days after the receipt of the written grievance or if a meeting is held, fifteen (15) calendar days after the meeting, whichever is later, to review and seek resolution of the grievance and respond in writing.
50. 2). Contract Grievances. ERD shall have thirty (30) calendar days after the receipt of the written grievance, or if a meeting is held, thirty (30) calendar days after the meeting, whichever is later, to review and seek resolution of the grievance and respond in writing.
51. 6. Arbitration (Step 4). If LOCAL 200 is dissatisfied with the Step 3 response it may appeal by notifying ERD, in writing, within thirty (30) calendar days of its receipt of the Step 3 response that arbitration is being invoked.
52. 7. Expedited Arbitration. Suspensions of fifteen (15) days or less shall be processed through an Expedited Arbitration proceeding. By written mutual agreement entered into before or during Step 3 of the Grievance Procedure, the parties may submit other grievances to the Expedited Arbitration process.
53. a. Scheduling. ERD will reserve at least one day each month for grievances to be heard at Expedited Arbitration. Grievances will be scheduled for Expedited Arbitration on a first-come-first-served basis, with ERD having the authority to reschedule grievances or add additional Expedited Arbitration dates, as it deems necessary. Under no instance shall either Local 200 or the CITY (and its Departments) have less than seven (7) days advance notice prior to the scheduling of an Expedited Arbitration, unless mutually agreed by the parties in writing. ERD will provide Local 200 with the schedule of Expedited Arbitration dates upon request.
54. b. Selection of the Arbitrator for Expedited Arbitration. The parties will first attempt to mutually agree on an arbitrator within seven (7) days of the invocation of Expedited Arbitration. If the parties are unable to agree on a selection within the seven (7) days, either party may request a list of seven (7) appropriately experienced arbitrators from the American Arbitration Association ("AAA"). As a condition of appointment to the AAA's panel, each of the panelists must certify that (s)he will be available to hear the Expedited Arbitration in not greater than thirty (30) days from her/his selection.

55. The parties will alternately strike panelists until a single name remains. Should the remaining panelist be unable to preside over the Expedited Arbitration within thirty (30) days, the last name stricken from the panel will be contacted, and continuing, if necessary, in reverse order of the names being stricken, until a panelist is selected who can preside over the Expedited Arbitration within thirty (30) days. Whether Local 200 or CITY strikes the first name in the alternating process shall be determined by lot.
56. c. Proceeding. No briefs will be used in Expedited Arbitration. Testimony and evidence will be limited consistent with the expedited format, as deemed appropriate by the arbitrator. There will be no court reporter or transcription of the proceeding, unless either party or the arbitrator requests one. At the conclusion of the Expedited Arbitration, the arbitrator will make a bench decision. Every effort shall be made to have a bench decision followed by a written decision. Expedited arbitration decisions will be non-precedential except in future issues regarding the same EMPLOYEE.
57. d. Costs. Each party shall bear its own expenses in connection with the presentation of its case. All fees and expenses of the arbitrator shall be borne and shared equally by the parties. The costs of a court reporter and the transcription of the proceeding, if any, shall be paid by the party requesting such, unless requested by the arbitrator, which will then be borne and equally shared by the parties. In the event that an Expedited Arbitration hearing is canceled resulting in a cancellation fee, the party initiating the request or causing the cancellation shall bear the full cost of the cancellation fee, unless the parties agree otherwise.
58. 8. Arbitration Procedure (not Expedited Arbitration).
59. a. Selection of an Arbitrator. On an annual basis, the parties shall establish a list of seven (7) arbitrators to serve as the permanent panel to hear grievances arising under the terms of this Agreement. In the event the parties cannot agree on the panel within thirty (30) days following the effective date of this Agreement, either party may obtain a panel through the appointment process of the AAA. Any name provided by the AAA may be removed from the panel by mutual consent of the parties. The AAA will appoint a replacement for any name removed, unless the parties mutually agree on a replacement panelist.
60. When a matter is appealed to arbitration the parties shall first attempt to mutually agree on an arbitrator. In the event no agreement is reached within ten (10) calendar days, the arbitrator shall be selected from the permanent panel in accordance with the following procedure:
61. 1). Panelists shall be listed in alphabetical order. The case shall be assigned to the next panelist in order, provided however that each party shall be entitled to one strike.
62. 2). The panelist next in order following any strike options exercised by the parties shall be designated to hear the case.

63. 3). In the event that either party strikes a panelist's name from the list in accordance with this section, the struck panelist's name shall be placed at the bottom of the list. Once struck, the same party may not strike that panelist's name again until that panelist has been selected to preside over an arbitration.
64. b. Authority of the Arbitrator (both regular and expedited). The decision of the arbitrator shall be final and binding, unless challenged under applicable law. The arbitrator shall have no authority to add to, ignore, modify or amend the terms of this Agreement.
65. c. Costs of Arbitration. The direct expenses of the arbitration including the fees and expenses of the arbitrator shall be borne and shared equally by the parties. The costs of a court reporter and the transcription of the proceeding, if any, shall be paid by the party requesting such, unless requested by the arbitrator, which will then be borne and equally shared by the parties. In the event that an arbitration is canceled resulting in a cancellation fee, the party initiating the request or causing the cancellation shall bear the full cost of the cancellation fee, unless the parties agree otherwise, which shall not be unreasonably withheld.
66. d. Hearing Dates and Date of Award. Except for the Expedited Arbitration procedure described above, hearing dates shall be scheduled within thirty (30) working days of selection of an arbitrator or on the next practicable date mutually agreeable to the parties. Awards shall be due, in writing, within forty-five (45) calendar days following the receipt of closing arguments. As a condition of appointment to the permanent panel, arbitrators shall be advised of this requirement and shall certify their willingness to abide by these time limits.
67. 9. The Discipline Process. The CITY shall have the right to discipline any non-probationary permanent EMPLOYEE, temporary civil service EMPLOYEE, or provisional EMPLOYEE upon completion of twelve (12)-months service, for just cause.
68. As used herein "discipline" shall be defined as written reprimands, written warnings, discharge, suspensions and disciplinary demotion. A change of work assignment, either to or from a particular assignment, may not be made solely for disciplinary purposes.
69. Any LOCAL 200 EMPLOYEE assigning a classification 9163 Transit Operator to perform the work of a 9139 Transit Supervisor shall be subject to disciplinary action, except as provided under Article II.C.17., herein.
70. EMPLOYEES who are released or disciplined during their initial probationary period or during any probationary period established by this CBA, may appeal the release or discipline provided that the grounds for the grievance or appeal shall be limited to a claimed violation of Article II.A. In such an appeal the EMPLOYEE shall bear the burden of proof with respect to the claimed violation.
71. No interview of an EMPLOYEE that may result in disciplinary action or at which discipline is to be imposed will be undertaken unless the EMPLOYEE is first

advised of his/her right to representation. If requested by the EMPLOYEE, such representation must be secured within the succeeding twenty-four (24) hour period, excluding holidays and weekends. If the EMPLOYEE does not secure representation within such period, the right is waived.

72. Written reprimands, written warnings, suspensions, disciplinary demotions and discharges of non-probationary permanent EMPLOYEES, temporary civil service EMPLOYEES, or provisional EMPLOYEES with twelve (12)-months service, shall be subject to the following procedure:
73. a. The basis of any proposed discipline shall be communicated in writing to the EMPLOYEE and to LOCAL 200 no later than eighteen (18) calendar days after management has attained findings on the event or occurrence which is the basis of the discipline, or the offense will be deemed waived.
74. b. Except in emergency situations, where immediate disciplinary action must be taken because of a violation of law or a CITY or department rule (theft, *etc.*), no disciplinary action can be taken without first providing the EMPLOYEE and LOCAL 200 with the written charges and the materials upon which the charges are based.
75. c. The EMPLOYEE and her/his representative shall be afforded a reasonable amount of time to respond, either orally at a meeting (“Skelly hearing”), or in writing, to the management official designated by the CITY to consider the reply. Should the EMPLOYEE and her/his representative elect to respond orally at a Skelly hearing, the Department will notify the parties, in writing, at least five (5) days in advance of the meeting, unless mutually agreed otherwise by the parties. LOCAL 200 shall have the right to be present at the Skelly hearing. The EMPLOYEE and her/his representative may present any relevant oral/written testimony and other supporting documentation as part of her/his response.
76. Individuals who may have direct knowledge of the circumstances relating to the discipline may be present at the request of either party at the hearing. In the case of CITY employees giving relevant oral testimony, they shall be compensated at an appropriate rate of pay for time spent.
77. d. The EMPLOYEE shall be notified in writing of the decision based upon the information contained in the written notification, the EMPLOYEE's statements, and any further investigation occasioned by the EMPLOYEE's statements. The EMPLOYEE's representative shall receive a copy of this decision.
78. e. Progressive Discipline: For most offenses, management is expected to use a system or progressive discipline under which the EMPLOYEE is given increasingly more severe discipline each time an offense is committed. Management is not bound by progressive discipline in cases of serious offenses where no specific warning or prior disciplinary action need precede

separation for cause. A common pattern may include oral warning, written warning, suspension, and finally, separation for cause.

#### **I.H. DUES DEDUCTION**

79. Payroll deductions from the pay of EMPLOYEE(s) covered by this CBA for dues to be paid to LOCAL 200 shall be made by the Controller in accordance with the Controller's regulations and the provisions of San Francisco Administrative Code Section 16.90 et seq. (Article V). The CITY agrees to transmit said funds to LOCAL 200 once monthly to LOCAL 200 headquarters. The CITY further agrees that it will check off and transmit to Local 200 Special Fund the amount specified monthly from the wages of those EMPLOYEE(s) who voluntarily authorize such contributions on the forms provided for that purpose by said fund. These transmittals shall occur monthly and shall be accompanied by a list of the EMPLOYEE(s) from whom such deductions have been made and the amounts deducted.

#### **I.I. GENERAL INFORMATION**

80. As provided under Article III.D.4., the Department shall maintain all records of overtime worked by EMPLOYEE(s) in their respective divisions/departments. Copies of said records shall be made available to the representative of LOCAL 200 upon request.
81. Notice of Occurrence of Industrial Accidents. Timely notice of the occurrence of an injury to any EMPLOYEE sustained in the course of his or her employment shall be given to LOCAL 200. Information supplied may include the date of the accident or injury, corrective action taken, current status of EMPLOYEE, and the work location of the accident or injury. When an EMPLOYEE is hospitalized, LOCAL 200 will be notified by telephone.

## ARTICLE II - EMPLOYMENT CONDITIONS

### II.A. NON DISCRIMINATION

82. The CITY and LOCAL 200 agree that this Agreement shall be administered in a nondiscriminatory manner. Specifically, no person covered by this Agreement shall be discriminated against because of race, color, creed, religion, sex, sexual orientation, gender identity, national origin, physical or mental disability, age, political affiliation or opinion or LOCAL 200 membership or activity. Discrimination as used herein shall mean discrimination as defined by Title VII of the 1964 Civil Rights Act, as amended, the Civil Rights Act of 1991, the California Fair Employment and Housing Act, the Americans with Disabilities Act, the California and United States Constitutions, the Equal Pay Act of 1963, the Age Discrimination in Employment Act of 1967, the Civil Rights Act of 1866, Meyers-Milias-Brown Act and any other laws and regulation relating to employment discrimination.
83. A complaint of discrimination may, at the employee's option, be processed through the City's Equal Employment Opportunity complaint process, or federal or state administrative or judicial processes. If the employee elects to pursue a non-contractual remedy for discrimination, it shall constitute a waiver of the right to pursue that complaint through the grievance and arbitration procedure.

### II.B. AMERICANS WITH DISABILITIES ACT

84. The parties agree that they are required to provide reasonable accommodations for persons with disabilities in order to comply with the provisions of the Americans with Disabilities Act, the Fair Employment and Housing Act, and all other applicable federal, state and local disability anti-discrimination statutes and further agree that this agreement will not be interpreted, administered or applied in any manner which is inconsistent with said Act. The CITY reserves the right to take any action necessary to comply therewith.

### II.C. ASSIGNMENT OF WORK

85. 1. The purpose of the Sign-Ups here provided is to allow for a fair and equitable procedure for lateral movement for EMPLOYEES in the 9139 classification.
2. Polling and General Sign-Up (Classification 9139).
86. Polling:
- Vacancies in Streets and Metro Rail Operations (MRO) will be filled through current procedures.
  - Vacancies in Scheduling, Safety & Training, Central Control, Station Operations and Dispatch will be filled through polling the following four (4) divisions: Streets, MRO, Station Operations and Dispatch.
  - An employee who moves as a result of polling may not move again until the General Sign Up.
87. General Sign Up (GSU):
- General Sign-Up (Classification 9139): There shall be a general sign-up within the 9139 classification once every three (3) years with the exception of persons



assigned to the Schedule Department, Safety and Training, and Central Control. Movement among divisions as a result of the general sign up will be phased in over a one-year period.

- The above listed divisions/groups [Schedule Department, Safety and Training, and Central Control] shall be limited to a turnover of fifty percent (50%). Personnel desiring to leave these divisions/groups shall be allowed to do so in direct seniority order subject to the fifty percent (50%) turnover rule. Movement as a result of polling in the period between General Sign Ups will be considered as part of the 50% limitation at the time of the GSU.

88. 3. Sign-up Procedures and Shift Determination. The parties will meet & confer on an expedited basis, regarding each General Sign-Up, including job descriptions, designation and description of shifts, and the rules and procedures for the General Sign-Up. At least twenty-five (25) calendar days prior to the scheduled date for the sign-up, MUNI shall provide LOCAL 200 with a written summary of any changes planned by management. The parties shall begin the formal meet & confer process not less than twenty (20) days prior to the scheduled date for the General Sign-Up. Sign-ups will not be posted until after the meet & confer process is completed.
89. 4. Posted Shifts. All shifts will be posted at least ten (10) days prior to the sign-up. At the same time, duties and responsibilities related to the Shifts will be posted along with the Shifts to which they refer.
90. 5. Shift Premiums. Those Shifts which have pay premiums shall be so marked.
91. 6. Sign-up for Shifts. Sign-up for a Shift shall be in direct seniority order as defined in Article II.H, except as to agreed upon exceptions that have previously been met and conferred on.
92. 7. General Sign-up Procedures. Each EMPLOYEE shall have five (5) minutes to sign-up. If an EMPLOYEE will not be present, she or he can leave five (5) choices of assignment on the prescribed form or designate in writing a LOCAL 200 representative to bid for her/him. If no choices have been made known, the following procedures will govern assignments:
93. a. The EMPLOYEE will be assigned to the same position as occupied before the sign-up if that Shift is still open.
94. b. The EMPLOYEE will be assigned the most similar available position in the same group or division with similar hours and days off.
95. c. The EMPLOYEE will be assigned to another group or division with similar hours and days off.
96. d. The EMPLOYEE will be assigned to the group or division where now working but to a shift with different hours and/or days off.

97. e. The EMPLOYEE will be assigned by Management to any open position, preferably with similar type of equipment (surface, rail, etc.).
98. 8. On Leave and Scheduled to Sign Up. EMPLOYEES on personal leave, sick leave (including industrial), or special duty, who are scheduled to return to work on or before thirty (30) days following the date of the sign-up will be allowed to take part. EMPLOYEES who are currently on leave must present a doctor's note of the projected date of return to work in person to the Appointing Officer or its designee within five (5) working days of the posting of the sign-up. Management will notify by mail all EMPLOYEES entitled to take part who are off on extended leaves of absence. EMPLOYEES on leave who are not scheduled to return to duty within the prescribed time may not participate in the sign-up. When such individuals return to work, they will be assigned to an open position in any group or division, with preference given to seniority and to the same or like position from which they came.
99. 9. Changing Assignments. EMPLOYEES changing work assignments to another group or division and who require it will be trained in required aspects of the work of the new group or division.
100. 10. Accepted Performance Levels. An EMPLOYEE who has signed up for a changed work assignment in another group or division and does not meet accepted performance levels within three (3) months, but has worked satisfactorily in another previously assigned worksite, may be allowed to return to the previously assigned work group or division.
101. 11. Group Sign-up (9139). There shall be a group sign-up once each year unless legitimate operational concerns require postponement of up to three (3) months. The group sign-up shall include the total number of 9139 positions for each group and will allow changes in shift hours, locations, and five day work assignments. Ten (10) days prior to posting, LOCAL 200 will be given notice of any changes proposed and given an opportunity to discuss the changes. Proposed changes in duties and responsibilities and substantial changes in the proportion of shifts with weekend and night working shall be subject to the formal meet & confer process.
102. 12. Medical transfers. The EMPLOYEE will provide the necessary documentation to the Department verifying the extent of the medical problem, the work limitations, and the expected duration of the disability. The EMPLOYEE may take a medical transfer to the new group or division going to the bottom of the Board until the next group sign-up.
103. 13. Waiting List between Sign-Ups. At the time of a general Sign-Up, a waiting list shall be established in seniority order for the Training and Schedules Departments. The list shall be used to fill vacancies in these departments occurring between Sign-Ups.
104. 14. Relief Assignments. Relief assignments shall be filled as they become available by the most senior EMPLOYEE in the classification within the group on the departmental Vacation Relief list requesting the reassignment, consistent with the terms of Article II.H. EMPLOYEES in relief assignments shall be offered, by

seniority order, the reassignment to any permanent opening as it becomes available, providing the Department elects to fill the opening.

105. a. On Wednesday of each week, the shifts requiring relief assignments lasting at least one week starting the following week will be posted for sign-up from among those who have bid for relief positions. Such individual signing up for a shift shall maintain his/her bid for days off.
106. b. When, in the opinion of the Appointing Officer or its designee, exceptional circumstances require that the most senior person who bid for a particular shift is not allowed to cover that shift, the Appointing Officer or its designee shall inform Local 200, and at the request of Local 200, an immediate meeting will be held to review the reasons why the most senior person is not allowed to work the shift.
107. c. Reassignment to a permanent opening occurring between sign-ups will be offered, should the Department choose to fill the position, to those EMPLOYEES within the classification in the group on the relief assignment list in seniority order.
108. 15. Minimum Break between Relief Shifts and Block Shifts. The Department and LOCAL 200 agree that changing work hours from day to night work during the course of a work week can affect the health and safety of EMPLOYEES and should be minimized to the extent possible. Except in emergencies, the Department shall make a best effort to arrange breaks of not less than nine (9) hours between the end of an assigned shift and the beginning of the next assigned shift within each week of five (5) consecutive work days.
109. 16. Short Term Reassignments for classifications 9139 and 9140. Short term temporary or emergency reassignments within a classification or to another classification necessary to maximize public service may not exceed 100 calendar days. The selection of EMPLOYEES for such reassignments shall be by seniority, provided the EMPLOYEE has the capacity to perform in that assignment., or can be trained for such assignment in fifteen (15) working days or less. In the event the EMPLOYEE is not fully trained within fifteen (15) working days after training has been provided, the Department may reassign the next senior EMPLOYEE.
110. 17. No EMPLOYEE covered by this Agreement may assign classification 9163 Transit Operators to perform the work of classification 9139 Transit Managers, except in emergencies and then only for the duration of such emergency.
111. 18. Assignment of 9140 Transit Manager I. Assignment of EMPLOYEES in classification 9140 to particular work duties and/or shifts shall be made by the Appointing Officer or its designee based on the skills, experience, good interpersonal relations and work record of each individual. Seniority shall control the assignment, however seniority shall not control the assignment, or be the single determining factor, if the skills, types of experience, good interpersonal relations and work record of the less senior candidate are considerably better suited, based upon these criteria,

to achieve important operational objectives. The Appointing Officer or its designee may reassign persons at any time based on these criteria.

112. Reassignments may also occur as a result of vacancies in the 9140 class. Any 9140 EMPLOYEE interested in an open position shall request in writing that he or she be considered. Such reassignments shall be made within the criteria stated above.
113. 19. Central Control Staffing. Adequate staffing at Central Control on weekends requires a person to work the 10 am to 6 p.m. shift. In the absence of such a person, the Transit Manager I will work the consoles during break schedules.
114. 20. Assignment of 7412 Automotive Service Worker Assistant Supervisor. Automotive Service Worker Assistant Supervisors may bid for shifts or locations by seniority, including newly created or vacant positions. When a 7412 fills a position as a result of a bid, he or she may not bid for another position until one year has elapsed, except when the Department, at its discretion, decides to change a position to another location or shift. A 7412 whose position is changed would have an opportunity to bid into any other 7412 position based upon seniority.
115. 21. As appropriate, and, in the sole discretion of the Appointing Officer or its designee, a 7412 shall be assigned to each shift and shop where five (5) or more 7410's are working.
116. 22. The parties have agreed, in principle, that the Transit Manager II classification is an appropriate classification to manage the divisions. This provision shall not supersede nor is intended to alter the authority of the Civil Service Commission in determining classification issues.

#### **II.D. PERSONNEL FILES AND OTHER PERSONNEL MATTERS**

117. There shall be maintained only one official personnel file for an EMPLOYEE, and the EMPLOYEE shall have access to the file to review the file during normal working hours, upon reasonable request. The personnel files for EMPLOYEES covered by this CBA shall be maintained at the Personnel Office.
118. No material may be entered into the official personnel file without knowledge of the EMPLOYEE and a copy being given to him/her. An EMPLOYEE will have the option to sign, date and attach a response to material entered in his/her personnel file within thirty (30) days of his/her having knowledge of the entry. Discipline involving less than a suspension may not be considered for subsequent disciplinary actions after twelve (12) months. Discipline involving a suspension of five (5)-days or less may not be considered for subsequent disciplinary actions after eighteen (18) months. Discipline involving a suspension of greater than five (5)-days may not be considered for subsequent disciplinary actions after thirty-six (36) months. Discipline resulting from a chemical dependency violation may not be considered for subsequent disciplinary actions after sixty (60) months. Subject to the approval of the Civil Service Commission, the EMPLOYEE may request, in writing, that any disciplinary documents that may no longer be considered, as described above, be removed from his/her personnel file. In addition, this provision shall not apply to

employees disciplined for: misappropriating public funds or property, misusing or destroying public property, using illicit drugs at work or being under the influence of illicit drugs or alcohol at work, mistreating other persons, engaging in acts that would constitute a felony or misdemeanor involving moral turpitude, engaging in acts that present an immediate danger to the public health and safety, or engaging in immoral acts.

119. Standards of Performance. LOCAL 200 recognizes the CITY's right to establish and/or revise performance levels, norms, or standards. Such standards, developed by usual work measurement procedures, may be used to determine acceptable performance levels, prepare work schedules, and to measure the performance of each EMPLOYEE or group of EMPLOYEES.
120. EMPLOYEE(s) who work at less than acceptable levels of performance may be subject to disciplinary measures.
121. Consistent with the Meyers-Milias-Brown Act and Article I.B., herein, the CITY agrees to meet & confer with LOCAL 200 to discuss the effect of an implementation of revised performance levels, norms or standards. However, EMPLOYEE performance evaluations may not be grieved or submitted to arbitration.

#### **II.E. PERSONAL SERVICES CONTRACT**

122. Personal Services Contracts. No personal service contracts shall be approved by the CITY for work which normally is, or which can be, performed by EMPLOYEES or eligibles for Civil Service classifications covered by this CBA without first meeting and conferring with LOCAL 200, consistent with Article I.B. herein, and subject to approval of the Civil Service Commission.

#### **II.F. EDUCATION AND CAREER DEVELOPMENT**

123. Equal Access to Training Opportunities. Other than training required by management, access to training opportunities shall be provided equitably to all EMPLOYEES who indicate their willingness to participate in such training. As provided under Article I.B., the Appointing Officer, or its designee, and LOCAL 200's representatives will meet & confer to develop the process for the fair and equitable selection of training candidates.
124. Notice of Training Opportunities. The Appointing Officer, or its designee, shall post announcements of all training opportunities affecting positions within LOCAL 200's jurisdiction in a mutually agreeable, accessible location.
125. Review of Training and Promotional Opportunities. Any EMPLOYEE(s), with the assistance of LOCAL 200, may discuss the issue of training opportunities and future potential promotion with the appropriate representative of the Department.
126. EEO Training. The Department will offer training to managers and supervisors in the area of equal employment opportunity and discrimination.

127. MTA Employees shall be offered a minimum of twenty (20) hours of job related training each year. Training will be at the discretion of the Appointing Officer.

## **II.G. JOINT COMMITTEES**

128. Both Union and management agree that effective communications and collaborative problem-solving is conducive to creating and maintaining a positive work environment. This in turn enhances employee morale, increases productivity and improves customer service. The parties agree to establish a new executive level Joint Labor Management Board ("JLMB"). The JLMB shall consist of an equal number of Union and management representatives to be determined by the parties, including the General Manager of MUNI and the President of LOCAL 200. The purpose of the JLMB shall be to provide the parties with a forum for discussion of important non-contractual matters of mutual concern including: formulation of major management policies that affect the LOCAL 200 membership, the effects of budgetary reductions on the Department system, major restructurings of the Department, EMPLOYEE training and education, establishment of new civil service classifications, health and safety issues, and unresolved issues from the Operations Department Union/Management Meetings (UMM) forum. The JLMB will be charged with acknowledging the topics of concern as enumerated in Article IV.A., herein. The JLMB shall jointly plan and recommend programs and/or solutions to problems in these areas. The JLMB shall meet at least quarterly, or on the call of either party. Matters presented to the JLMB may not be grieved or submitted to arbitration, except as provided by law. Disciplinary grievances and matters involving the claims of individual EMPLOYEES shall not be presented to the JLMB. However, the consideration of an issue by the JLMB shall not preclude an EMPLOYEE from pursuing a grievance relating to such issue regarding any action by management that otherwise constitutes a violation of this CBA. Matters that appear on the agenda and are not resolved after two (2) consecutive meetings shall be dropped from the JLMB, unless continued by mutual agreement.

### MTA Operations Department Union/Management Meetings (UMM):

129. Both Union and management agree that problems should be resolved expeditiously and at the lowest possible administrative level. The parties agree to establish an Operations Department Union/Management Meeting to address unresolved, non-contractual issues affecting employees represented by the Union. This UMM forum shall consist of an equal number of Union and management representatives to be determined by the parties. Representatives from other departments may be requested to attend the UMM regarding matters on the agenda which are relevant to their functions. The UMM shall occur monthly. Matters presented to the UMM may not be grieved or submitted to arbitration, except as provided by law. Disciplinary grievances and matters involving the claims of individual employees shall not be presented to the UMM. However, the consideration of an issue by the UMM shall not preclude an employee from pursuing a grievance relating to such issue regarding any action by management that otherwise constitutes a violation of this CBA. Matters which appear on the agenda and are not resolved after two (2) consecutive meetings shall be dropped, or forwarded to the JLMB for consideration, unless continued by mutual agreement.

## **II.H. SENIORITY**

130. Seniority, for the purpose of this Article, is defined as the length of continuous service determined from the day of certification to a permanent position in a classification as described in Article I.A.
131. For classifications 9139 and 7412, seniority shall control in the filling of vacancies within a classification by reassignment and the assignment of shifts, days off and overtime. For classification 9140, seniority shall control unless the skills, types of experience, good interpersonal relations and work record of a less senior candidate are considerably better suited to achieve important operational objectives (see Article II.C.18.).
132. EMPLOYEES covered by this CBA permanently promoted to another classification or receiving any non-permanent appointment may retain their seniority in their original classification in case of return to that position within one (1) year. After one year, promoted employees returning to their original classification shall return to the level of seniority reached at the time of their promotion.
133. Seniority for the purposes of vacation sign-ups shall be computed on the basis of the date of hire with the CITY and County of San Francisco. Where there are more than one EMPLOYEE with the same date of hire, the date of hire in the classification and the position on the Civil Service list shall determine the order for sign-up.

## **II.I. PROBATIONARY PERIOD**

134. The probationary period shall be one year, as defined and administered by the Civil Service Commission.

## **II.J. ANTI-NEPOTISM**

135. No employee of the Municipal Transportation Agency shall knowingly sign up or bid for an assignment that reports directly to or directly supervises the employee's spouse, domestic partner, parent or child. MTA management shall not knowingly assign an employee to such a position. If an employee is in such a position on July 1, 2001, or, if changes occur that cause an employee to be in such a position during the term of this Agreement (including but not limited to organizational restructuring, changes in familial relationships, or changes in reporting relationships caused by operation of the Civil Service rules), the following shall occur: the first represented employee of the two affected employees who has an opportunity to sign up, bid for, or be assigned to a different assignment for which he or she possesses the appropriate qualifications shall be required to do so. This provision is not intended to affect the rights of any employee under the Civil Service rules.

## ARTICLE III - PAY, HOURS AND BENEFITS

### III.A. WAGES

136. Base wages shall be increased as follows:

For all classes in the bargaining unit except Class 9139 a wage increase of 5% per year as follows:

Effective	7/01/01	3.0%
Effective	1/05/02	2.0%
Effective	7/01/02	2.5%
Effective	1/04/03	2.5%

For Class 9139:

Effective	7/01/01	5.5%
Effective	7/01/02	4.5%

#### Internal Adjustments

137. Effective July 1, 2001, wage adjustments will be made to the listed classes as follows:

Class 7412	1.5%	effective 7/01/01
Class 8126	2.5%	effective 7/01/01
Class 9141	2.5%	effective 7/01/01
Class 9173	0.5%	effective 7/01/01

138. Effective July 1, 2002, wage adjustments will be made to the listed classes as follows:

Class 7412	1.5%	effective 7/01/02
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139. All base wage increases shall be rounded to the nearest salary grade. Wage rates are set forth in Attachment A.

### III.B. COMPENSATION FOR VARIOUS WORK SCHEDULES

140. 1. Normal Work Schedule. The normal work day is a tour of eight (8) hours to be completed in nine (9) hours. The normal work week is a tour of duty on each of five (5) consecutive days.

141. 2. Any EMPLOYEE(s) may choose to work a daily shift, where such a shift may be offered, consisting of not more than ten (10) hours. Said EMPLOYEE(s) must then have a tour of duty consisting of four (4) consecutive days of work and three (3) consecutive days off. Overtime shall be paid for all work in excess of ten (10) hours daily and/or forty (40) hours weekly.

142. 3. Compensation fixed herein on a per diem basis are for a normal eight hour work day; and on a bi-weekly basis for a bi-weekly payroll period of service consisting of a normal work schedule.

143. 4. For the purpose of computing hours of work, work time will include: (1) all regularly scheduled work required by the job; (2) in addition to (1), above, all work performed at the request of the EMPLOYEE(s)' supervisor or manager; (3) time



spent by designated representatives of LOCAL 200 in meetings pursuant to Employee Relations Ordinance Section 16.219; (4) time spent by a designated representative of LOCAL 200 representing EMPLOYEE(s) covered by this CBA in the grievance procedure; (5) time spent in court appearances while conducting business related to the Department; (6) time spent on jury duty.

144. 5. An EMPLOYEE who is required to serve on a jury or report to Court for jury duty on her/his regular day off shall be considered to have the following Saturday as an assigned day off if the regular day off lost was Monday or Tuesday, and shall be considered to have Sunday as an assigned day off if the regular day off lost was Wednesday, Thursday or Friday.
145. 6. Statutory holidays shall be counted as hours actually worked.
146. 7. All compensation shall be calculated upon the hours actually worked proportionate to the compensation for a normal work schedule.
147. 8. Fulltime MTA employees on approved sick pay, vacation or compensatory time off shall be given the option of receiving either eight (8) hours pay or an amount equivalent to their regularly scheduled shift hours, from their sick or vacation credits or compensatory time earned balances.

### **III.C. ADDITIONAL COMPENSATION**

148. The CITY and LOCAL 200 agree that the following rates of premium pay shall apply to those positions agreed by the parties to be eligible for premium pay. All premium pay shall be for hours actually worked. Premiums shall be calculated against the EMPLOYEE's base rate of pay and may not be pyramided.

#### 1. NIGHT DUTY

149. EMPLOYEES shall be paid eight and one-half percent (8.5%) more than the base rate for each hour actually worked between 5:00 p.m. and 12:00 a.m. (swing), except for those EMPLOYEES working a normal shift in excess of eight (8) hours per day that requires work between the hours of 5:00 p.m. and 12:00 a.m. Employees working more than five (5) hours of their regular shift between 5:00 p.m. and 12:00 a.m. shall receive the 8.5% differential for the entire shift. Night shift premium shall be paid only for days and hours actually worked, as set forth above, except for statutory holidays and vacation days.
150. EMPLOYEES shall be paid ten percent (10%) more than the base rate for each hour actually worked between 12:00 a.m. and 7:00 a.m. (graveyard), except for those EMPLOYEES working a normal shift in excess of eight (8) hours per day that requires work between the hours of 12:00 a.m. and 7:00 a.m. Employees working more than five (5) hours of their regular shift between 12:00 a.m. and 7:00 a.m. shall receive the 10% differential for the entire shift. Night shift premium shall be paid only for days and hours actually worked, as set forth above, except for statutory holidays and vacation days.

## 2. STANDBY PAY AND PAGER PAY

151. EMPLOYEES who, as part of the duties of their positions are required by the Appointing Officer to stand by when normally off duty to be instantly available on call for immediate emergency service for the performance of their regular duties, shall be paid twenty-five (25%) percent of their regular straight time rate of pay for the period of such standby service, except that EMPLOYEES shall be paid ten (10%) percent of their regular straight time rate of pay for the period of such standby service when outfitted by the Department with an electronic paging device. When such EMPLOYEES are called on to perform their regular duties in emergencies during the period of such standby service, they shall be paid while engaged in such emergency service the usual rate of pay for such service as provided herein. Notwithstanding the general provisions of this section, standby pay shall not be allowed in classes whose duties are primarily administrative in nature.
152. EMPLOYEES in classification 9155 shall receive twenty-five (25%) percent of their regular straight time rate of pay for standby service whether or not they are outfitted by the Department with an electronic paging devices.
153. No EMPLOYEE shall be compensated for standby service unless the Appointing Officer or its designee assigns said EMPLOYEE to such standby service.

## 3. SPECIAL SKILLS / DUTIES

154. a. Central Control Pay. After certification, all EMPLOYEES working in Central Control shall receive an increase of one-half step on the salary grade (2.5%).
155. b. Safety and Training and Scheduling Pay. EMPLOYEES in classification 9139 assigned to the Safety and Training Department and Scheduling Department shall receive a training premium of One Dollar and Fifty cents (\$1.50) per hour but such premium shall be payable only for days and hours actually worked.
156. c. Saturday and Sunday Premium for Class 7412 Automotive Service Worker Assistant Supervisors. When Saturday is worked as part of the scheduled forty (40) hour work week, it shall be paid at the straight time rate, with an additional premium of six percent (6%) of the base rate. When Sunday is worked as part of the scheduled forty (40) hour work week, it shall be paid at the straight time rate, with an additional premium of ninety-four percent (94%) of one-half (1/2) of the base rate.

## 4. LEAD PERSON PAY

157. EMPLOYEES occupying positions designated by the Appointing Officer, or its designee, as a lead person position shall receive a Lead Person premium of One dollar and Fifty cents (\$1.50) per hour, payable only for days and/or hours actually worked.

## 5. SHIFT DIFFERENTIAL (For Class 7412 only)

158. For any shift immediately following a regular day shift or commencing during any period of a day shift shall be considered a night shift and employees working on such shift shall be paid ten percent (10%) above the regular day shift as set forth herein. A subsequent shift shall be known as a midnight shift and shall be paid fifteen percent (15%) above the regular

day rate. Night and midnight Shift Differential premiums shall be paid only for days and hours actually worked except for statutory holidays and vacation days.

6. BILINGUAL PAY

159. EMPLOYEES who are assigned by their Department to a "designated bilingual position" for ten (10) or more hours biweekly shall be granted additional compensation of \$35.00 biweekly. Any EMPLOYEE assigned to a "designated bilingual position" who translates forty (40) or more hours biweekly shall be granted an additional \$15.00 biweekly, making a total of \$50.00 biweekly. A "designated bilingual position" is a position designated by the Department which requires translating to and from a foreign language including sign language used by the hearing impaired and Braille for the visually impaired.

7. AUTOMOBILE ALLOWANCE AND TRANSPORTATION

160. EMPLOYEES at the Municipal Transportation Agency (MTA) who are required in writing to use their personal vehicle for city business (including EMPLOYEES who have received written authorization to utilize their personal vehicle as a street corner shelter) and who receive parking tickets for overtime parking at parking meters when they are unable to place money in the parking meters while on duty in the field shall be reimbursed for no more than three (3) parking tickets per covered EMPLOYEE per fiscal year of this agreement. EMPLOYEES requesting reimbursement shall be required to submit documentation in a form designated by Department management demonstrating that: (1) the citation was issued for overtime parking at a parking meter; (2) the citation was issued at a time and location when the EMPLOYEE was acting in the course and scope of his/her employment in the field; (3) the reason why the EMPLOYEE was precluded by his/her job duties from putting change into the meter in a timely manner.
161. EMPLOYEES required to use their own vehicles for CITY Business shall be reimbursed for mileage at the rate allowed by the IRS during the term of this CBA.

Driver's License Reimbursement

162. MTA employees in service for one year or more and whose job assignments include maintaining a valid Class B California Driver's License and/or a Verification of Transit Training (VTT) Certificate shall be reimbursed for the renewal fees of such licenses.

8. ACTING ASSIGNMENT PAY

163. 1. EMPLOYEES assigned by the Appointing Officer or its designee to perform a substantial portion of the duties and responsibilities of a higher classification shall receive compensation at a higher salary if all of the following conditions are met:
164. a. the assignment shall be in writing;
165. b. the position to which the EMPLOYEE is assigned must be a budgeted position.
166. c. the EMPLOYEE is assigned to perform the duties of a higher classification for longer than eleven (11) consecutive working days, retroactive to the first day of the assignment.

167. d. Upon written approval by the Appointing Officer or its designee, an EMPLOYEE shall be paid at a step of the established salary grade of the higher class which is at least five percent (5%) above the EMPLOYEE's base salary but which does not exceed the maximum step of the salary grade of the class to which temporarily assigned. Premiums based on percent of salary shall be paid at a rate which includes out of class pay.
168. e. Requests for classification or reclassification review shall not be governed by this provision.
169. Where the above requirements are satisfied but an employee does not receive a premium, the employee must file a grievance within thirty days of written notice of the assignment.
170. 2. Emergency Transit Manager I Assignments. In case of an emergency (a situation occurring unexpectedly and which cannot be planned for), a 9139 supervisor may be assigned to fill the shift of a 9140 Manager. She or he shall receive the pay of a 9140 retroactive to the first day if in the position for five (5) consecutive days or more.

#### 9. SUPERVISORY DIFFERENTIAL ADJUSTMENT

171. The Department of Human Resources may adjust the compensation of a supervisory EMPLOYEE whose compensation grade is set herein subject to the following conditions:
172. The supervisor, as part of the regular responsibilities of his/her class, supervises, directs, is accountable for and is in responsible charge of the work of a subordinate or subordinates.
173. The supervisor must actually supervise the technical content of subordinate work and possess education and/or experience appropriate to the technical assignment.
174. The organization is a permanent one approved by the Department, Board or Commission, where applicable, and is a matter of record based upon review and investigation by the Department of Human Resources.
175. The classifications of both the supervisor and the subordinate are appropriate to the organization and have a normal, logical relationship to each other in terms of their respective duties and levels of responsibility and accountability in the organization.
176. The compensation grade of the supervisor is less than one full step (approximately 5%) over the compensation grade, exclusive of extra pay, of the EMPLOYEE supervised.
177. The adjustment of the compensation grade of the supervisor shall not exceed five (5%) percent over the compensation exclusive of extra pay, of the EMPLOYEE supervised.
178. If the application of this section adjusts the compensation grade of an EMPLOYEE in excess of his/her immediate supervisor, the pay of such immediate supervisor shall be

adjusted to an amount one dollar (\$1) bi-weekly in excess of the base rate of his/her highest paid subordinate, provided that the applicable conditions of this section are also met.

179. In no event will the Department of Human Resources approve a supervisory salary adjustment in excess of two (2) full steps (approximately 10%) over the supervisor's current basic compensation. If in the following fiscal year a salary inequity continues to exist, the Department of Human Resources may again review the circumstances and may grant an additional salary adjustment not to exceed two (2) full steps (approximately 10%).
180. The Human Resources Department shall review any changes in the conditions or circumstances that were and are relevant to the request for salary adjustment under this section either acted upon by or pending before the Human Resources Director.

#### 10. OTHER ADDITIONAL COMPENSATION

181. On-the-job and Ride-Along Training. EMPLOYEES assigned to perform on-the-job training for other EMPLOYEES in their classification shall receive a training premium of \$3.00 per hour but such premium shall be payable only for days and hours actually worked. EMPLOYEES who have volunteered to perform ride-along training for 9163 Transit Operators shall receive the \$3.00 per hour premium for the days and hours actually worked on such assignment.
182. Corner Books. If corner books are required of supervisors working at street locations and are not provided by Department, Department and LOCAL 200 shall meet & confer upon request of LOCAL 200 within thirty (30) days of the ratification of this CBA by the Board of Supervisors as to the reasonable compensation to be paid to supervisors for the time necessary to prepare such corner books.
183. EMPLOYEE(s) covered by this CBA, their spouses and legally dependent children under nineteen (19) years of age who are living with said EMPLOYEE(s), shall be furnished with system passes pursuant to rules presently in effect at Department covering Department operators. Retired EMPLOYEE(s) shall be provided with system passes for the remainder of their lives.

#### 11. SAFETY DIVISION INSTRUCTOR PREMIUM

184. Safety Division Instructors shall receive a premium of \$5.00 per day when required to perform accident determinations.

#### 12. MTA INCENTIVES – FOR SERVICE CRITICAL EMPLOYEES AT MTA

185. Consistent with Proposition E (Charter Section 8.A.100), the MTA and the Union agree to reward employees for the attaining of various service, performance and attendance goals as set forth in Appendix A. The compensation provisions of Appendix A are hereby incorporated by reference into this CBA.

### **III.D. OVERTIME COMPENSATION & COMP. TIME**

186. 1. Overtime and Comp Time Calculation. Except as set forth in Article III.B., time worked in excess of eight (8) hours per day or forty (40) hours per week shall be

designated as overtime and shall be compensated at one-and-one-half times the base hourly rate which may include a night differential if applicable. EMPLOYEES shall not be entitled to overtime compensation for work performed in excess of specified regular hours until they exceed eight (8) hours per day or forty (40) hours per week; provided that employees, if any, working in an alternative work schedule shall be entitled to overtime as provided by III. B. 2. Overtime shall be calculated and paid on the basis of the total number of straight-time hours actually worked in a day and week except that statutory holidays, including floating holidays and furlough days, shall be considered time worked.

187. a. EMPLOYEES occupying Fair Labor Standards Act (“FLSA”) exempt positions, including positions designated by the CITY as “Z” classifications in the Annual Salary Ordinance, shall not be paid for overtime worked but shall be granted compensatory time off at the rate of one and a half times the hours worked, only if the overtime worked has been approved in advance.
188. b. EMPLOYEES covered by the FLSA (non-Z) who are required to work overtime shall be paid at a rate of one and one-half times the regular base rate, unless the employee and the Appointing Officer mutually agree that in lieu of paid overtime, the employee shall be compensated with compensatory time off.
189. c. No Appointing Officer shall require an EMPLOYEE not designated by a "Z" symbol in the Annual Salary Ordinance to work overtime when it is known by said Appointing Officer that funds are legally unavailable to pay said EMPLOYEE, provided that an EMPLOYEE may voluntarily work overtime under such conditions in order to earn compensatory time off at the rate of time and one-half, pursuant to the provisions herein.
190. d. Compensatory time shall be earned at the rate of time and one half. EMPLOYEES occupying non "Z" designated positions shall not accumulate a balance of compensatory time earned in excess of 240 hours calculated at the rate of time and one half.
191. e. EMPLOYEES working overtime during premium pay time shall receive overtime pay based on the premium rate.
192. f. Non-emergency overtime shall be distributed equitably among EMPLOYEE(s) who have current experience in and capacity for the work required, and who indicate their willingness to participate in such work.
193. g. Recordation Of Overtime. All overtime worked which is authorized by the Appointing Officer shall be recorded on separate timerolls. Compensation for overtime worked as provided in this Section shall be paid on an hourly basis. When improved methods of payroll processing are implemented and with the approval of the Human Resources Director and the Controller, such overtime may be recorded on the regular timerolls. The Department shall maintain all records of overtime worked by EMPLOYEE(s) in their

respective divisions/Departments. Copies of said records shall be made available to the representative of LOCAL 200 upon request.

194. h. Overtime Earned (“O.E.”). When an EMPLOYEE covered by this CBA is transferred from one group to another within Department, the accumulated "overtime earned" time shall be transferable by the EMPLOYEE to be used in his or her new position.
195. 1). EMPLOYEES wishing to use OE time must submit the request for the time off in writing not later than 12 noon of the fifth working day preceding the EMPLOYEE'S regular start of shift of the day for which time off is requested.
196. 2). A roster of those EMPLOYEES requesting days off will be maintained by the Department or group manager and will be available to LOCAL 200 for review.
197. 3). The request shall be granted unless an emergency situation exists or the time off would cause severe personnel shortages as determined by the Appointing Officer or its designee.
198. 4). Up to ten percent (10%), but not more than two (2) non "Z" EMPLOYEES per group or Department may be granted time off at the same time, and no more than one "Z" EMPLOYEE per group or Department may be granted time off at any one time. However, "Z" EMPLOYEES may not take time off under this section without the agreement of the Appointing Officer or its designee, if the time off would cause more than fifty percent (50%) of the normal complement of EMPLOYEES in the group or Department to be absent.
199. 5). The first EMPLOYEE to submit a request in a group or Department will take precedence if more than one EMPLOYEE has requested time off at the same time.
200. 6). Requests for time off lasting more than three (3) days must be approved by the group or Department manager.
201. 2. Working on Regular Day Off (“RDO”): EMPLOYEES desiring to work on their regular day off must indicate their availability by signing up on the RDO list. EMPLOYEES shall first be called from the RDO list, based upon a rotational selection process giving all signees equal opportunity.
202. An EMPLOYEE called in to work on a regular day off from the RDO list shall be paid for each hour actually worked, but in no instance will (s)he be provided with less than eight (8) hours of work on that day.
203. If an EMPLOYEE is passed over incorrectly in the RDO rotation pursuant to procedures established by the Department, (s)he will be moved to the top of the list established for their next RDO.

204. An EMPLOYEE called in to work on a regular day off who did not elect to sign the RDO list shall be paid for each hour actually worked, but in no instance will (s)he be provided with less than eight (8) hours of work on that day

RDO Procedures:

- 205. a. Supervisors shall be offered RDO overtime by equal rotation.
- 206. b. Supervisors requesting work shall submit request for work form no later than 48 hours prior to day desiring to work.
- 207. c. The RDO overtime log shall be kept up to date detailing requests and shifts worked. The overtime log will be posted and a copy sent to LOCAL 200.
- 208. d. Rotations shall be computed on a sign-up to sign-up basis and include all 9139's in that section. All work in sections will be rotated.
- 209. e. All personnel in a section who indicate their willingness to work RDO overtime shall be trained in each different aspect of the group policies, type of work and shifts, including special events. Training will take place commencing with the 9139 General Sign-up or within ninety (90) days.
- 210. f. Supervisors requesting to work a type of RDO work and later refusing to work the shift offered within that time frame shall go to the bottom of the list for that type of work, i.e. night work, special events, etc.
- 211. g. No overtime work shall be assigned to a person in another section if there are people in that section willing to work.
- 212. h. These procedures are intended to cover the equal opportunity for RDO overtime work. The appropriate logs shall be kept for each type of work. No supervisor shall be moved to the bottom of the list for refusing to work any shift other than that in the time frame requested.
- 213. i. The Department can fill any shift of five (5) or more hours but less than eight hours in its sole discretion. In the event that the shift is to be filled from the RDO, such opportunities shall be distributed equally and fairly.

**III.E. HOLIDAYS AND HOLIDAY PAY**

214. 1. The following paid holidays shall be observed:

New Year's Day  
Martin Luther King, Jr.'s Birthday  
President's Day  
Memorial Day  
Independence Day  
Columbus Day  
Labor Day  
Thanksgiving Day



Day After Thanksgiving  
Veterans Day  
Christmas Day

215. Provided further, if January 1, July 4, November 11 or December 25 falls on a Sunday, the Monday following is a holiday, and if it falls on a Saturday, the Friday before is a holiday as defined herein. In addition, any day declared to be a holiday by proclamation of the Mayor after such day has heretofore been declared a holiday by the Governor of the State of California or the President of the United States shall be deemed a holiday for this purpose.
216. 2. The CITY shall accommodate religious belief or observance of EMPLOYEES as required by law.
217. 3. Eligibility for Payment. EMPLOYEE(s) not scheduled to work on a paid legal holiday as listed above will be paid for that holiday provided that he/she is on paid status the work day immediately preceding and the work day immediately following the holiday. Payment shall consist of eight (8) hours straight time.
218. 4. Holiday Worked. EMPLOYEE(s) (in non-Z classifications) scheduled to work on a paid legal holiday as listed above shall receive time and one-half for the hours worked, plus the rate of pay as stated in Article III.E.3. herein. EMPLOYEE(s) may elect to receive compensatory time off, computed at the rate of time and one-half in lieu of monetary payment for time worked on paid holidays.
219. 5. EMPLOYEES in "Z" classifications shall receive eight hours holiday pay and in addition shall receive compensatory time off at the rate of one-and-a-half (1-1/2) times for work on the holiday
208. 6. Assignment of Class 9139. On holidays, if the 9139 shift is scheduled to work that day (dependent on the holiday tables used: Saturday, Sunday or Weekday), the 9139 assigned to work that shift shall work on that holiday. If that shift is not scheduled to work, the 9139 assigned to that shift will be off for the holiday. Vacation relief and block personnel who are detailed on holidays shall be considered to be off on holidays.
209. 7. MUNI may excuse any 9139 scheduled to work under the following conditions:
210. a. Unit managers will poll their units to determine who wants to work and who does not. Unit managers will attempt to accommodate 9139's desiring to be excused from work and to fill their shifts with relief or block supervisors who are scheduled to work and want to work the shift. Seniority shall control if there are more 9139's wanting to be excused, or wanting to work, than slots available.
211. b. Block personnel who are detailed on holidays shall be scheduled for holiday work ahead of the relief board.
212. c. Block and relief supervisors will be assigned holiday shifts that become open in seniority order, giving preference to those who want to work.

213. d. When departments or groups normally scheduled to be closed on holidays have work that needs to be performed on a holiday, that work will be offered in seniority order to the 9139 supervisors wanting to work that holiday.
214. 8. **Holidays That Fall On A Saturday.** For those EMPLOYEES assigned to a work week of Monday through Friday, and in the event a legal holiday falls on Saturday, the preceding Friday shall be observed as a holiday; provided, however, that except where the Governor declares that such preceding Friday shall be a legal holiday, each Department head shall make provision for the staffing of public offices under his/her jurisdiction on such preceding Friday so that said public offices may serve the public. Those EMPLOYEES who work on a Friday which is observed as a holiday in lieu of a holiday falling on Saturday shall be compensated as provided in Article III.E.3., herein.
215. 9. **Holiday Pay For EMPLOYEES Laid Off.** An EMPLOYEE who is laid off at the close of business the day before a holiday who has worked not less than five (5) previous consecutive work days shall be paid for the holiday.
216. 10. EMPLOYEES who regularly work a minimum of twenty (20) hours in a bi-weekly pay period shall be entitled to holidays as provided herein on a proportionate basis.
217. 11. **Floating Holidays And Paid Furlough Days.** In addition to the holidays listed herein, the employees covered by this CBA will receive three (3) floating holidays and two (2) paid furlough days. Only EMPLOYEES working a Normal Work Schedule, as described in Article III.B., will receive an additional three (3) floating holidays and two (2) paid furlough days. The three (3) floating holidays and two (2) paid furlough days may be taken on days selected by the EMPLOYEE subject to prior scheduling approval of management. EMPLOYEES must complete six (6) months continuous City service to establish initial eligibility for the three (3) floating holidays and two (2) paid furlough days off. The three (3) floating holidays and two (2) paid furlough days off may not be carried forward from one fiscal year to the next. No compensation of any kind shall be earned or granted for the three (3) floating holidays and two (2) paid furlough days if not taken off. The three (3) floating holidays and two (2) paid furlough days shall not be considered holidays for purposes of calculating holiday compensation for time worked.

### **III.F. SALARY STEP PLAN AND SALARY ADJUSTMENTS**

218. Appointments to positions in the CITY and County Service shall be at the entrance rate established for the position except as otherwise provided herein.

#### 1. Promotive Appointment In A Higher Class

219. An EMPLOYEE or officer who is a permanent appointee following completion of the probationary period or 2,080 hours of permanent service, and who is appointed to a position in a higher classification, either permanent or temporary, deemed to be promotive by the Department of Human Resources shall have his/her salary adjusted to that step in the promotive class as follows:

220. a. If the EMPLOYEE is receiving a salary in his/her present classification equal to or above the entrance step of the promotive class, the EMPLOYEE's salary in the promotive class shall be adjusted to two steps in the compensation grade over the salary received in the lower class but not above the maximum of the salary range of the promotive classification.
221. b. If the EMPLOYEE is receiving a salary in his/her present classification which is less than the entrance step of the salary range of the promotive classification, the EMPLOYEE shall receive a salary step in the promotive class which is closest to an adjustment of 7.5% above the salary received in the class from which promoted. The proper step shall be determined by the bi-weekly compensation grade and shall not be above the maximum of the salary range of the promotive class.
222. c. If the appointment deemed promotive described above is a temporary appointment, and the EMPLOYEE, following a period of continuous service at least equal to the prescribed probationary period is subsequently given another appointment either permanent or temporary, deemed promotive from the prior temporary appointment class, the salary step in the subsequent promotive appointment shall be deemed promotive in accordance with sections herein.
223. For purpose of this Section, appointment of an EMPLOYEE as defined herein to a position in any class the salary grade for which is higher than the salary grade of the EMPLOYEE's class shall be deemed promotive.

## 2. Non-Promotive Appointment

224. An EMPLOYEE or officer who is a permanent appointee following completion of the probationary period or 2,080 hours of permanent service, and who accepts a non-promotive appointment in a classification having the same salary grade, or a lower salary grade, the appointee shall enter the new position at that salary step which is the same as that received in the prior appointment, or if the salary steps do not match, then the salary step which is immediately in excess of that received in the prior appointment, provided that such salary shall not exceed the maximum of the salary grade. Further increments shall be based upon the seniority increment anniversary date in the prior appointment.

## 3. Appointment Above Entrance Rate

225. Upon the request of an Appointing Officer, appointments may be made at any step in the compensation grade upon recommendation of the Human Resources Director under the following conditions:
226. a. A former permanent CITY EMPLOYEE, following resignation with service satisfactory, is being reappointed to a permanent position in his/her former classification; or
227. b. Loss of compensation would result if appointee accepts position at the normal step; or

- 228. c. A severe, easily demonstrated and documented recruiting and retention problem exists, such that all city appointments in the particular class should be above the normal step; and
- 229. d. The Controller certifies that funds are available. To be considered, request for adjustment under the provisions of this Section must be received in the offices of the Department of Human Resources not later than the end of the fiscal year in which the appointment is made.
- 230. e. When the Human Resources Director approves appointments of all new hires in a classification at a step above the entrance rate, the Human Resources Director may advance to that step incumbents in the same classification who are below that step.

#### 4. Reappointment Within Six Months

- 231. A permanent EMPLOYEE who resigns and is subsequently reappointed to a position in the same classification within six (6) months of the effective date of resignation shall be reappointed to the same salary step that the EMPLOYEE received at the time of resignation.

#### 5. Compensation Adjustments

- 232. a. Prior Fiscal Year. When an EMPLOYEE promoted to a higher class during a prior fiscal year receives a lesser salary than if promoted in the same class and from the same grade step during the current fiscal year his/her salary shall be adjusted on July 1, to the rate he/she would have received had he/she been promoted in the current fiscal year.
- 233. The Department of Human Resources is hereby authorized to adjust the salary and anniversary increment date of any EMPLOYEE promoted from one class to a higher classification who would receive a lesser salary than an EMPLOYEE promoted at a later date to the same classification from the same salary step in the same base class from which the promotional examination was held.
- 234. b. Salary Increase in Next Lower Rank. When a classification that was formerly a next lower rank in a regular civil service promotional examination receives a salary grade higher than the salary grade of the classification to which it was formerly promotive, the Department of Human Resources shall authorize a rate of pay to an EMPLOYEE who was promoted from such lower class equivalent to the salary he/she would have received had he/she remained in such lower class, provided that such EMPLOYEE must file with the Department of Human Resources an approved request for reinstatement in accordance with the provisions of the Civil Service Commission rule governing reinstatements to the first vacancy in his/her former classification, and provided further that the increased payment shall be discontinued if the EMPLOYEE waives an offer to promotion from his/her current classification or refuses an exempt appointment to a higher classification. This provision shall not apply to offers of appointment which would involve a change of residence.

235. The special rate of pay herein provided shall be discontinued if the EMPLOYEE fails to file and compete in any promotional examination for which he/she is otherwise qualified, and which has a compensation grade higher than the protected salary of the EMPLOYEE.
236. c. Continuation of Salary Step Plan Earned Under Temporary Appointment. When an EMPLOYEE is promoted under temporary appointment to a higher classification during a prior fiscal year and is continued in the same classification without a break in service in the current fiscal year, or is appointed to a permanent position in the same classification, such appointment shall be in accordance with the provisions of this agreement, provided that the salary shall not be less than the same step in the salary grade the EMPLOYEE received in the immediately prior temporary appointment.
237. d. Credit for Temporary Service. A temporary EMPLOYEE, one with no permanent status in any class, certified from a regular civil service list who has completed six months or more of temporary employment within the immediately preceding one year period before appointment to a permanent position in the same class shall be appointed at the next higher step in the salary grade and to successive steps upon completion of the six months or one year required service from the date of permanent appointment. These provisions shall not apply to temporary EMPLOYEES who are terminated for unsatisfactory services or resign their temporary position.
238. e. Salary Anniversary Date Adjustment. Permanent EMPLOYEES working under provisional, exempt or temporary appointments in other classifications shall have their salary adjusted in such other classifications when such EMPLOYEES reach their salary anniversary date in their permanent class.

6. Compensation Upon Transfer Or Re-Employment.

239. a. Transfer. An EMPLOYEE transferred in accordance with Civil Service Commission rules from one Department to another, but in the same classification, shall transfer at his/her current salary, and if he/she is not at the maximum salary for the class, further increments shall be allowed following the completion of the required service based upon the seniority increment anniversary date in the former Department.
240. b. Reemployment in Same Class Following Layoff. An EMPLOYEE who has acquired permanent status in a position and who is laid off because of lack of work or funds and is re-employed in the same class after such layoff shall be paid the salary step attained prior to layoff.
241. c. Reemployment in an Intermediate Class. An EMPLOYEE who has completed the probationary period in a promotive appointment that is two or more steps higher in an occupational series than the permanent position from which promoted and who is subsequently laid off and returned to a position in an

intermediate ranking classification shall receive a salary based upon actual permanent service in the higher classification, unless such salary is less than the EMPLOYEE would have been entitled to if promoted directly to the intermediate classification. Further increments shall be based upon the increment anniversary date that would have applied in the higher classification.

242. d. Reemployment in a Formerly Held Class. An EMPLOYEE who has completed the probationary period in an entrance appointment who is laid off and is returned to a classification formerly held on a permanent basis shall receive a salary based upon the original appointment date in the classification to which the EMPLOYEE is returned. An EMPLOYEE who is returned to a classification not formerly held on a permanent basis shall receive a salary in accordance with this agreement.

### **III.G. METHODS OF CALCULATION**

243. An EMPLOYEE whose compensation is fixed on a monthly basis shall be paid monthly or bi-weekly in accordance with State Law or other applicable provision. There shall be no compensation for time not worked unless such time off is authorized time off with pay.
244. Conversion to Bi-Weekly Rates. Rates of compensation established on other than a bi-weekly basis may be converted to bi-weekly rates by the Controller for payroll purposes.

### **III.H. SENIORITY INCREMENTS**

245. 1. Entry At The First Step. Full time EMPLOYEES shall advance to the second step upon completion of six months service and to each successive step upon completion of the one year required service.
246. 2. Entry At Other Than The First Step. EMPLOYEES who enter a classification at a rate of pay at other than the first step shall advance one step upon completion of the one year required service. Further increments shall accrue following completion of the required service at this step and at each successive step.
247. 3. Date Increment Due. Increments shall accrue and become due and payable on the next day following completion of required service as an EMPLOYEE in the class, unless otherwise provided herein.
248. 4. Exceptions. An EMPLOYEE shall not receive a salary adjustment based upon service as herein provided if he/she has been absent by reason of suspension or on any type of leave without pay (excluding a military, educational, or industrial accident leave) for more than one-sixth of the required service in the anniversary year, provided that such EMPLOYEE shall receive a salary increment when the aggregate time worked since his/her previous increment equals or exceeds the service required for the increment, and such increment date shall be his/her new anniversary date; provided that time spent on approved military leave or in an appointive or promotive position shall be counted as actual service when calculating salary increment due dates.

249. 5. When records of service required for advancement in the step increments within a compensation grade are established and maintained by electronic data processing, then the following shall apply: An EMPLOYEE shall be compensated at the beginning step of the compensation grade plan, unless otherwise specifically provided for in this CBA. EMPLOYEES shall receive salary adjustments through the steps of the compensation grade plan by completion of actual paid service in total scheduled hours equivalent to one year or six months, whichever is applicable.
250. 6. Paid service for this purpose is herein defined as exclusive of any type of overtime but shall include military or educational leave without pay.
251. 7. An EMPLOYEE who (1) has completed probation in a permanent position, (2) is "Laid Off" from said position, (3) is immediately and continuously employed in another classification with the CITY either permanent or temporary, and (4) is thereafter employed in his/her permanent position without a break in service, shall, for the purposes of determining salary increments, receive credit for the time served while laid off from his/her permanent position.

### **III.I. WORKERS COMPENSATION LEAVE**

252. An EMPLOYEE who is absent because of an occupational disability and who is receiving Temporary Disability, Vocational Rehabilitation Maintenance Allowance, State Disability Insurance, may request that the amount of disability indemnity payment be supplemented with salary to be charged against the EMPLOYEE's accumulated unused sick leave with pay credit balance at the time of disability, compensatory time off, or vacation, so as to equal the normal salary the EMPLOYEE would have earned for the regular work schedule. Use of compensatory time requires the EMPLOYEE's Appointing Officer's approval.
253. An EMPLOYEE who wishes not to supplement, or who wishes to supplement with compensatory time or vacation, must submit a written request to the Appointing Officer or designee within seven (7) calendar days following the first date of absence. Disability indemnity payments will be automatically supplemented with sick pay credits (if the EMPLOYEE has sick pay credits and is eligible to use them) to provide up to the EMPLOYEE's normal salary unless the EMPLOYEE makes an alternative election as provided in this section.
254. EMPLOYEE supplementation of workers compensation payment to equal the full salary the EMPLOYEE would have earned for the regular work schedule in effect at the commencement of the workers compensation leave shall be drawn only from an EMPLOYEE's paid leave credits including vacation, sick leave balance, or other paid leave as available. An EMPLOYEE returning from disability leave will accrue sick leave at the regular rate and not an accelerated rate.
255. Salary may be paid on regular time-rolls and charged against the EMPLOYEE's sick leave with pay, vacation, or compensatory time credit balance during any period prior to the determination of eligibility for disability indemnity payment without requiring a signed option by the EMPLOYEE.

256. Sick leave with pay, vacation, or compensatory time credits shall be used to supplement disability indemnity pay at the minimum rate of one (1) hour units.
257. The parties agree, therefore, that this provision clarifies and supercedes any conflicting provision of the Civil Service Commission Rules bargainable and arbitrable under Charter section A8.409, et seq.

#### Return To Work

258. The CITY will make a good faith effort to return EMPLOYEES covered by this CBA who have sustained an occupational injury or illness to temporary modified duty within the EMPLOYEE's medical restriction. Duties of the modified assignment may differ from the EMPLOYEE's regular job duties and/or from job duties regularly assigned to EMPLOYEES in the injured EMPLOYEE's class. Where appropriate modified duty is not available within the EMPLOYEE's classification, on the EMPLOYEE's regular shift, and in the EMPLOYEE's Department, the EMPLOYEE may be temporarily assigned pursuant to this section to work in another classification, on a different shift, and/or in another Department, subject to the approval of the Appointing Officer or designee. The decision to provide modified duty and/or the impact of such decisions shall not be subject to grievance or arbitration. Modified duty assignments may not exceed three (3) months. An EMPLOYEE assigned to a modified duty assignment shall receive their regular base rate of pay and shall not be eligible for any other additional compensation (premiums) and or out of class assignment pay as may be provided under this agreement.
259. The City reserves the right to take any action necessary to comply with its obligations under the Americans with Disabilities Act, the Fair Employment and Housing Act and all other applicable federal, state and local disability anti-discrimination statutes. Requests for accommodation under the ADA or FEHA shall be governed under separate City procedures established under those laws.

### **III.J. STATE DISABILITY INSURANCE (SDI)**

260. All employees in the bargaining unit(s) covered by this Agreement shall be enrolled in the State Disability Insurance (SDI) Program. The cost of SDI will be paid by the employee through payroll deduction at a rate established by the State of California Employment Development Department.

### **III.K. HEALTH AND WELFARE**

#### 1. EMPLOYEE HEALTH CARE

261. Health Service System Contributions. CITY shall contribute to the City Health Service System for each EMPLOYEE covered by this CBA who is a member of the Health Service System such sums as are required by the CITY Charter. The CITY agrees to maintain its contribution for health benefits at the current levels for the life of the agreement.
262. Medically Single. For "medically single" employees, i.e., benefited employees not receiving the contribution paid by the City for dependent health care benefits, the city shall contribute all of the premium for the employee's own health care benefit coverage.



263. Life Insurance. A life insurance policy of \$14,000 with a permanent total disability benefit provision, subject to the conditions and provisions of said policy, shall be provided for all EMPLOYEES covered by this CBA with five (5) years or more of service, the full premium cost of which shall be paid for by the Department. For EMPLOYEES with one (1) year or more but with less than five (5) years of service a similar policy of \$6,000 will be provided. Coverage shall be suspended for an EMPLOYEE who has been off the payroll and been absent from service for a continuous period of twelve months.
264. Eye Examinations. For all covered EMPLOYEES required to use VDTs on average at least two (2) hours per day, the Department will provide a base line eye examination at the Occupational Safety and Health facility ("OSH"), followed by an eye examination at OSH every two years.

2. DEPENDENT HEALTH CARE PICK-UP

265. Amount of Employee Contribution to be Paid by the City: The City shall contribute \$225 per month per employee to provide for dependent coverage for employees with one or more dependents. However, in the event that the cost of dependent care exceeds \$225 per month, the City will adjust its pick-up level up to 75% of the cost of Kaiser's dependent health care medical premium coverage for the employee plus two or more dependents category.

3. DENTAL COVERAGE

266. Each employee covered by this agreement shall be eligible to participate in the City's dental program.

4. CONTRIBUTIONS WHILE ON UNPAID LEAVE

267. As set forth in Administrative Code section 16.701(b), covered employees who are not in active service for more than twelve (12) weeks shall be required to pay the Health Service System for the full premium cost of membership in the Health Service System, unless the employee shall be on sick leave, workers' compensation, mandatory administrative leave, approved personal leave following family care leave, disciplinary suspensions, or on a layoff holdover list where the employee verifies they have no alternative coverage.

**III.L. RETIREMENT PICK-UP**

268. For the term of this Agreement, the CITY shall continue to pick-up the EMPLOYEES' portion of their retirement contribution at the current rate.
269. If it is determined through the voter process or through CITY action as a result of negotiations with any other Miscellaneous bargaining unit (as described by Charter section A8.409) to improve retirement benefits for other Miscellaneous employees, such improvements shall be extended to employees covered by this Agreement. The effective date for such improvements to LOCAL 200's retirement benefits shall be the date such improvement are ratified in the other Miscellaneous employees' collective bargaining agreement.

### Retirement Seminar

270. Subject to development, availability and scheduling by SFERS, employees shall be allowed not more than one day during the life of this CBA to attend a pre-retirement planning seminar sponsored by SFERS.
271. Employees must provide at least two-weeks advance notice of their desire to attend a retirement planning seminar to the appropriate supervisor. An employee shall be released from work to attend the seminar unless staffing requirements or other Department exigencies require the employee's attendance at work on the day or days such seminar is scheduled. Release time shall not be unreasonably withheld.
270. All such seminars must be located within the Bay Area.
271. This section shall not be subject to the grievance procedure

### **III.M. PILOT WELLNESS INCENTIVE PROGRAM**

272. Effective July 1, 2002, any fulltime employee leaving the employment of the city upon service or disability retirement may receive payment for a portion of sick leave earned but unused at the time of separation.
273. The amount of this payment shall be equal to two and one-half percent (2.5%) of sick leave balances earned but unused at the time of separation times the number of whole years of continuous employment times an employees salary rate, exclusive of premiums or supplements, at the time of separation. Vested sick leave hours, as described by CSC rules, shall not be included in this computation.
274. For example:
- Employee A retires with 20 years of service.  
Employee A has a sick leave balance of 500 hours  
Employee A has a base salary rate of \$50.00 per hour at the time of separation.
- Wellness Incentive = 2.5% for each year of service \*20 years of service = 50%  
50% \*500 hours = 250 hours  
250 hours \*\$50.00 (base salary rate at time of separation) = \$12,500.00
275. The number of hours for which an employee may receive cash payment shall not exceed one thousand forty (1040) including any vested sick leave hours.
276. The wellness incentive bonus shall not be considered as part of an employee's compensation for the purpose of computing retirement benefits.

### **III.N. LEAVES OF ABSENCE**

277. Those portions of the Civil Service Commission Rules applicable to Leaves, which are negotiable and arbitrable pursuant to Charter Sections A8.409 et seq., may not be changed during the term of this Agreement except by mutual consent. Those matters within the jurisdiction of the Civil Service Commission are not subject to grievance or arbitration.

278. Bereavement Leave. Three (3) days' leave with pay shall be allowed to each EMPLOYEE for a death as defined in the Civil Service Commission Rule regarding Bereavement Leave which includes but is not limited to mother, father, sister, brother, husband, wife, son and daughter, mother-in-law, father-in-law, and dependent relatives living in the EMPLOYEE's home.

### **III.O. CHILD CARE AND DCAP**

279. The CITY and LOCAL 200 agree that employees covered by this CBA will be eligible to participate in any childcare programs made available to all CITY employees.

#### Dependent Care Reimbursement Account (DCAP)

280. The City shall continue to offer a flexible spending account for Dependent Care Reimbursement (DCAP) which allows employees to establish a "pre-tax" account of up to \$5,000 per year to reimburse dependent care costs.

#### Parental Release Time

281. Represented employees shall be granted paid release time to attend parent teacher conferences of four (4) hours per fiscal year (for children in kindergarten or grades 1 to 12).
282. In addition, an employee who is a parent or who has child rearing responsibilities (including domestic partners but excluding paid child care workers) of one or more children in kindergarten or grades 1 to 12 shall be granted unpaid release time of up to forty (40) hours each fiscal year, not exceeding eight (8) hours in any calendar month of the fiscal year, to participate in the activities of the school of any child of the employee, providing the employee, prior to taking the time off, gives reasonable notice of the planned absence. The employee may use vacation, floating holiday hours, or compensatory time off during the planned absence.

### **III.P. LONG TERM DISABILITY INSURANCE**

283. The City, at its own cost, shall provide to employees a Long Term Disability (LTD) benefit that provides, after a one hundred and eighty (180) day elimination period, sixty percent salary (60%) (subject to integration) up to age sixty-five (65). Employees who are receiving or who are eligible to receive LTD shall be eligible to participate in the City's Catastrophic Illness Program as set forth in the ordinance governing such program.

### **III.Q. TUITION REIMBURSEMENT**

284. The City agrees to allocate six thousand dollars (\$6,000) per each year of this agreement to the Tuition Reimbursement Program for the exclusive use of classifications represented hereunder. Employees in said classifications may not receive more than (\$500) per fiscal year from this special allocation. If any portion of said allocation remains unexpended on June 30<sup>th</sup> of any fiscal year, it shall be carried over to the next fiscal year. The Union shall be sent a quarterly report of the persons who have applied for tuition reimbursements, purpose of reimbursement, and monies allocated.

285. Eligibility: Any regularly scheduled Employee within the City service who has served a minimum of one (1) year of continuous service in any class immediately prior to receipt of application may apply for tuition reimbursement. Such reimbursement shall be for training courses pertaining to the duties of a higher classification or for the purpose of improving performance in the present classification when such courses are offered by an accredited educational institution.
286. Expenses: The City will reimburse each eligible Employee up to \$500 annually for tuition, books, supplies, and other fees for such course if attendance has been approved in advance. The City will attempt to make such payment promptly upon the Employee's submission of proof of satisfactory completion of the course with a passing grade. If the course is not graded, or is not a credited course, an official transcript or other official document shall be deemed evidence of satisfactory completion.
287. Pre-Approval: Application for reimbursement shall be prepared on a form provided by the Department of Human Resources. Courses require pre-approval by the Department of Human Resources and the Appointing Officer (or designee), neither of which shall be unreasonably denied. Such application for tuition reimbursement shall be made prior to the date of enrollment in the course and, if approved by the Department of Human Resources and the Appointing Officer (or designee), reimbursement shall be subject to successful completion of the course. No reimbursement shall be made if the Employee is eligible to receive reimbursement for said tuition under a federal or State Veterans benefit program from other public funds.
288. Repayment: If an employee resigns from the City within two (2) years following completion of the training course, the amount of tuition reimbursement shall be repaid by the Employee to the City by cash payment or out of the Employee's last pay warrant or, if applicable retirement earnings.

## ARTICLE IV - WORKING CONDITIONS

### IV.A. HEALTH & SAFETY

289. The CITY acknowledges that State law requires every employer to provide a safe, healthy work environment for its employees. The CITY agrees to take all steps within its power to meet this responsibility for the EMPLOYEES covered by this CBA.
290. Joint Safety Committee. Health and Safety issues shall be presented to and addressed at the Joint Labor Management Board (JLMB"), as described in Article II.G. (Joint Committees).
291. For health and safety matters of immediate concern, the JLMB, at the call of either party, shall designate a Joint Safety Committee (hereafter termed "JSC") composed of one person appointed by LOCAL 200 and one person appointed by the Appointing Officer, or its designee. The JSC shall meet within five (5) days of the call of the JLMB. If one party refuses or fails to meet when a meeting is called, the other party may proceed with the selection of an independent, neutral committee member, who shall be knowledgeable in the field of health and safety and who shall serve as chairperson, and the JSC shall commence its activities. The cost of the independent chairperson shall be split between Department and LOCAL 200. The JSC shall consider and propose action on any aspect of Department operations affecting the health and safety of EMPLOYEES covered by this CBA. If any action proposed by a majority of the members of the JSC is not implemented, subject to the budgetary and fiscal provisions of the Charter, the JSC is authorized to take reasonable steps to publish, at Department's expense, its findings and proposed action.
292. Health and safety issues to be considered by the JLMB shall include, but not limited to, ergonomics, use of city owned vehicles, shelters for street corner locations, use and inspection of video display terminals, chemical compounds, and use of personal vehicles for shelters during inclement weather.
293. City Owned Vehicle Check Procedure. The representatives from LOCAL 200 and MUNI will review all street management vehicles to assess their operable conditions. A list will be established and maintained of all these vehicles and their maintenance status. The Defect Reporting form, as mutually developed by the parties, shall be used by the street supervisor for the chronicling of vehicle defects. Each street supervisor who uses any City vehicles will be responsible for filling out a daily defect form regardless of whether a defect is noted or not. Group Managers or their designees will be responsible for reporting defects to Equipment Maintenance for corrective action. Group Managers will also be responsible for keeping records on defects and when the problem is corrected. Supervisors will not be required to operate vehicles with critical defects and should be assigned another vehicle. Both parties agree that priority for new Operations Division vehicles shall be given to the groups for street management. No vehicles shall be sent out on the street after 6:00 p.m. without working heaters and defrosters. LOCAL 200 will receive a copy of the maintenance status report of the defect cards.
294. Shelters for Street Supervisors. The parties agree that there is a continuing need for shelters for Street Supervisors.

295. Parking Problems. LOCAL 200 and MUNI agree to meet with the Department of Parking and Traffic in order to address the ongoing Street Supervisor and Central Control parking problems.
296. Use of Personal Vehicles as Shelters. If no shelter or MUNI automobile is available for use by a Street Supervisor, those supervisors may use their personal vehicles for shelter subject to the following conditions: (a) all lines under the supervisor's direction are visible from the vehicle; (b) the vehicle is legally parked (whenever possible); (c) during inclement weather; and (d) while writing required written reports. At no time may the supervisor sit in a vehicle when the lines being supervised are in difficulty. It is understood that sitting in a personal vehicle under the above described conditions is an option available to the supervisor. It is not a requirement and therefore the use of one's personal vehicle is done so at the risk of the supervisor. Supervisors needing to use their personal vehicles as shelters shall be issued the official MUNI Supervisor on Duty placards.

#### **IV.B. UNIFORMS & EQUIPMENT**

297. Full and appropriate uniforms shall be supplied to all EMPLOYEE(S) who are required by MUNI to wear uniforms on duty. In addition to full uniforms, all EMPLOYEE(S) who are required by their duties to work outdoors shall not be required to perform their normal work duties in the rain, wind or cold without being provided adequate foul-weather gear. The City agrees to provide all required safety equipment (i.e., protective eyewear, protective footwear) in compliance with Cal-OSHA regulations.
298. Female EMPLOYEE(S) shall be provided with an appropriate female uniform equivalent to that furnished to male EMPLOYEE(S).
299. Uniform items will be replaced by MUNI when they become unserviceable. A complete uniform set will consist of: two (2) jackets; one (1) long sleeved sweater; one (1) sleeveless sweater; two (2) ties or scarves; four (4) pairs of trousers or skirts; five (5) shirts or blouses; and one (1) hat.
300. Foul-weather gear, appropriate for both male and female sizes, shall consist of the following items in a pool set aside for those requiring said items: one (1) foul-weather jacket; one (1) pair foul-weather trousers; one (1) warm outer jacket; and one (1) cold weather hat.
301. The Appointing Officer or its designee shall continue to meet and confer with LOCAL 200 regarding the concept of safety with regard to TS uniforms.
302. For 7412 Automotive Service Worker Assistant Supervisor, the CITY agrees to provide one (1) clean pair of protective coveralls each working day to each employee. The cost of coveralls and laundering of the same shall be paid by the CITY. The employee is responsible for safeguarding coveralls issued to him/her and will be held responsible for the value of any coveralls lost, stolen or damaged beyond fair wear and tear. Evidence of forced entry to an employee locker will be grounds for relieving an employee of responsibility for stolen coveralls. Responsibility for losses of individual sets of coveralls will be determined by the worker's supervisor on a case-by-case basis.
303. Radios. MUNI will make every effort to see that each inspector will have a working radio.

## ARTICLE V - SCOPE OF AGREEMENT

### V.A. SCOPE OF AGREEMENT

304. 1. Savings clause. Should any part hereof or any provision herein be declared invalid by reason of conflict with a charter provision or existing ordinances or resolutions which the Board of Supervisors had not agreed to alter, change or modify, or by any decree of a court, such invalidation of such part of portion of this CBA shall not invalidate the remaining portions hereof and the remaining portions hereof shall remain in full force and effect for the duration of the CBA.
305. This CBA sets forth the full and entire understanding of the parties regarding the matters herein. This Agreement may be modified, but only in writing, upon the mutual consent of the parties.
306. 2. Civil Service Rules & Administrative Code. Nothing in this Agreement shall alter the Civil Service Rules excluded from arbitration pursuant to Charter Section A8.409-3. In addition, such excluded Civil Service Rules may be amended during the term of this Agreement and such changes shall not be subject to any grievance and arbitration procedure but shall be subject to meet & confer negotiations, subject to applicable law. The parties agree that, unless specifically addressed herein, those terms and conditions of employment that are currently set forth in the Civil Service Rules and the Administrative Code, are otherwise consistent with this Agreement, and are not excluded from arbitration under Charter Section A8.409-3 shall continue to apply to EMPLOYEES covered by this contract.
307. 3. As required by Charter Section A8.409-3, the Civil Service Commission retains sole authority to interpret and to administer all Civil Service Rules. Disputes between the parties regarding whether a Civil Service Rule or a component thereof is excluded from arbitration shall be submitted for resolution to the Civil Service Commission. All such disputes shall not be subject to the grievance and arbitration process of the Agreement.

### V.B. DURATION OF AGREEMENT

308. This Agreement shall be effective July 1, 2001, and shall remain in full force and effect through June 30, 2003.

IN WITNESS HEREOF, the parties hereto have executed this MOU this \_\_\_\_\_ day of \_\_\_\_\_, 2001.

FOR THE CITY AND COUNTY OF SAN FRANCISCO

FOR THE UNION

\_\_\_\_\_  
Andrea R. Gourdine  
Director, Human Resource Services

\_\_\_\_\_  
Lawrence Martin  
International Vice President, Transport Workers Union of America, AFL-CIO

\_\_\_\_\_  
Geoffrey L. Rothman  
Director, Employee Relations Division

\_\_\_\_\_  
Alice Fialkin  
President  
Transport Workers Union, Local 200

\_\_\_\_\_  
Larry Williams  
Deputy General Manager, MTA

\_\_\_\_\_  
Nathaniel Jackson  
Executive Vice President  
Transport Workers Union, Local 200

\_\_\_\_\_  
Curtis Taylor  
Secretary-Treasurer  
Transport Workers Union, Local 200

APPROVED AS TO FORM:  
LOUISE H. RENNE, CITY ATTORNEY

\_\_\_\_\_  
Linda Ross  
Chief Labor Attorney



## ATTACHMENT A – Compensation Grades

Effective Date	Class Title	Salary Grade	Biweekly Rate of Pay				
			Step 1	Step 2	Step 3	Step 4	Step 5
7/1/2001	1773 MEDIA TRAINING SPECIALIST	06400	\$2,074	\$2,178	\$2,287	\$2,401	\$2,521
	7412 AUTOMOTIVE SERVICE WORKER ASST. SUPVR.	05835	\$1,577	\$1,654	\$1,736	\$1,823	\$1,914
	8121 FARE INSPECTIONS SUPERVISOR/INVESTIGATOR	06280	\$1,955	\$2,053	\$2,156	\$2,264	\$2,377
	8126 SR. INVESTIGATOR, OFC.OF CITIZEN COMPLAINTS	06580	\$2,264	\$2,377	\$2,496	\$2,621	\$2,752
	9135 PASSENGER SERVICE SPECIALIST	05830	\$1,573	\$1,650	\$1,731	\$1,818	\$1,909
	9139 TRANSIT SUPERVISOR I	06450	\$2,124	\$2,230	\$2,342	\$2,459	\$2,582
	9140 TRANSIT MANAGER I	06700	\$2,401	\$2,521	\$2,647	\$2,779	\$2,918
	9141 TRANSIT MANAGER II	06950	\$2,711	\$2,847	\$2,989	\$3,138	\$3,295
	9150 TRAIN CONTROLLER	06700	\$2,401	\$2,521	\$2,647	\$2,779	\$2,918
	9155 CLAIMS INVESTIGATOR	06640	\$2,332	\$2,449	\$2,571	\$2,700	\$2,835
	9156 SENIOR CLAIMS INVESTIGATOR	06840	\$2,571	\$2,700	\$2,835	\$2,977	\$3,126
	9157 CLAIMS ADJUSTER	06840	\$2,571	\$2,700	\$2,835	\$2,977	\$3,126
	9173 SYSTEMS SAFETY INSPECTOR	06740	\$2,449	\$2,571	\$2,700	\$2,835	\$2,977
1/5/2002	1773 MEDIA TRAINING SPECIALIST	06440	\$2,115	\$2,221	\$2,332	\$2,449	\$2,571
	7412 AUTOMOTIVE SERVICE WORKER ASST. SUPVR.	05845	\$1,607	\$1,686	\$1,769	\$1,858	\$1,951
	8121 FARE INSPECTIONS SUPERVISOR/INVESTIGATOR	06320	\$1,994	\$2,094	\$2,199	\$2,309	\$2,424
	8126 SR. INVESTIGATOR, OFC.OF CITIZEN COMPLAINTS	06570	\$2,309	\$2,424	\$2,545	\$2,672	\$2,806
	9135 PASSENGER SERVICE SPECIALIST	05870	\$1,603	\$1,682	\$1,765	\$1,853	\$1,946
	9139 TRANSIT SUPERVISOR I	06450	\$2,124	\$2,230	\$2,342	\$2,459	\$2,582
	9140 TRANSIT MANAGER I	06740	\$2,449	\$2,571	\$2,700	\$2,835	\$2,977
	9141 TRANSIT MANAGER II	06940	\$2,764	\$2,902	\$3,047	\$3,199	\$3,359
	9150 TRAIN CONTROLLER	06740	\$2,449	\$2,571	\$2,700	\$2,835	\$2,977
	9155 CLAIMS INVESTIGATOR	06680	\$2,377	\$2,496	\$2,621	\$2,752	\$2,890
	9156 SENIOR CLAIMS INVESTIGATOR	06880	\$2,621	\$2,752	\$2,890	\$3,035	\$3,187
	9157 CLAIMS ADJUSTER	06880	\$2,621	\$2,752	\$2,890	\$3,035	\$3,187
	9173 SYSTEMS SAFETY INSPECTOR	06770	\$2,496	\$2,621	\$2,752	\$2,890	\$3,035
7/1/2002	1773 MEDIA TRAINING SPECIALIST	06490	\$2,166	\$2,274	\$2,388	\$2,507	\$2,632
	7412 AUTOMOTIVE SERVICE WORKER ASST. SUPVR.	05955	\$1,670	\$1,752	\$1,840	\$1,932	\$2,028
	8121 FARE INSPECTIONS SUPERVISOR/INVESTIGATOR	06370	\$2,043	\$2,145	\$2,252	\$2,365	\$2,483
	8126 SR. INVESTIGATOR, OFC.OF CITIZEN COMPLAINTS	06620	\$2,365	\$2,483	\$2,607	\$2,737	\$2,874
	9135 PASSENGER SERVICE SPECIALIST	05920	\$1,642	\$1,723	\$1,809	\$1,899	\$1,994
	9139 TRANSIT SUPERVISOR I	06540	\$2,221	\$2,332	\$2,449	\$2,571	\$2,700
	9140 TRANSIT MANAGER I	06790	\$2,507	\$2,632	\$2,764	\$2,902	\$3,047
	9141 TRANSIT MANAGER II	06990	\$2,835	\$2,977	\$3,126	\$3,282	\$3,446
	9150 TRAIN CONTROLLER	06790	\$2,507	\$2,632	\$2,764	\$2,902	\$3,047
	9155 CLAIMS INVESTIGATOR	06730	\$2,435	\$2,557	\$2,685	\$2,819	\$2,960
	9156 SENIOR CLAIMS INVESTIGATOR	06930	\$2,685	\$2,819	\$2,960	\$3,108	\$3,263
	9157 CLAIMS ADJUSTER	06930	\$2,685	\$2,819	\$2,960	\$3,108	\$3,263
	9173 SYSTEMS SAFETY INSPECTOR	06820	\$2,557	\$2,685	\$2,819	\$2,960	\$3,108
1/4/2003	1773 MEDIA TRAINING SPECIALIST	06540	\$2,221	\$2,332	\$2,449	\$2,571	\$2,700
	7412 AUTOMOTIVE SERVICE WORKER ASST. SUPVR.	05945	\$1,710	\$1,796	\$1,886	\$1,980	\$2,079
	8121 FARE INSPECTIONS SUPERVISOR/INVESTIGATOR	06420	\$2,094	\$2,199	\$2,309	\$2,424	\$2,545
	8126 SR. INVESTIGATOR, OFC.OF CITIZEN COMPLAINTS	06670	\$2,424	\$2,545	\$2,672	\$2,806	\$2,946
	9135 PASSENGER SERVICE SPECIALIST	05970	\$1,682	\$1,765	\$1,853	\$1,946	\$2,043
	9139 TRANSIT SUPERVISOR I	06540	\$2,221	\$2,332	\$2,449	\$2,571	\$2,700
	9140 TRANSIT MANAGER I	06840	\$2,571	\$2,700	\$2,835	\$2,977	\$3,126
	9141 TRANSIT MANAGER II	07040	\$2,902	\$3,047	\$3,199	\$3,359	\$3,527
	9150 TRAIN CONTROLLER	06840	\$2,571	\$2,700	\$2,835	\$2,977	\$3,126
	9155 CLAIMS INVESTIGATOR	06780	\$2,496	\$2,621	\$2,752	\$2,890	\$3,035
	9156 SENIOR CLAIMS INVESTIGATOR	06980	\$2,752	\$2,890	\$3,035	\$3,187	\$3,346
	9157 CLAIMS ADJUSTER	06980	\$2,752	\$2,890	\$3,035	\$3,187	\$3,346
	9173 SYSTEMS SAFETY INSPECTOR	06870	\$2,621	\$2,752	\$2,890	\$3,035	\$3,187

JULY 1, 2001 - JUNE 30, 2003 CBA BETWEEN CITY AND COUNTY OF SAN FRANCISCO  
AND TRANSPORT WORKERS' UNION, AFL-CIO, LOCAL 200

## **APPENDIX A**

### **MTA Performance Incentive Program & MTA Attendance Incentive Program**

The MTA Performance and Attendance Incentive Programs of this Appendix A apply only to employees in “service-critical” classes at MTA.

The benefits of these programs are only available to “service-critical” employees while employed at MTA. Employees who leave or transfer out of “service-critical” employment at MTA lose the benefits of these programs.

#### **MTA PERFORMANCE INCENTIVE PROGRAM**

A Performance Incentive Program is established for “service-critical” employees at the Municipal Transportation Agency (MTA) in each of the following Occupational Groups:

- Maintenance Group
- Operations Group
- Administration Group

Service Standards are developed for each Occupational Group, and Performance Goals are established for each Service Standard. Service-critical employees responsible for achievement of Performance Goals are identified for each goal.

#### **SERVICE STANDARDS**

The following Service Standards are established for each Occupational Group:

##### **MAINTENANCE GROUP:**

1. Percentage of vehicles that run on time according to published schedules.
2. Increase vehicle miles between road calls by mode.
3. Total number days of unscheduled absences.
4. Total number of lost days due to industrial injury/illness.

##### **OPERATIONS GROUP:**

1. Percentage of vehicles that run on time according to published schedules.
2. Percentage of scheduled hours delivered.
3. Total number days of unscheduled absences.
4. Total number of lost days due to industrial injury/illness

**ADMINISTRATION GROUP:**

- 1. Percentage of vehicles that run on time according to published schedules.
- 2. Total number days of unscheduled absences.

**HOW PROGRESS IS MEASURED**

Performance Goals will be developed each fiscal year for the above listed Service Standards. For each Performance Goal, a Mode and/or Division Goal may be established. Progress toward achievement of these Performance Goals will be tracked and measured each fiscal year. A “Qualifying Fiscal Year” is defined as follows:

- July 1, 2001 – June 30, 2002
- July 1, 2002 – June 30, 2003

When Performance Goals are achieved, Incentive Bonuses will be paid to eligible employees in each Occupational Group at the end of a fiscal quarter during which goal(s) were achieved. A “Qualifying Fiscal Quarter” is defined as follows:

- 1. July 1, - September 30
- 2. October 1, - December 31
- 3. January 1, - March 31
- 4. April 1, - June 30

**INCENTIVE BONUSES**

Incentive Bonuses will be paid quarterly based on Occupational Group achievement of one or more of the Performance Goals established for each Service Standard. Separate bonuses will be paid based on achievement of overall Occupational Group Goals and/or Mode or Division Goals.

Incentive Bonuses will be paid to each eligible “service-critical” employee of an Occupational Group following a Qualifying Calendar Quarter during which a group goal(s) were achieved. Bonuses will be paid no later than sixty (60) calendar days following the end of a Qualifying Calendar Quarter during which group goals were achieved. Incentive Bonuses will be itemized and paid by check to each eligible group member, after deducting applicable federal and state taxes.

Incentive Bonuses shall not be considered as part of an employee’s compensation for the purpose of computing retirement benefits.

Incentive Bonuses will be paid to eligible “service-critical” employees based on the achievement of Occupational Group and/or Mode/Division Goals as follows:

**OVERALL GROUP GOALS**

Number of Goals Achieved

Quarterly Bonus

Four (4) Group Goals achieved	\$150.00
Three (3) Group Goals achieved	90.00
Two (2) Group Goals achieved	60.00
One (1) Group Goal achieved	30.00

**MODE/DIVISION GOALS**

Number of Goals Achieved	Quarterly Bonus
Four (4) Mode/Division Goals achieved	\$225.00
Three (3) Mode/Division Goals achieved	150.00
Two (2) Mode/Division Goals achieved	90.00
One (1) Mode/Division Goals achieved	60.00

**ELIGIBLE EMPLOYEE CRITERIA**

To be eligible to receive payment of an Incentive Bonus, an employee must have actually worked a minimum of 400 hours in each Qualifying Fiscal Quarter, and not have sustained discipline of a suspension or higher. Authorized absences including vacation, legal holidays, and floating holidays shall be considered as “time worked” when computing actual hours worked.

**GOAL MONITORING AND MEASUREMENT**

Performance Goals will be monitored, measured, and reported in the San Francisco Municipal Railway “Services Standards” Quarterly Report.

**SENIOR MANAGEMENT AND SENIOR ADMINISTRATIVE CLASSIFICATIONS**

When more than one goal is achieved, the amount of Incentive Bonuses for “service-critical” senior level management and senior administrative classifications with multi-divisional or multi-mode responsibility will be determined by the General Manager in his/her sole discretion. Classifications so affected are identified for each goal.

**MAINTENANCE GROUP PERFORMANCE GOALS**

**GOAL #1:**

To assure that vehicles run on time according to published schedules (no more than 4 minutes late or 1 minute early) measured at terminals and established intermediate points.

**OVERALL GROUP GOALS**

FISCAL YEARS GOALS	OVERALL GOAL	QUARTER
July 1, 2001 – June 30, 2002	75%	
July 1, - September 30		65%
October 1, - December 31		65%
January 1, - March 31		70%
April 1, - June 30		75%
July 1, 2002 – June 30, 2003	80%	
July 1, - September 30		75%
October 1, - December 31		76%
January 1, - March 31	78%	
April 1, - June 30		80%

**MODE/DIVISION GOALS**

FISCAL YEARS	LRV	CABLE CAR	TROLLEY	DIESEL
July 1, 2001 – June 30, 2002				
July 1, - September 30		%	%	%
October 1, December 31		%	%	%
January 1, - March 31	%	%	%	%
April 1, - June 30		%	%	%
July 1, 2002 – June 30, 2003				
July 1, - September 30		%	%	%
October 1, - December 31		%	%	%
January 1, - March 31	%	%	%	%
April 1, - June 30		%	%	%

**GOAL #2:**

To increase vehicle miles between road calls by mode.

MODE GOALS

(July 1, 2001 – June 30, 2002)

MOTOR COACH:	Quarter Goals
Flynn-Artic	TBD
Woods	“ “
Kirkland	“ “
TROLLEY COACH	
Potrero Artic	“ “
Potrero Standard	“ “
Presidio Standard	“ “
RAIL	
Boeing Light Rail Vehicle	“ “
Breda Light Rail Vehicle	“ “
PCC	“ “
CABLE CAR	“ “

MODE GOALS

(July 1, 2002 – June 30, 2003)

MOTOR COACH:	Quarter Goals
Flynn-Artic	TBD
Woods	“ “
Kirkland	“ “
TROLLEY COACH	
Potrero Artic	“ “
Potrero Standard	“ “
Presidio Standard	“ “
RAIL	
Boeing Light Rail Vehicle	“ “
Breda Light Rail Vehicle	“ “
PCC	“ “
CABLE CAR	“ “

**GOAL #3:**

To reduce the total number days of unscheduled absences.\*

\*[Unscheduled Absences includes the following categories: Sick pay (with pay), Sick

Leave (without pay), AWOL, Workers Comp, SDI, and Assault Pay.]

Fiscal Years	Overall Goal	Quarter Goals
July 1, 2001 – June 30, 2002	5%	
July 1, - September 30		2%
October 1, - December 31		3%
January 1, - March 31		4%
April 1, - June 30		5%
July 1, 2002 – June 30, 2003	4%	
July 1, - September 30		1%
October 1, - December 31		2%
January 1, - March 31		3%
April 1, - June 30		4%

**GOAL #4:**

To reduce the total number of lost days due to industrial injury/illness.

Fiscal Years	Overall Goal	Quarter Goals
July 1, 2001 – June 30, 2002	5%	
July 1, - September 30		2%
October 1, - December 31		3%
January 1, - March 31		4%
April 1, - June 30		5%
July 1, 2002 – June 30, 2003	4%	
July 1, - September 30		1%
October 1, - December 31		2%
January 1, - March 31		3%
April 1, - June 30		4%

**OPERATIONS GROUP PERFORMANCE GOALS**

**GOAL #1:**

To assure that vehicles run on time according to published schedules (no more than 4 minutes late or 1 minute early) measured at terminals and established intermediate points.

**OPERATIONS GROUP GOALS**

FISCAL YEARS GOALS	OVERALL GOAL	QUARTER
July 1, 2001 – June 30, 2002	75%	
July 1, - September 30		65%
October 1, - December 31		65%
January 1, - March 31		70%
April 1, - June 30		75%
July 1, 2002 – June 30, 2003	80%	
July 1, - September 30		75%
October 1, - December 31		76%
January 1, - March 31	78%	
April 1, - June 30		80%

**MODE/DIVISION GOALS**

FISCAL YEARS DIESEL		LRV		CABLE CAR		TROLLEY
July 1, 2001 – June 30, 2002						
July 1, - September 30	%	%		%		%
October 1, December 31	%	%		%		%
January 1, - March 31	%	%	%	%	%	
April 1, - June 30	%	%		%		%
July 1, 2002 – June 30, 2003						
July 1, - September 30	%	%		%		%
October 1, - December 31	%	%		%		%
January 1, - March 31	%	%	%	%	%	
April 1, - June 30	%	%		%		%

**GOAL #2:**

To assure that scheduled service hours are delivered and scheduled vehicles begin service at the scheduled time.

**MODE GOALS**

(July 1, 2001 – June 30, 2002)



MOTOR COACH:	Quarter Goals
Flynn	97%
Woods	97%
Kirkland	97%

TROLLEY COACH

Potrero	97%
Presidio	97%

RAIL

Green	97%
Cable Car	97%

MODE GOALS

(July 1, 2002 – June 30, 2003)

MOTOR COACH:	Quarter Goals
Flynn	97.5%
Woods	97.5%
Kirkland	97.5%

TROLLEY COACH

Potrero	97.5%
Presidio	97.5%

RAIL

Green	97.5%
Cable Car	97.5%

**GOAL #3:**

To reduce the total number days of unscheduled absences.\*

\*[Unscheduled Absences includes the following categories: Sick pay (with pay), Sick Leave (without pay), AWOL, Workers Comp, SDI, and Assault Pay.]

Fiscal Years	Overall Goal	Quarter Goals
July 1, 2001 – June 30, 2002	10%	
July 1, - September 30		7%
October 1, - December 31		8%
January 1, - March 31		9%
April 1, - June 30		10%
July 1, 2002 – June 30, 2003	7%	

July 1, - September 30	4%
October 1, - December 31	5%
January 1, - March 31	6%
April 1, - June 30	7%

**GOAL #4:**

To reduce the total number of lost days due to industrial injury/illness.

Fiscal Years	Overall Goal	Quarter Goals
July 1, 2001 – June 30, 2002	5%	
July 1, - September 30		2%
October 1, - December 31		3%
January 1, - March 31	4%	
April 1, - June 30		5%
July 1, 2002 – June 30, 2003	4%	
July 1, - September 30		1%
October 1, - December 31		2%
January 1, - March 31	3%	
April 1, - June 30		4%

**ADMINISTRATION GROUP PERFORMANCE GOALS**

**GOAL #1:**

To assure that vehicles run on time according to published schedules (no more than 4 minutes late or 1 minute early) measured at terminals and established intermediate points.

ADMINISTRATION GROUP GOALS

FISCAL YEARS GOALS	OVERALL GOAL	QUARTER
July 1, 2001 – June 30, 2002	75%	
July 1, - September 30		65%
October 1, - December 31		65%
January 1, - March 31		70%
April 1, - June 30		75%
July 1, 2002 – June 30, 2003	80%	
July 1, - September 30		75%
October 1, - December 31		76%
January 1, - March 31	78%	
April 1, - June 30		80%

MODE/DIVISION GOALS

LRV	CABLE CAR	TROLLEY	DIESEL	FISCAL YEARS GOALS	OVERALL GOAL	QUARTER
				July 1, 2001 – June 30, 2002	75%	
				July 1, - September 30		65%
				October 1, December 31		65%
				January 1, - March 31	70%	
				April 1, - June 30		75%
				July 1, 2002 – June 30, 2003	80%	
				July 1, - September 30		75%
				October 1, - December 31		76%
				January 1, - March 31	78%	
				April 1, - June 30		80%

**GOAL #2:**

To reduce the total number days of unscheduled absences.\*

\*[Unscheduled Absences includes the following categories: Sick pay (with pay), Sick Leave (without pay), AWOL, Workers Comp, SDI, and Assault Pay.]

Fiscal Years	Overall Goal	Quarter Goals
July 1, 2001 – June 30, 2002	5%	
July 1, - September 30		2%
October 1, - December 31		3%
January 1, - March 31		4%
April 1, - June 30		5%
July 1, 2002 – June 30, 2003	4%	
July 1, - September 30		1%
October 1, - December 31		2%
January 1, - March 31		3%
April 1, - June 30		4%

**EXHIBITS**

**EXHIBIT A**

The following “service-critical” Job Classifications are covered under Maintenance Group Goals #1, #2, #3 and #4.

<b>CLASS</b>	<b>TITLE</b>
7412	Automotive Service Worker Asst. Sup

**EXHIBIT B**

The following “service-critical” Job Classifications are covered under Operations Group Goals #1, #2, #3 and #4.

<b>CLASS</b>	<b>TITLE</b>
9139	Transit Sup.
9140	Transit Manager I
9141	Transit Manager II
9150	Train Control Operator
9173	System Safety Inspector

**EXHIBIT C**

The following “service-critical” Job Classifications are covered under Administration Group Goals #1 and #2.

<b>CLASS</b>	<b>TITLE</b>
1773	Media Training Specialist

**MTA ATTENDANCE INCENTIVE PROGRAM  
(NON TRANSIT OPERATOR PERSONNEL)**

The following Attendance Incentive Program is established for non Transit Operator, “service-critical” employees at the Municipal Transportation Agency (MTA).

This MTA Attendance Incentive Program is available to “service-critical” personnel in Groups A and B as indicated on Exhibits A and B, and is offered separate and apart from any Wellness or Sick Leave “cash out” program the City may offer. The benefits of this program are not vested, and are only available to employees while in active employment status at the MTA. MTA employees who take employment in other City departments lose the benefits of this program upon the effective date of such non MTA employment.

**ANNUAL SICK LEAVE “CASH OUT”/TIME OFF OPTIONS**

If at the end of a “Qualifying Calendar Period” a full-time “service-critical” employee has not used more than a total of forty (40) hours (part-time “service-critical” employees twenty (20) hours) of sick leave, with or without pay, and or Disability Leave, and in addition has not been absent from work due to either Absence Without Leave (AWOL), leave without pay, or disciplinary suspension, may convert sick leave hours to “cash” or “time off” based on their accrued sick leave balance as shown below.

<b>FULL-TIME QUALIFYING BALANCE</b>	<b>GROUP A “CASH OUT”</b>	<b>GROUP B TIME OFF</b>
240 hours or more sick leave balance	40 hours	3 days
<b>PART-TIME QUALIFYING BALANCE</b>	<b>GROUP A “CASH OUT”</b>	<b>GROUP B TIME OFF</b>
120 hours or more sick leave balance	20 hours	2 days

Attendance Incentive Bonuses shall be paid to each qualifying employee no later than one (1) calendar month following the end of the Qualifying Calendar Period.

Employees in the groups eligible for the “time off” option shall be allowed to take their days off within ten (10) calendar months following the end of the Qualifying Calendar Period. The days off may be taken in single day increments or all at one time, subject to department/section scheduling.

NOTE: All sick leave hours “cashed out” or “taken off” shall be deducted from an employee’s total sick leave balance, however sick leave hours “cashed out” or “taken off” shall not count towards the forty (40) hours of sick leave used during the “Qualifying Calendar Period” above.

**QUALIFYING CALENDAR PERIOD**

For purposes of this Attendance Incentive Program a “Qualifying Calendar Period” is defined as follows:

July 1, 2001 – June 30, 2002  
July 1, 2002 – June 30, 2003

Sick leave hours “cashed out” shall be paid based on the employee’s “base hourly rate,” exclusive of any other premiums. The aforementioned incentive “cash out” premium shall not be considered as part of an employee’s compensation for the purpose of computing retirement benefits.

The following “service-critical” Job Classifications are covered under the “Cash Out” option of the Attendance Incentive Program.

**GROUP A**

<b>CLASS</b>	<b>TITLE</b>
7412	Automotive Service Worker Asst. Sup
9139	Transit Sup.
9140	Transit Manager I
9141	Transit Manager II
9150	Train Control Operator

**GROUP B**

The following “service-critical” Job Classifications are covered under the “Time Off” option of the Attendance Incentive Program.

<b>CLASS</b>	<b>TITLE</b>
1773	Media Training Specialist
9173	System Safety Inspector

## **APPENDIX B: PAST PRACTICES – MTA**

1. Vacation sign ups shall be conducted by the end of January of each year for that calendar year unless important operational concerns require a delay. Seniority shall be based on date of hire with the City. When more than one employee has the same hire date with the City, the date of hire in the classification and the position on the civil service list shall determine the order for sign up.
2. Employees requesting 6<sup>th</sup> day of work on RDO will be given priority in the same group over employees requesting 7<sup>th</sup> day of work.
3. Coveralls will be provided to street inspectors upon request when required to work on or under vehicles.
4. Central Control Dispatchers will be entitled to one (1) forty five (45) minute break during an eight (8) hour shift. Breaks will be scheduled on the needs of service and staggered throughout the day.
5. Central Control Dispatchers will be entitled to one (1) twenty (20) minute break after each four (4) hours of overtime worked.
6. Central Control Dispatchers rotate their consoles on a weekly basis.
7. Employees returning to class 9139 from a promotive class will go in place on the relief board in their previous unit. The returning employee will maintain his/her sign up seniority if he/she returns within a one-year time limit.
8. Any time off work will be counted as a refusal to work overtime, for the purpose of computing overtime rotation.
9. Street Inspectors may have their mail delivered to their corners upon request.
10. Street Inspectors assigned City vehicles that are shared by more than one shift are allowed to leave their assigned districts fifteen (15) minutes early for travel time to return to the vehicle pool location.
11. Street Inspectors will be allowed to take break between calls, except during rush hours and delays, upon notification and approval of Central Control.
12. The duration of short term reassignments will be defined during the meet and confer process for sign ups and be included in the sign up bulletin.
13. In the Safety and Training Department the lead instructor for new operator classes will be rotated.
14. Regularly occurring special assignments will be included as part of the shift details prepared for the sign up bulletin.



**APPENDIX C: PAST PRACTICES –  
OFFICE OF THE THE CITY ATTORNEY**

Emergency response shall be rotated among those Class 9155 Claims Investigators responsible for MUNI related investigations.

## **APPENDIX D**

### **EMPLOYEE ASSISTANCE PROGRAM AND PEER COUNSELING PROGRAM**

Transport Workers Union Locals 250A and 200, Automotive Mechanics Local 1414, Teamsters Local 853, International Brotherhood of Electrical Workers Local 6, Laborers Union Local 261, Service Employees International Union Local 790, Stationary Engineers Local 39, and Glazier and Glass Workers, Local 718, and the Municipal Transportation Agency (“MTA”) hereby agree to create an Employee Assistance Program as follows:

#### **A. OVERVIEW OF EAP PROGRAM**

This Employee Assistance Program (“EAP”) shall cover employees only, and is designed to assist employees, in consultation with their families where clinically appropriate, with problems that may affect their ability to perform their jobs. The EAP shall offer counseling services, including assessment, referral, and follow-up services.

EAP’s offer assistance by helping employees assess and identify problems arising from a variety of personal areas.

EAP’s assist employees by referring them to services which lead to solutions.

EAP’s provide training and consultation services to management and union leadership regarding assisting troubled employees.

The primary goal of the EAP will be to maintain employee’s ability to be fully productive on the job. EAP’s help employees, management, and supervisors maintain a high level of service by:

Motivating employees to help;

Helping supervisors identify troubled employees with job performance problems that may be related to personal problems;

Assessing employees with alcohol abuse, drug abuse, family problems, depression, stress and other problems that can result in performance problems;

Providing easily accessible quality helping services which include short-term problem-solving and referrals to more intensive care;

Providing crisis intervention services;

Providing follow-up assistance to support and guide employees through the resolution of their problems; and by

Acting as an education and training resource.

Employees shall be able to access the EAP through calling directly (self-referral), through the Peer Assistants, or through a supervisory referral based on job performance. Participation in the EAP is voluntary.

Establishing a voluntary EAP to compliment the mandatory testing program is intended to encourage employees to seek treatment early and on their own. The EAP will assist employees in obtaining information, guidance, and counseling to help them handle their problems before they become a drug testing or disciplinary issue.

An outside vendor has been selected and will perform the following duties:

- Maintain a toll-free telephone access for referrals and respond to calls in no more than sixty (60) seconds.
- Provide union/management consultation relative to the development and integration of organizational policies and procedures necessary for effective Employee Assistance Program implementation.
- Orient employees regarding the purpose, scope, nature and use of the Employee Assistance Program.
- Train Union (including Division Chairpersons and any other Union officials), supervisory and management staff to develop the knowledge and skills necessary to effectively utilize the program in the performance of their responsibilities.
- Provide direct one-to-one counseling utilizing licensed professional staff for crisis management and to identify and evaluate personal concerns among Employer's employees and/or their immediate dependents. Such direct counseling shall provide for three (3) sessions per family per year. Fees for any counseling sessions exceeding three (3) will become the financial responsibility of the employee and/or dependent, unless otherwise arranged for by the employer. For non-urgent situations, an appointment will be offered within seventy-two (72) hours of request. For urgent situations, an appointment will be offered on the same day as the request for service.
- Provide legal consultation, medical advice, financial consultation; one (1) consultation per incident is provided for each service, up to three (3) incidents per service, per year.
- Provide referral services to professional community resources for treatment and/or assistance, as may be appropriate.
- Provide continuing liaison and contact, when appropriate, between the employee, treatment agent or agency, and Employer to determine case status.
- Provide monthly statistical evaluation of program activity, and other reports, as needed.
- Send its principal or his designated representative to monthly meetings of the Municipal Railway Improvement Fund Board of Trustees, and any other meetings as reasonably required.
- Assess all employees involved in Critical Incidents (e.g., on the job assaults, threats and/or accidents) that occur while on duty.
- Provide up to three (3) counseling visits per employee involved in a Critical Incident.
- Develop Critical Incident Program Policies and Procedures.
- Provide Critical Incident Case management, including:
  - (a) Determination regarding an employee's ability to perform duties, including coordination with management and union personnel for employees who require time off work as a result of a Critical Incident;
  - (b) Assisting employees in securing additional counseling visits beyond the three (3) Critical Incident/trauma response visits described above, when necessary.

## B. ORGANIZATION

### (1) The Joint Labor-Management Committee:

- (a) Membership and Meetings: Five (5) Committee members and two (2) alternate members to be appointed by the Unions. Five (5) Committee members to be appointed by the City.

If the City chooses to appoint less than five persons, it shall still have voting strength equal to that of the Unions. On the matters that come before the Committee, the City shall have one vote and the Unions shall have one vote. The vote of each side shall be controlled by the votes of the Committee members present for each respective side.

The Committee shall elect from its ranks a Chairperson and a Co-Chair, one of whom shall be a City appointee and the other the Unions' appointee. The Chair shall be held by one side for a year, then relinquished to the other side for the next year. Either the City or the Unions may replace their named Chair or Co-Chair at any time. The Chair shall preside over meetings of the Committee. In the absence of the Chair, the Co-Chair shall so preside. The MTA General Manager shall provide staff support to the Committee as appropriate.

A quorum for the transaction of business by the Committee shall consist of three (3) Union Committee members and a majority of the City-appointed Committee members.

- (b) Functions: To receive and review information regarding the Substance Abuse and Peer Assistance Programs.
- (c) Consolidation of Committees: The parties to this Agreement and to the Agreement concerning drug and alcohol testing and EAP between TWU Local 250A and the MTA may elect to combine the joint labor-management committee established here and in the Local 250A Agreement.

### (2) Substance Abuse Program:

The MTA General Manager or designee will manage all aspects of the FTA-mandated Substance Abuse Program. He/she shall have appointing and removal authority over all personnel working for the Substance Abuse Program personnel, and shall be responsible for the supervision of the SAP.

### (3) EAP Services:

The City and the Unions have concluded that it is in the best interests of all concerned to establish a uniform EAP Program for all employees. On this basis, the parties agree that the City shall engage an outside contractor to provide these services.

### (4) The Peer Assistance System:

(a) Structure:

The outside contractor selected to provide EAP services shall also be directly responsible for the clinical and administrative management of the Peer Assistance Program. This Program shall be established on a 24-hour, seven-day a week basis. The peer assistants shall provide coverage during regular business hours (Monday - Friday, 8:30 a.m. - 5:00 p.m.) for all Muni worksites or sections. A system-wide EAP crisis hotline shall be established. Night, weekend and holiday crisis coverage shall be provided by one of the peer assistants and shall be rotated among the peer assistants, who shall be available on a pager. The full compensation of the Peer Assistant providing such night, weekend and holiday coverage shall be pager pay. Pager pay will not be provided for regular daily coverage.

(b) Peer Assistance Oversight Committee:

This Committee, composed of one representative from Locals 250A, 200, 6, 790 and 1414, shall be responsible for trouble-shooting and making decisions on program operations.

(c) MTA Liaison:

The MTA Liaison shall be an individual designated by the MTA General Manager to serve as the City's emissary in matters such as labor relations and administrative issues.

(d) Qualifications:

- A MUNI employee who has previous counseling experience or is interested in peer counseling and is willing to make a two year commitment to pursue training and education toward certification as a drug and alcohol counselor  
OR
- A MUNI employee who was a former substance abuser who has been clean and sober for a least two years and who continues to participate in a twelve step program  
OR
- A MUNI employee who has had experience with family members' substance abuse and who had participated in a self-help group for co-dependency  
AND
- A MUNI employee who is respected by their peers, the union, and the management  
AND
- A MUNI employee who is committed to the goals of the Peer Assistance Program

(e) Duties:

- Assist employees in accessing the Voluntary Substance Abuse Program and EAP.
- Provide on-going support and case management for clients in the Voluntary Substance Abuse Program.
- Abide by state and federal confidentiality laws.
- Publicize the EAP verbally and through distribution of literature.

- Provide employees with information regarding the EAP and Voluntary Substance Abuse programs and create a forum for employees to discuss their concerns.
- Assist in publication of Voluntary Substance Abuse Program newsletter.
- Seek out opportunities to participate in training programs to further develop knowledge and skills.
- Develop and implement new ideas to increase utilization and maximize the effectiveness of the EAP and Voluntary Substance Abuse Programs.
- Develop and maintain a professional environment in which to interact with clients.
- Develop a group of volunteers in the divisions to support the goals of the EAP and Voluntary Substance Abuse Programs.
- Assist in education and training sessions for new and existing employees.
- Keep accurate records of client contacts and promotional activities.

(f) Staffing:

There shall be a clinician employed by the outside contractor for EAP Services who will be on-site a minimum of 20 hours a week. The clinician shall report directly to the outside contractor, Peer Assistance Oversight Committee and the MIF liaison. There shall be three full-time Peer Assistants reporting to the outside contractor.

(g) Volunteer Peer Assistants:

1. Up to eight (8) Volunteer Peer Assistants.
2. Assist peer assistants upon request during their off-duty time.
3. They shall participate in designated training.
4. Their activities shall be within the limits of their training.
5. Volunteer peer assistants will receive no compensation for their services.

(h) Functions:

The outside contractor, in consultation with the Peer Assistance Oversight Committee, shall develop procedures for the Peer Assistance Program.

(i) Civil Service Commission Approval:

The use of peer assistants shall be subject to the approval of the Civil Service Commission.

**C. PAY STATUS DURING VOLUNTARY SELF-REFERRAL TREATMENT (VOLUNTARY SUBSTANCE ABUSE PROGRAM)**

- (1) An employee who has a drug and/or alcohol abuse problem and has not been selected for drug and/or alcohol testing can voluntarily refer him/herself to the EAP for treatment. The EAP will evaluate the employee and make a specific determination of appropriate treatment. An employee who has completed two rehabilitation programs may not elect further rehabilitation under this program.

- (2) In the case of the up to two voluntary, employee-initiated referrals, the MTA will pay the employee the difference between his/her SDI benefits, use of accrued paid leaves, and any catastrophic illness benefits, and the employee's regular hourly base pay, for up to the eight hours per day for full-time employees and up to three hours per day for part-time employees, up to a maximum of 21 work days during a five-year period. This provision shall not apply in the event the employee does not receive SDI benefit payments or during the follow-up period established by the SAP after a positive test.

**D. NON-PAID STATUS DURING TREATMENT AFTER POSITIVE TEST**

The employee will be in a non-pay status during any absence for evaluation or treatment, while participating in a rehabilitation program.

**E. EDUCATION AND TRAINING**

The foundation of this Program is education and voluntary compliance. It is recognized that alcohol and chemical dependency may make voluntary cessation of use difficult, and one of the Program's principal aims is to make voluntary steps toward ending substance abuse easily available.

The outside contractor shall review and develop on-going educational and training information on the adverse consequences of substance abuse and the responsibility to avoid being under the influence of alcohol or chemicals at work. Certain training required by the DOT Regulations shall be the responsibility of the Substance Abuse Program.

**F. CONFIDENTIALITY**

Participation in the EAP shall be confidential and shall be conducted in accordance with DOT and DHHS standards.

**G. FUNDING**

The Employee Assistance Program and the Peer Assistance Oversight Committee shall be funded by the City.

**H. SPECIAL PROVISIONS**

Any proposed discipline resulting from the FTA Drug and alcohol testing program shall be in accordance with the MOU's, as amended June 12, 1995. The MTA and the City recognize the rights of employees and/or the Unions, who may consider themselves aggrieved by any discipline proposed, to raise such grievance through the authorized grievance procedure. The MTA General Manager will act in a fair and equitable manner, and shall prescribe that no personnel hired, contracted, selected or directly involved in the drug and alcohol testing program shall propose or render discipline.