

**Proposed Changes for the
Personnel and Salary Resolution (PSR) FY 2017-18**

ATTACHMENT C

Subject	Page	Section	Proposed Change	Reason
Various grammatical & formatting changes				Throughout document
Purpose of Personnel and Salary Resolution	1	1.1	Move language	Language from section 1.2 moved to section 1.1
Human Resources Policies and Procedures	1	1.2	Move Language	Language from section 1.2 moved to section 1.1
At-Will Employment	2	2.1	Add language	Employees are not required to give notice to terminate employment
Relocation Expenses	3	2.7	Policy Change	No change to PSR language, however the eligibility for reimbursement will shrink from 100 miles outside OCTA HQ to 75. Also, CEO will be given the discretion to make exceptions to the policy. In addition, any expenses beyond \$20,000 will be brought to F&A Committee. Note: this is a discretionary benefit
Exempt and Non-Exempt Employee, Workweek, Schedules, Overtime and Make-up Time	5	3.0	Change title of section to incorporate new sections	Added new sections
Exempt Employees	5	3.1	Add section	Added definition from Workweek and Overtime Policy (this section was moved in a previous version of the draft after the section was added)
Non-Exempt Employees	5	3.2	Add section	Added definition from Workweek and Overtime Policy (this section was moved in a previous version of the draft after the section was added)
Workweek	6	3.3	Separate Overtime section from Workweek section and add definition of workweek	Added definition of Workweek from Workweek and Overtime Policy and create separate section for Overtime
Alternative Work Schedules	6	3.4	Move section; add language	Moved from section 3.1
Overtime	7	3.5	Move section; add language	Moved from section 3.2 and added language from Overtime and Workweek Policy. Deleted repetitive language
Make-up Time	8	3.6	Add section	Make-up time already allowed under state law
Grandfathered Retirement	10	4.2B	Delete language	Change has already occurred and historical language is being deleted
Health Insurance	11	4.3A	Reorganize section; add language	Reorganized and added language to clarify existing policy

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Subject	Page	Section	Proposed Change	Reason
Continuation of Health Benefits for Retirees	13	4.3F	Rename section and add language	Renamed the section for accuracy and clarified percentage of premium
Employee Recreation Association	13	4.4A	Add language	Added an explanation of the ERA and their purpose
Employee Use of Transportation System	13	4.4B	Add reference to policy	Added reference to relevant policy
Personal Leave	15	4.5A	Add and delete language	Added, deleted and moved language to clarify existing policies
Educational Reimbursement Program	16	4.6B	Add language	Added language to clarify existing policy; added language that benefit will be indexed to CSUF tuition up to the IRS tax free amount, consistent with Board approval in Fiscal Year 2016 budget
Tablet Purchase Reimbursement Program	17	4.6C	Add reference to policy	Added reference to relevant policy
Uniforms	18	4.6D	Add language	Added language to clarify existing policy
Deferred Compensation	18	4.7A	Add language; change schedule for matching contributions	Added language as a result of internal audit; changed matching schedule so employees receive 1% match at new hire, 2% at the beginning of 5 years and 3% at the beginning of 10 years
Retirement	20	4.7B	Delete language	Change has already occurred and historical language is being deleted
Accruals	21	4.8A	Add language	Added language to clarify existing policy
Bereavement Leave	21	4.8B	Add language	Added language to clarify existing policy
Catastrophic Leave	21	4.8C	Add/delete language	Added and deleted language to clarify upcoming policy change
Holidays and Personal Paid Holidays	21	4.8D	Add 1 PPH; add language for non-exempt employees on alternate works schedules	Proposal to add 1 additional Personal Paid Holiday for a total of 12 holidays. Non-exempt employees who work an alternate work schedule (not a standard 8 hour day) would no longer be required to supplement their holiday with vacation time
Sick Leave – Full-Time and Part-Time Employees	22	4.8F	Add language	Added language to comply with state law

**Proposed Changes for the
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Subject	Page	Section	Proposed Change	Reason
Sick Leave Sellback	24	4.8G	Add language	Added language to clarify existing policy
Administration of Compensation	28	5.2	Delete language	Deleted language for consistency with Deferred Compensation Plan document
Newly Hired/Promoted Employees	28	5.3	Add/consolidate language	Added language to clarify/memorialize existing policy; Consolidated section 5.6 on promotions with this section
Merit Adjustments	29	5.6	3.5% merit increase	Proposed 3.5% merit increase
Special Performance Awards	30	5.7	3% Special Performance Award; add language	Proposed 3% Special Performance Award; add language to clarify/memorialize existing policy that no employee will receive over 6% of their total salary in Special Performance Awards, per fiscal year
Changes to Salary Grades Min/Mid/Max	32		2% Salary Range Increase	Proposed 2% salary range adjustment
Job Classifications Moving to Different Salary Grades	32			Human Resources compensation market review and analysis recommended specific classifications be moved to different salary grade; others are new titles proposed in the budget

PERSONNEL AND SALARY RESOLUTION

FISCAL YEAR 201~~7~~6-201~~8~~7

Effective: June ~~25~~12, 201~~7~~6

This document provides information on general policies regarding employment practices, employee benefits, compensation and salary structure for administrative employees at the Orange County Transportation Authority and was approved by the Orange County Transportation Authority Board of Directors on June ~~12~~3, 201~~7~~6

Prepared by:

Human Resources ~~Department~~ and Organizational Development Division



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SECTION 1 PURPOSE AND PROCEDURES

1.1 PURPOSE OF PERSONNEL AND SALARY RESOLUTION

In an effort to establish an equitable and consistent plan for managing Human Resources matters, to attract, develop and retain top talent, and to ensure consistent selection, promotion, and compensation practices based on merit, ability, and performance, the following Human Resources policies for administrative employees are hereby adopted.

The Orange County Transportation Authority (OCTA) reserves and maintains the right to eliminate, modify or otherwise change, at any time, for any reason, any provision(s) of this Personnel and Salary Resolution (PSR), as established and approved by the Board of Directors, including, but not limited to, any employee benefit or right provided in this PSR Personnel and Salary Resolution.

1.2 HUMAN RESOURCES POLICIES AND PROCEDURES

The Chief Executive Officer (CEO), acting as the Appointing Authority (AA), may elect to delegate certain responsibilities. The CEO is charged with ensuring OCTA Human Resources policies and procedures provide for an effective and efficient organization, staffed with qualified employees receiving fair and equitable treatment. The Executive Director of Human Resources and Organizational Development (HROD) is responsible for managing the Human Resources functions and is responsible for developing and administering Human Resources policies and procedures that are in the best interest of OCTA and its employees.

The CEO makes the final determination on the interpretation of OCTA Human Resources policies ~~as established by the Board of Directors~~ and is authorized to establish and maintain Human Resources procedures that are consistent with those policies.

Exceptions to the ~~PSR Personnel and Salary Resolution~~ may be authorized in writing by the CEO. This exception authority may not be delegated.

Please refer to specific policies and procedures for additional information.

SECTION 2 EMPLOYMENT

2.1 AT-WILL EMPLOYMENT

OCTA employees whose employment is governed by the provisions of this ~~PSR~~Personnel and Salary Resolution are at-will. The ~~Appointing Authority~~AA has the right to reassign, dismiss, reduce pay, or suspend without pay any employee, at any time, for any reason. Similarly, OCTA employees may terminate their employment at any time without prior notice.

2.2 APPROVAL AUTHORITY FOR EMPLOYEE ACTIONS

The CEO is the ~~Appointing Authority~~AA for the selection and termination of all employees in all positions except those reporting directly to the Board. The CEO is authorized to approve revisions in classification titles and grades, provided that any such changes are in accordance with established OCTA Policies and Procedures and the Board-adopted fiscal year budget.

2.3 COMPENSATION

OCTA will maintain a compensation philosophy and salary structure for full-time and part-time employees as stated in the ~~PSR~~Personnel and Salary Resolution.

Salary ranges, rates, and employee benefits are reviewed and considered for adjustment not less often than annually. This permits OCTA an opportunity to periodically assess the competitiveness of the compensation plan, including the salary structure, and make necessary adjustments to reflect changes in internal equity and labor market conditions.

2.4 INTERNSHIPS

A person employed in a College Intern position is considered an employee in an extra-help classification and will be compensated at an hourly rate to be determined by the ~~Appointing Authority~~AA. A College Intern is not eligible for employee benefits paid by OCTA, except as required by law.

2.5 OUTSIDE EMPLOYMENT ACTIVITIES

An administrative employee may not engage in outside employment or other outside activities incompatible with the full and proper discharge of the duties and responsibilities

of his/her OCTA employment. Before accepting or engaging in any outside employment, an employee must obtain written permission from the Appointing AuthorityAA.

2.6 PERFORMANCE PLANNING AND REVIEW PROGRAM

The Appointing AuthorityAA is responsible for developing and administering a formal performance planning and review program for all full-time and part-time administrative employees.

2.7 RELOCATION EXPENSES

OCTA may provide relocation assistance as defined in the “Reimbursement of Relocation Expenses Policy.”

2.8 ELIMINATION OF POSITIONS AND WORKFORCE REDUCTIONS

Whenever it becomes necessary, the CEO may eliminate any position. The CEO has the authority to reduce the workforce and to layoff full-time or part-time employees because of the elimination of a position, lack of funds, lack of work, or for operational efficiencies. An employee who is laid-off because of the elimination of a position or reduction in the workforce may be placed in another position for which the employee is qualified at the same level or below, provided an opening exists. Workforce reductions may allow for the position to remain vacant until the Appointing AuthorityAA finds it necessary to fill the position.

2.8A LAYOFF BENEFITS

An employee recalled within six ~~(6)~~ months may be reinstated to the same position if the position is available. For purposes of this section, benefits based on length of service will be reinstated to the level prior to layoff if an employee is reinstated to the same or a different position within six ~~(6)~~ months following the date of layoff.

An employee placed on layoff may be granted paid health insurance in accordance with the following schedule:

Years of Service	Length of Coverage
Less than 3	1 month
3 but less than 5	2 months
5 but less than 10	3 months
10 or more	4 months

Upon termination from OCTA due to layoff, all unused or unpaid vacation, personal paid holidays, and sick leave will be paid to the affected employee.

2.8B LAYOFF SEVERANCE PAY

The CEO may authorize the payment of severance pay to full-time and part-time employees in accordance with the following schedule:

Years of Service	Weeks of Severance Pay
Less than 3	2 weeks
3 but less than 5	3 weeks
5 but less than 10	4 weeks
10 or more	5 weeks

Severance pay for part-time employees is ~~prorated calculated~~ in accordance with their regularly scheduled ~~ds~~ pay.

2.9 GRIEVANCE PROCEDURE

The ~~Appointing Authority~~AA may establish and be responsible for the maintenance of a grievance procedure for use by administrative employees.

SECTION 3

EXEMPT AND NON-EXEMPT EMPLOYEE-, WORKWEEK, SCHEDULES, -AND OVERTIME AND MAKE-UP TIME

3.13 EXEMPT EMPLOYEES

Those employees in positions that are not covered under the provisions of the Fair Labor Standards Act (FLSA) regarding minimum wage, overtime, maximum hours and recordkeeping.

An exempt employee, either part-time or full-time, is not eligible for overtime payment, compensatory time or any additional compensation for time worked in excess of eight hours per day or 40 hours per workweek or time worked in excess of his/her regular schedule.

Sick leave and vacation accruals, as well as retirement service credits, accrue on paid hours excluding overtime.

3.24 NON-EXEMPT EMPLOYEES

Those employees in positions that are covered under the provisions of the Fair Labor Standards Act (FLSA) regarding minimum wage, overtime, maximum hours and recordkeeping. All hours worked, holidays, and benefit time taken must be accurately recorded on a timesheet and approved by the supervisor. Sick leave and vacation accruals, as well as retirement service credits, accrue on paid hours excluding overtime.

Non-exempt employees are strictly prohibited from volunteering or donating their time to OCTA by performing any work or function that is the same or similar to their regularly scheduled duties while in an unpaid status.

.1 — ALTERNATIVE WORK SCHEDULES

~~The Appointing AuthorityAA has the authority to designate flexible starting, ending, and core times for the performance of work during the standard workday consistent with OCTA's "Workweek and Overtime Policy."~~

~~The Appointing AuthorityAA also has the authority to designate alternative workweek schedules, such as 4/10 or 9/80, provided the administration of such schedules is consistent with OCTA policy and any applicable state and federal laws.~~

~~The Appointing AuthorityAA may establish necessary guidelines to administer alternative workweek schedules at the department and section level.~~

~~3.312~~ WORKWEEK AND OVERTIME

The Fair Labor Standards Act (FLSA) defines workweek as a period of 168 hours consisting of seven ~~(7)~~ consecutive 24 hour periods. The employer can determine the day and hour that the workweek begins. Each workweek is considered on its own to determine minimum wage and overtime payments: there is no averaging of two ~~(2)~~ or more workweeks. The Department of Labor uses workweek to determine compliance with federal regulations such as requirements for wage payments and overtime. Workweek and overtime will be administered consistent with any applicable state and federal laws.

The regular work ~~week period~~ for a full-time OCTA employee is 40 hours per week, ~~Sunday through Saturday, unless otherwise established with an alternative work schedule. The workweek does not need to coincide with the calendar week.~~

~~3.42~~ ALTERNATIVE WORK SCHEDULES

~~The AA has the authority to designate flexible starting, ending, and core times for the performance of work during the standard workday consistent with OCTA's "Workweek and Overtime Policy."~~

~~The AA also has the authority to designate alternative workweek schedules, such as 4/10 or 9/80, provided the administration of such schedules is consistent with OCTA policy and any applicable state and federal laws.~~

~~The AA may establish necessary guidelines to administer alternative workweek schedules at the department and section level.~~

~~3.3~~ EXEMPT EMPLOYEES

~~Those employees in positions that are not covered under the provisions of the Fair Labor Standards Act (FLSA) regarding minimum wage, overtime, maximum hours and recordkeeping.~~

~~An exempt employee, either part time or full time, is not eligible for overtime payment, compensatory time or any additional compensation for time worked in excess of eight hours per day or 40 hours per workweek or time worked in excess of his/her regular schedule.~~

~~Sick leave and vacation accruals, as well as retirement service credits, accrue on paid hours excluding overtime.~~

~~3.4 NON-EXEMPT EMPLOYEES~~

~~These employees in positions that are covered under the provisions of the Fair Labor Standards Act (FLSA) regarding minimum wage, overtime, maximum hours and recordkeeping. All hours worked, holidays, and benefit time taken must be accurately recorded on a timesheet and approved by the supervisor. Sick leave and vacation accruals, as well as retirement service credits, accrue on paid hours excluding overtime.~~

~~Non-exempt employees are strictly prohibited from volunteering or donating their time to OCTA by performing any work or function that is the same or similar to their regularly scheduled duties while in an unpaid status.~~

3.5 OVERTIME

Overtime must be authorized prior to performance of such work. Authorized work performed in excess of eight ~~(8)~~ hours per day or in excess of 40 hours per workweek by a full-time or part-time non-exempt employee is considered overtime.

This ~~definition~~ does not apply to a non-exempt employee who regularly works a 9/80 work schedule or who regularly works any other work schedule totaling 40 hours per workweek. All paid hours except sick time will be considered hours worked.

~~For a non-exempt employee on an alternative work schedule, authorized work performed in excess of the regularly scheduled hours per day or in excess of 40 hours per workweek is considered overtime.~~

Excluding employees on an alternative work schedule, non-exempt employees will be paid 1-1/2 times their regular rate for all time worked in excess of eight ~~(8)~~ hours in a workday or 40 hours in a workweek. Non-exempt employees on alternative work schedules will be eligible for daily overtime for hours worked in excess of their regular schedule or 40 hours in a workweek.

For purposes of calculating overtime compensation, paid holidays not worked and pre-approved vacation not worked are treated as authorized work performed. If a designated holiday occurs on a regularly scheduled day off, these hours are not considered hours worked. Hours away from work due to illness, even when compensated, are not included in overtime calculations. ~~Overtime must be authorized prior to performance of such work.~~

A non-exempt employee who is required to work on a designated holiday will be paid 1-1/2 times his/her regular rate for authorized work performed, in addition to regular holiday pay. Added pay for holiday hours worked will not be considered when calculating overtime on more than 40 hours in a workweek.

OCTA does not permit the accrual of compensatory time in lieu of payment of overtime.

In no case may a non-exempt employee's work-week be changed when the purpose of the change is to avoid compensating the employee at 1-1/2 times his/her regular rate for work performed in excess of his/her regular work schedule.

If, in the judgment of the ~~employee's supervisor, Appointing AuthorityAA, w~~ Work beyond the normal workday, workweek, or work period is required, such work may be authorized.

3.6 MAKE-UP TIME

~~Consistent with OCTA policy, w~~When a non-exempt employee requests to leave or miss certain hours of a day and then to make it up by working longer hours on another day, it is called make-up time.- Make-up time is permitted when requested by the employee due to the employee's personal obligation. The employee must request to use make-up time in writing before taking the time off or working the make-up hours, and the supervisor must approve it. The time must be made up within the same workweek as the time that was taken off. The made-up time cannot cause the employee to work more than eleven (11) hours in a day or more than forty (40) hours in a workweek, as this will require overtime to be paid. EmployersManagers and/or Supervisors are prohibited from encouraging or soliciting an employee to request make-up time.

~~An exempt employee, either part time or full time, is not eligible for overtime payment, compensatory time or any additional compensation for time worked in excess of eight (8) hours per day or 40 hours per workweek or time worked in excess of his/her regular schedule.~~

~~Sick leave and vacation accruals, as well as retirement service credits, accrue on paid hours excluding overtime.~~

SECTION 4 EMPLOYEE BENEFITS

4.1 BOARD MEMBER BENEFITS

The Appointing Authority may establish and be responsible for health (medical, dental, and vision), and life (life and accidental death and dismemberment) insurance benefits for Board Members at a cost not to exceed the amount established by the Board in the annual budget.

4.1A BENEFITS ELIGIBILITY

For Public Board Members and for Board Members who do not receive health benefits from the public entity they are elected to serve: The Board Members will have the same premium cost and the same health benefits as full-time employees paid by OCTA, which may change to reflect the current programs offered.

For Board Members who receive health benefits from the public entity they are elected to serve: The Board Members may choose to receive the same health benefits as full-time employees, provided the Board Member pays 100 percent of the OCTA premium, which may change to reflect the current programs offered.

4.1B DEFERRED COMPENSATION

Board Members may participate in OCTA's Deferred Compensation Program.

4.1C RETIREMENT PLAN

Board Members are required to participate in the 3121 Federal Insurance Contributions Act (FICA) Alternative plan, because they are not eligible to participate in the Orange County Employee Retirement System. Board Members contribute 7.50 percent of OCTA pay. The 3121 FICA Alternative plan is required under the Omnibus Budget Reconciliation Act (OBRA) and is administered by a third party administrator.

4.1D LIFE INSURANCE AND SUPPLEMENTAL LIFE INSURANCE

Life Insurance will be provided by OCTA in the amount of \$50,000 coverage for each Board Member.

Voluntary Board Member-paid supplemental life insurance may be offered by OCTA for Board Members and/or their dependents.

4.1E REIMBURSEMENT OF EXPENSES

OCTA will reimburse Board Members for actual and necessary expenses incurred in the performance of their duties, as provided in the “Policy for Compensation, Reimbursement of Expenses and Mandatory Ethics Training for Members of the Board of Directors.”

4.2 GRANDFATHERED BENEFITS

The following exceptions to policy as otherwise outlined in this Personnel and Salary Resolution PSR result from the consolidation of the Orange County Transit District and the Orange County Transportation Commission.

The following benefits apply only to those employees who were employees of the Orange County Transportation Commission, as of June 19, 1991.

4.2A GRANDFATHERED LEAVE

Each non-exempt employee covered under this section will be entitled to 16 hours of paid Administrative Leave per fiscal year. Each exempt employee covered under this section will be entitled to 32 hours of paid Administrative Leave per fiscal year.

Approval will be by the appointing Authority AA. Any unused Administrative Leave for the current fiscal year will be paid to the employee in the event of termination or retirement. The maximum accrual amount for non-exempt employees will be 24 hours. The maximum accrual amount for exempt employees will be 48 hours.

4.2B GRANDFATHERED RETIREMENT

An employee covered under this section may continue to participate in the California Public Employees’ Retirement System and shall be governed by its rules and regulations.

~~Commencing January 1, 2016, employees shall pay 75 percent of the employee contribution. OCTA will pay the share of the employee contribution that is not paid by the employee.~~ Commencing January 1, 2017, employees shall pay 100 percent of the employee contribution.

4.3 HEALTH, LIFE, AND DISABILITY INSURANCE BENEFITS

4.3A HEALTH INSURANCE

The ~~Appointing Authority~~^{AA} will offer health (medical, dental, and vision), life (life and accidental death and dismemberment), and disability insurance programs for all full-time and part-time employees as determined by the Board.

~~4.3A FULL-TIME EMPLOYEES~~

~~Full time~~ ~~E~~employees who are scheduled to work a minimum of ~~30-20~~ hours per week or more and meet the criteria under the Affordable Care Act, are eligible to participate in the health, life and disability insurance programs on the first day of the month following 30 days of employment. Employees may be required to pay a portion of the premiums. Part-time employees will pay the same portion of the premiums as full-time employees.

~~Full time~~ Administrative and TCU employees who elect to waive an OCTA medical, dental and vision plan are eligible to receive an employer contribution of \$92.31 per pay period into a 401(a) deferred compensation plan, not to exceed the annual IRS maximum contribution. The employee must provide verification annually from the employer or the insurance carrier which verifies proof of other medical plan coverage in order to receive a contribution into the 401(a) plan. An employee who is a spouse, child or any other dependent of an OCTA Administrative/TCU employee is not eligible if he/she is covered under an OCTA medical, dental or vision plan.

~~4.3B PART-TIME EMPLOYEES~~

~~Part time employees who are scheduled to work less than 30 hours per week are eligible to participate in the health, life, and disability insurance programs on the first day of the month following 30 days of the employment. Part-time employees will pay the same portion of the premiums as full-time employees.~~

4.3~~BC~~ LIFE INSURANCE AND SUPPLEMENTAL LIFE INSURANCE

Life insurance will be provided by OCTA to full-time and part-time employees in the amount of two ~~(2)~~ times the annual salary. Voluntary employee-paid supplemental life insurance may be offered by OCTA for employees and/or eligible dependents (IRS).

4.3~~CD~~ DISABILITY INSURANCE

Employer-paid short-term disability ~~(STD)~~ and long-term disability ~~(LTD)~~ insurance programs will be provided to full-time and part-time employees. Employees may be

eligible for benefits under short-term disability~~STD~~ and/or long-term disability~~LTD~~ once sick leave is exhausted. Coordination of state provided disability payments may be required.

4.3~~D~~E SURVIVOR BENEFIT

When OCTA is notified of the death of an employee, his/her dependents will be covered under the group insurances offered by OCTA at time of death, OCTA will continue the health benefits at no cost to the dependent(s) for a maximum of three ~~(3)~~ months. After that time, dependents may be eligible for coverage in accordance with the provisions of the Consolidated Omnibus Budget Reconciliation Act (COBRA).

4.3~~EF~~ COBRA AND CONTINUED COVERAGE

All full-time or part-time employees terminating employment may ~~elect~~ ~~have~~ continuing health (medical, dental, and vision) insurance pursuant to the governing provisions of the program in which they are enrolled. The employee will be required to pay the premium for the coverage selected in accordance with the provisions of COBRA, except as provided in the "Layoff and Workforce Reduction Policy". Health coverage ends the last day of the month in which the employee terminates.

4.3~~FG~~ CONTINUATION OF RETIREE HEALTH BENEFITS FOR RETIREES

An employee who retires from OCTA is eligible to continue medical, dental, and/or vision coverage, provided the retiree continues to pay 100% of the full monthly premium. Current group health benefits may continue up to age 65.

An employee who defers retirement or receives disability retirement is not eligible for this benefit.

For additional information regarding retiree health benefits that may apply under the Additional Retiree Benefit Account Plan (ARBA) please refer to section 4.7C

4.4 MISCELLANEOUS BENEFITS

4.4A EMPLOYEE RECREATION ASSOCIATION

The ~~Appointing Authority~~AA will be responsible for monitoring the Employee Recreation Association (ERA), which is administered by the Finance and Administration Division. The ERA is a council of 11 members who meet to discuss various employee recognition activities and events and how best to fund them.

4.4B EMPLOYEE USE OF TRANSPORTATION SYSTEM

The ~~Appointing Authority~~AA has established policies and procedures regarding employees and eligible dependents' free transportation on OCTA's transportation services. See "Employee Identification Cards and Dependent Transportation Passes Policy".

4.4C MILEAGE REIMBURSEMENT

An employee will be reimbursed for use of his/her private automobile for official business of OCTA at the rate established by the Internal Revenue Service (IRS).

The Appointing AuthorityAA will determine what constitutes official OCTA business, which would require use of an employee's private automobile. Local travel for mileage reimbursement purposes will include travel in Los Angeles, Orange, San Bernardino, Riverside, and San Diego counties. Executive employees are referenced in section 4.6A.

4.4D OUT-OF-POCKET EXPENSES

OCTA will reimburse its employees for out-of-pocket expenses incurred while conducting official business for OCTA as provided in the policies regarding travel and conference expenses.

4.4E PROFESSIONAL LICENSES AND CERTIFICATES

OCTA will pay for any work-related professional licenses, certificates, or renewal fees as approved by the Appointing AuthorityAA.

4.4F RECOGNITION AND AWARD PROGRAMS

The Appointing AuthorityAA may establish and maintain an employee service award program and employee appreciation programs to provide recognition to employees for performance, continuous service, safety, and commitment to public transportation.

4.5 LEAVES OF ABSENCE

Leaves of absence may be granted by the Appointing AuthorityAA to employees with or without pay. This policy will be interpreted and applied in accordance with all applicable state and federal laws. For a detailed description of the various leaves of absence, please refer to the "Leave of Absence Policy" and the "Military Leave Policy."

4.5A PERSONAL LEAVE

When requested, the ~~Appointing Authority~~AA may grant a personal leave of absence without pay for an initial period of 30 calendar days and extensions may be granted to a maximum of six ~~(6)~~ months from the beginning date of the personal leave.

A personal leave of absence may be granted once all accrued/benefit hours have been exhausted, including vacation hours, sick hours, and Personal Paid Holiday (PPH) hours.

If the personal leave of absence extends for 30 calendar days or less, an employee will be returned to his/her original classification. If the personal leave of absence extends for more than 30 calendar days, OCTA will not guarantee the employee's classification or employment with OCTA, but will attempt to reinstate the employee to a like or similar classification.

~~The employee will have continuing life insurance, medical, dental, and vision benefits for 30 calendar days following the date on which the personal leave of absence begins. An employee will be responsible for the monthly cost of the group insurance premiums for the month in which the employee returns to work.~~

~~During the initial 30 calendar-days following the date on which the personal leave of absence begins, period covered under Personal Leave, OCTA will continue to offer provide life insurance, medical, dental and vision benefits at the same employee coverage cost and the same contribution for dependent premiums at the applicable current rate. To continue health coverage, employees on an unpaid status are responsible for submitting health insurance contributions, at the same rate and frequency as active employees. Failure to pay the employee's contribution may result in a lapse of coverage.~~

~~To continue health coverage, employees on an unpaid status are responsible for submitting health insurance contributions, at the same rate and frequency as active employees. Failure to pay the employee's contribution may result in a lapse of coverage.~~

After the initial 30 day period, the employee will be required to remit in advance each month, 100% of the monthly cost of the group insurance premiums incurred during the remainder of the leave of absence in order to continue group insurance. Non-receipt of premium reimbursements will result in the termination of the employee's insurance.

If an employee returns to work from a personal leave of absence, the employee will be responsible for 100% of the monthly cost of the group insurance premiums for the month in which the employee returns to work.

4.6 REIMBURSEMENTS AND ALLOWANCES

4.6A AUTOMOBILE ALLOWANCES AND ASSIGNMENT OF AUTOMOBILES

OCTA may elect to provide both an assigned automobile and all related expenses, or to provide a monthly automobile allowance to Executive employees. The monthly allowance will be in lieu of the IRS standard mileage reimbursement rate that would otherwise apply in the use of his/her personal automobile in the performance of his/her duties. An Executive employee may not receive the automobile allowance for any month during which the employee's driver license has expired, been revoked, or suspended for a moving violation while operating an automobile.

The automobile allowance will be in the same amount as is provided to the County of Orange managers at the department head or agency head level as determined by the Orange County Board of Supervisors.

OCTA may assign an automobile for each employee in the following positions: Base Manager, Bus Operations; Section Manager/Supervisor, Operations Support; Base Manager, Maintenance; Department Manager, Health, Safety and Environmental Compliance; Department Manager, Bus Operations; Department Manager, Contracted Services; Department Manager, Security and Emergency Preparedness; Emergency Management Specialist, and Department Manager, Maintenance. All related expenses are paid by OCTA. The automobile assigned to an employee may be used by other employees during regular working hours.

When needed, the Appointing AuthorityAA is authorized to assign an automobile on a 24 hour (overnight) basis to an employee as required to conduct OCTA business.

4.6B EDUCATIONAL REIMBURSEMENT PROGRAM

OCTA may provide an Educational Reimbursement Program to reimburse a full-time employee for reasonable educational expenses for work-related courses. The Appointing AuthorityAA will be responsible for developing, administering, and maintaining the program.

As authorized by the "Educational Reimbursement Plan Policy", aA full-time employee who satisfactorily completed approved, work-related educational courses as defined in the Educational Reimbursement Program Policy, a work-related course with a grade of "C" or better at an accredited trade school, community college, college, or university listed within the six regional associations, will be reimbursed in full for eligible expenses up to a maximum of \$3,500 per calendar fiscal year, not to exceed the Internal Revenue Service (IRS) tax free amount (currently \$5250). Increases to the tuition reimbursement

amount will be indexed to California State University Fullerton's (CSUF) tuition rates not to exceed the Internal Revenue Service (IRS) tax-free amount (currently \$5250). If an employee terminates employment, or gives notice of termination prior to completion of the course, no reimbursement will be made. Newly hired employees may be eligible for educational reimbursement after six ~~(6)~~ months of employment.

4.6C TABLET PURCHASE REIMBURSEMENT PROGRAM

OCTA may reimburse an employee for up to \$400 or 50 percent whichever is less, of actual expenditures for the cost of a personal tablet as authorized by the "Business Equipment Use PolicyOCTA Policy".

An employee may not receive more than \$400 during any 24 month period. Newly hired employees may be eligible for tablet reimbursement after six ~~(6)~~ months of employment.

4.6D UNIFORMS

An ~~Administrative~~ employee ~~in the Transit Division~~ who is required to wear a uniform on the job will be granted an allowance up to \$500 per year for the purchase of uniforms at OCTA's authorized uniform supplier. Uniform purchases must comply with the guidelines established by the ~~appropriate Transit d~~Division.

4.6E SAFETY SHOES

Executive Directors are authorized to approve the cost of a pair of work-required safety shoes approved by the employee's manager.

4.7 RETIREMENT AND DEFERRED COMPENSATION

4.7A DEFERRED COMPENSATION

OCTA may provide all full-time, part-time, and extra-help employees, including those covered by a collective bargaining agreement, with a deferred compensation program. The Deferred Compensation program is a benefit available to eligible employees to help them to save for retirement. The ~~Appointing AuthorityAA~~ will be responsible for the establishment and administration of this program, utilizing the services of an outside administrator. This service will be provided at no cost to OCTA.

The Deferred Compensation Program is overseen by the Deferred Compensation Plan Committee. The Charter of the Deferred Compensation Plan Committee for the Orange County Transportation Authority Retirement Plan Program constitutes the articles governing the operation of the Committee. The Authority has delegated to the CEO the responsibility of determining the Committee members which comprise the Deferred Compensation Plan Committee, as well as the duties and responsibilities of the Committee Members.

Enrollment in this program will be offered to employees on a voluntary basis, unless mandated by state or federal law. Employee contributions to the program will be made by a payroll deduction. The CEO may authorize OCTA to pay all or part of the employee contribution for designated ~~classes of~~ employees.

Administrative employees will receive OCTA-paid matching contributions to 401 (a) plans based on years of service as set forth below, provided employees are making contributions of at least that amount to the OCTA 457 (b) plan:

Years of Service	Percent of Base Pay
<u>New Hire</u> 5 or more years	1%
<u>At the Beginning of Year 5</u> 10 or more years	2%
<u>At the beginning of Year 10</u> 20 or more years	3%

In addition to the above scale, employees in Salary Grade V and above will receive an employer-paid matching contribution of up to two percent of base salary to the 401 (a) plan upon hire or promotion, provided employees are making contributions of at least that amount to the OCTA 457 (b) plan.

4.7B RETIREMENT

All full-time and part-time employees of OCTA will participate in the Orange County Employees Retirement System (OCERS) and will be governed by its rules and regulations.

~~Any employee hired on or after January 1, 2013,~~ All employees shall pay 100 percent of the OCERS employee contribution rate each pay period.

~~For employees not covered by paragraph 1 above, commencing January 1, 2016, employees shall pay 75 percent of the employee contribution, and OCTA will pay the share of the employee contribution that is not paid by the employee. Commencing January 1, 2017, employees shall pay 100 percent of the employee contribution.~~

- ~~1. Any employee hired on or after January 1, 2013, and who has established reciprocity, will pay the OCERS employee contribution rate according to paragraph 2.~~

4.7C ADDITIONAL RETIREE BENEFIT ACCOUNT PLAN

An employee who retires from OCTA after January 1, 1995 may be eligible for a benefit under the Additional Retiree Benefit Account Plan (ARBA) Plan. The retiring employee is eligible if the following conditions are met:

- at least ten ~~(10)~~ years of service and at least 50 years of age at retirement, and
- receives a service retirement benefit under OCERS within 30 days from the date of separation.

The benefit amount represents \$10.00 per month per year of service, not to exceed a monthly benefit of \$150.00

OCTA reserves the right to modify or terminate this plan at any time by action of the Board. Administration of the ARBA Plan will be in accordance with the plan document.

Exceptions to the above policy resulting from the consolidation of the Orange County Transit District and the Orange County Transportation Commission are addressed in Grandfathered Benefits referenced in section 4.2.

4.8 TIME OFF BENEFITS

4.8A ACCRUALS

All paid time-off benefits will accrue during a leave of absence for only the period during which the employee is paid. An employee on unpaid leave of absence does not earn service credit for purposes of retirement benefits. An employee who returns to work from a leave of absence retains all accumulated service credit. Service credit for retirement benefits will be based on the specifications of the retirement system.

4.8B BEREAVEMENT LEAVE

In accordance with the "Bereavement Leave Policy", a full-time or part-time employee will be granted paid bereavement leave for time actually lost, up to three ~~(3)~~ regularly-scheduled workdays, to arrange for and/or attend the funeral, cremation, or memorial service of an immediate family member.

Immediate family member includes: spouse, parent, child, brother, sister, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepchild, stepparent, stepbrother, stepsister, grandparent, grandchild, legal guardian/ward, or registered domestic partner. Bereavement leave may be granted for each occurrence.

An eligible employee who attends the funeral, cremation, or memorial service of an immediate family member outside a 350-mile radius from the OCTA Headquarters will be granted up to five ~~(5)~~ days paid bereavement leave.

The paid bereavement leave will not be chargeable to sick leave or vacation. The ~~Appointing Authority~~AA will authorize such absence from work.

Additional leave, if required, to make arrangements and/or attend the funeral, cremation, or memorial service of an immediate family member may be approved by the ~~Appointing Authority~~AA and will be charged against accrued sick or vacation leave.

4.8C CATASTROPHIC LEAVE DONATIONS

Employees may elect to donate accrued sick and/or vacation leave ~~to a Catastrophic Leave Bank for use by another~~ employee who has met the eligibility requirements under the Catastrophic Leave policy. For a detailed description, please refer to the "Catastrophic Leave Donation Policy."

4.8D HOLIDAYS AND PERSONAL PAID HOLIDAYS

OCTA will observe ~~124~~ paid holidays consisting of designated holidays and PPHs as determined by the CEO.

A full-time, non-exempt employee will receive the equivalent of 12 days up to 9688 hours of holiday pay at his/her regular rate during the calendar year. A full-time non-exempt employee who works an alternate work schedule will receive holiday pay for each of the above holidays based on his/her normally scheduled workday.

When a holiday falls on a Saturday, the previous day will be observed as the holiday, and when a holiday falls on a Sunday, the next day will be observed as the holiday, unless otherwise designated by the CEO. When a holiday falls on an employee's scheduled day off, either the previous working day or the next scheduled working day will be observed by the employee as the holiday.

A full-time or part-time non-exempt employee who is required to work on a holiday will be paid at 1-1/2 times his/her regular hourly rate for all hours worked in addition to pay for his/her regularly-scheduled workday. An exempt employee will receive no premium pay for work on a scheduled OCTA holiday.

A full-time, exempt employee will receive holiday pay for each of the above holidays and will be paid based on his/her normally scheduled workday.

All part-time employees will receive holiday pay for each holiday at his/her regular rate on a pro-rated basis.

PPHs are taken at an employee's discretion following supervisory approval. An employee will be paid for any unused PPHs for the current calendar year in the event of termination or retirement. The maximum number of PPHs that an employee may accrue will be two (2) days over the current calendar year's entitlement.

4.8E JURY DUTY

A full-time or part-time employee who is called for jury duty or for examination for jury duty will receive compensation at his/her regular rate of pay for those days that coincide with the employee's regularly-scheduled workdays.

Full-time and part-time employees are not eligible to receive additional compensation from the court system.

4.8F SICK LEAVE – FULL-TIME AND PART-TIME EMPLOYEES

OCTA provides a plan for full-time and part-time employees to accrue sick leave.

Sick leave may be used for an absence from employment for any of the following reasons:

- the employee is physically or mentally unable to perform his/her duties due to illness, injury, or medical condition of the employee, and
- the absence is for the purpose of obtaining professional diagnosis or treatment for a medical condition of the employee.
- The employee is a victim of domestic abuse, sexual assault and/or stalking.
- The absence is to care for a qualified family member. A qualified family member is defined as a spouse, registered domestic partner, parent, child, grandparent, grandchild, or sibling

~~For leaves other than the employee's own serious illness, the employee may use accrued vacation leave, and leave in excess of accrued vacation will be unpaid unless the employee desires to use accrued sick leave.~~

An employee will accrue sick leave with pay for each paid hour in a regularly scheduled workweek at the rates as provided in the following table:

Years of Service	Accrual Rates	Approximate Accrual
Less than 3 years	.0347 Hours	9 days per year
3 years or more	.0462 Hours	12 days per year

Sick leave will be paid consistent with an employee's regularly scheduled workday. Accrued sick leave will be added to the employee's sick leave accumulation account upon the completion of the pay period, with no credit to be applied during the progress of the pay period or for a fraction of the pay period during which an employee's service is terminated.

An employee who terminates from OCTA with ten ~~(10)~~ years or more of continuous service and who is in good standing with OCTA will receive payment of any earned but unused sick leave up to a maximum of 160 hours.

Upon termination from OCTA due to death, an employee's estate will be paid 100 percent of the employee's unused or unpaid sick leave.

Upon retirement from OCTA, provided the employee has ten ~~(10)~~ years or more of continuous service, the employee will be paid a maximum of 240 hours of his/her unused sick leave. An employee is considered retired if he/she begins receiving a retirement

benefit from OCERS ~~at the time within 30 days~~ of his/her termination. This benefit does not apply to ~~deferred~~ retirement.

Upon termination from OCTA due to layoff, all unused or unpaid sick leave will be paid to the affected employee.

An employee, who is injured on the job, resulting in loss of time, will be paid for the balance of the assignment on the day of injury at the regular rate of pay. The employee will also be paid for the time lost during the waiting period (first three ~~(3)~~ days following date of injury, for which no Workers' Compensation benefits are provided). This payment will be at benefit rates provided under the Workers' Compensation Act. Payments under this section will not be charged against the employee's accumulated sick leave. Vacation and sick leave accruals will continue during the three ~~(3)~~ day period and the employee will be credited as if he/she had worked his/her regularly scheduled hours each day.

For group insurance purposes only, time lost due to an on-the-job injury will not be considered an unpaid leave of absence. OCTA will continue to maintain and pay for the employee's group health coverage at the same level as active employees. To continue health coverage, an employee will be responsible for submitting health insurance contributions at the same rate and frequency as active employees. Failure to pay the employee's contribution may result in a lapse of coverage.

Extra-Help Employees

OCTA provides a plan for extra-help employees, including interns to accrue sick leave. The employee will be eligible to use their sick leave on the 90th day of employment.

Sick leave may be used for an absence from employment for any of the following reasons:

- The employee is physically or mentally unable to perform his/her duties due to illness, injury or medical condition of the employee.
- The employee is a victim of domestic violence, sexual assault, and/or stalking.
- The absence is to care for a qualified family member. A qualified family member is defined as a spouse, registered domestic partner, parent, child, grandparent, grandchild, or sibling.

An employee will accrue sick leave with pay for each paid hour in a regularly scheduled workweek at the rate as provided in the following table:

Accrual Rate	Approximate Accrual
.0334 Hours	3 days per year

4.8G SICK LEAVE SELLBACK

An employee who has accumulated sick leave in excess of 120 hours, as of the close of the first pay period ending in November, may choose to retain all unused accumulated sick leave and continue to accrue sick leave or to receive a single payment at his/her current rate of pay for any amount in excess of 120 hours. If the employee elects to receive payment, ~~it will be paid no later than the pay date of the final payroll of that year; it will be paid prior to December 31 of that year.~~

4.8H VACATION

OCTA provides vacation leave with pay for full-time and part-time employees. Vacation leave is differentiated from other types of leave because it is intended for the rest, relaxation, and renewal of employees.

Accrued vacation leave will be applied to the employee's vacation accumulation account only upon completion of each pay period, except when an employee terminates.

Upon termination, all unused vacation leave accrued through the employee's termination date will be paid.

An employee with less than two ~~(2)~~ years of service will earn .0385 hours of vacation leave for each straight time hour of pay in a regularly scheduled workweek, unless otherwise approved by the ~~Appointing Authority~~AA and authorized by the Department Manager, Human Resources.

Accrual rates change beginning with the pay period following the pay period that begins the next year of service.

At the Beginning of Year:	The Employee Shall Earn:	To a Maximum of:
3	.0577 hrs.	120
10	.0770 hrs.	160
15	.0808 hrs.	168
16	.0847 hrs.	176
17	.0885 hrs.	184
18	.0924 hrs.	192
19 or more	.0962 hrs.	200

The maximum allowable accrued vacation leave at any time for full-time or part-time employees is as follows:

Years of Service	Maximum Accrued Vacation Leave
Less than 2	160 Hours

Less than 3	240 Hours
Less than 10	300 Hours
Less than 19	390 Hours
19 or more	440 Hours

An employee will not accrue vacation leave in excess of the maximum amount unless authorized by the CEO. The CEO is exempt from a maximum accrual. Vacations will be scheduled consistent with efficient OCTA operations.

4.8I VACATION SELLBACK

An employee has the option of selling back up to 200 hours of vacation pay each calendar year for accrued but unused vacation. An employee must use at least 40 hours of vacation during the previous 12 months before exercising the sellback option.

The sellback option may be exercised twice in any given calendar year and may not exceed 200 hours.

Under unusual circumstances involving verifiable emergencies, the **Appointing Authority** may authorize a cash value payment to an employee for an amount up to the total amount of accrued vacation.

An employee terminating from OCTA will be paid, in a lump sum payment, for all unused vacation leave accrued through his/her termination date at his/her current rate of pay.

SECTION 5 COMPENSATION

5.1 PHILOSOPHY

OCTA's objective is to provide competitive wages based on the market value for comparable work. Human Resources strives to administer the compensation program in a flexible but consistent manner. The purpose of the compensation program is to attract, retain, and motivate employees.

Employees are recognized for their contributions through performance-based merit increases.

5.1A SALARY RESOLUTION

The purpose of the Salary Resolution is to:

- attract and retain a workforce dedicated to excellence, thereby ensuring OCTA's ability to meet the present and future business objectives of the organization,
- maintain a salary program that will give maximum incentive to real accomplishments and compensate individuals on the basis of merit without discrimination, while providing necessary administrative control of salary costs, and
- provide salary structures that are internally equitable and externally competitive.

5.1B SALARY STRUCTURE

The Salary Structure is designed to provide:

- salary grade ranges for classifications based upon the scope and level of responsibility of work performed in comparison to other work performed within OCTA and in comparison to the external market, and
- salaries paid to employees that reflect the level of responsibilities of the classification and the performance of the individual.

5.2 ADMINISTRATION OF COMPENSATION

The ~~Appointing Authority~~AA is responsible for the establishment of definitive guidelines for adjusting individual salaries and salary ranges. The development and administration of these guidelines may be delegated to appropriate staff.

Within guidelines established by the ~~Appointing Authority~~AA, compensation adjustments may be given:

- as an increase to base pay,
- in a lump sum payment; ~~and/or~~
~~as deferred compensation.~~

The ~~Appointing Authority~~AA is authorized to adjust an incumbent's salary. The salary of each Executive employee will be determined by the CEO.

5.3 NEWLY HIRED/PROMOTED EMPLOYEES

An employee may be hired or promoted into a position at any salary within the range for the classification; such salary is to be determined based on individual qualifications. Approval by the Division Executive Director is required for starting salaries at or above the midpoint of the salary grade for external hires. Approval by the CEO is required for starting salaries at or above the midpoint of the salary grade for external hires in salary grade V or for employee salary increases over ten ~~(10)~~ percent.

~~For new hires, A~~fter six ~~(6)~~ months of employment, the employee's performance will be evaluated and the employee may be eligible for an increase based on the employee's performance level.

The performance of promoted employees may be evaluated after six months, as determined by the hiring manager prior to the job offer. The six month review date is calculated from the beginning of the pay period in which they were promoted. At the end of six months, the promoted employee may be eligible for an increase based on their performance. All promotions and salary increases must have an effective date that is the first day of a pay period.

Subsequent performance reviews will be conducted annually on a common review date and merit increases may be authorized at that time.

5.4 RECLASSIFICATIONS

When a position is changed to a different classification in a higher salary grade, a lower salary grade, or in the same salary grade, it will be considered a reclassification. This action is based on substantial changes in the kind, difficulty, and/or responsibility level of the duties performed.

Any employee in a position that is reclassified to a higher salary grade will be paid at least the minimum of the new salary grade. An employee in a position that is reclassified to a lower salary grade may have his/her salary reduced to the maximum of the new salary grade or with approval of the Appointing Authority, may retain his/her salary paid prior to the reclassification.

5.5 CLASSIFICATION TITLES

All filled positions must have classification titles that are included in the Personnel and Salary Resolution. The CEO or the Board may authorize the addition of new classification titles to the PSR and assign or authorize changes to classification salary grade assignments at any time during the year.

5.6 PROMOTIONS

~~A promoted employee may have a six (6) month performance review which is computed from the beginning of the pay period in which the employee was promoted. A merit increase may be authorized at this time.~~

5.6.7 MERIT ADJUSTMENTS

An employee may receive a merit increase based on his/her performance evaluation rating at the time of the common review unless the overall rating is "Does Not Meet Expectations."

For fiscal year 201~~7~~6-18, the total dollar amount of all merit increases granted pursuant to the provisions above shall not exceed three and a half ~~four (4)~~ percent of the total budgeted salaries for administrative positions authorized by the Board.

Individual merit increases may vary in amount depending on performance.

An employee's performance may be reviewed at any time during the year as appropriate, but his/her salary may not be adjusted other than as provided in this ~~Personnel and Salary Resolution~~PSR.

5.78 SPECIAL PERFORMANCE AWARDS

The ~~Appointing Authority~~AA may authorize special performance awards for full-time and part-time employees based on individual employee performance. Each award will be a single lump sum payment and will not increase an employee's base salary. Employees who have not completed six ~~(6)~~ months of employment, are not eligible to receive a Special Performance Award. An employee may not receive over 6% of their total salary in Special Performance Awards per fiscal year.

For fiscal year 201~~7~~6-18~~7~~, the total dollar amount for all special performance awards granted pursuant to the provisions above shall not exceed three ~~(3)~~ percent of the total budgeted salaries for positions authorized by the Board.

5.89 TEMPORARY ASSIGNMENTS

When an employee is temporarily assigned duties of a different position with the same or higher salary grade, the employee's salary may be increased by an amount not to exceed five ~~(5)~~ percent per salary grade for the difference between the employee's current classification and the temporary assignment. Such increases may be made only in those instances where the assignment will last at least 30 days and will not, in any event, be paid for a period in excess of 180 days, without written authorization by the CEO. Temporary increases must be effective the first day of a pay period.

5.910 EQUITY ADJUSTMENTS

The ~~Appointing Authority~~AA is authorized to adjust an incumbent's base salary to resolve a significant salary disparity manifested by internal salary compression, external market pressure(s), or both, whereby the individual is no longer appropriately compensated and a base salary adjustment is appropriate.

Equity adjustments should be used sparingly and should not be done in lieu of or in combination with, a promotion, reclassification, transfer, or merit adjustment. The types of situations in which an equity adjustment is appropriate include, but are not limited to:

- a. Retention of critical staff,
- b. Salary compression issues,
- c. Impact of new hires whose hiring rate exceeds those of current staff,
- d. Offer from another employer,
- e. Assignment of more complex duties that do not meet the criteria for reclassification, and

- f. Equity with peers in the same classification with similar education and experience levels.

Equity adjustments may not increase an incumbent's salary outside the specified salary range. Additionally, equity adjustments do not affect any established merit pool approved by the Board.

Equity adjustments may only be approved by the CEO.

SALARY GRADE STRUCTURE

Grade	Period	Minimum	Midpoint	Maximum
C	Hourly	13.00 <u>14.00</u>	14.00 <u>15.00</u>	16.00 <u>17.00</u>
	Intern			

Grade	Period	Minimum	Midpoint	Maximum
F	Hourly	16.50 <u>16.98</u>	20.12 <u>20.60</u>	23.73 <u>24.21</u>
	Monthly	2,860.00 <u>2,943.20</u>	3,487.46 <u>3,570.67</u>	4,113.20 <u>4,196.40</u>
	Annual	34,320.00 <u>35,318.40</u>	41,849.60 <u>42,848.00</u>	49,358.40 <u>50,356.80</u>
	Customer Relations Representative General Services Specialist, Assistant Office Specialist, Assistant On-Board Evaluator			

Grade	Period	Minimum	Midpoint	Maximum
G	Hourly	17.44 <u>17.95</u>	21.36 <u>21.87</u>	25.28 <u>25.79</u>
	Monthly	3,022.93 <u>3,111.33</u>	3,702.40 <u>3,790.80</u>	4,381.86 <u>4,470.27</u>
	Annual	36,275.20 <u>37,336.00</u>	44,428.80 <u>45,489.60</u>	52,582.40 <u>53,643.20</u>
	Customer Relations Representative Schedule Checker			

Grade	Period	Minimum	Midpoint	Maximum
H	Hourly	18.54 <u>19.09</u>	22.78 <u>23.33</u>	27.04 <u>27.56</u>
	Monthly	3,213.60 <u>3,308.93</u>	3,948.53 <u>4,043.87</u>	4,681.73 <u>4,777.07</u>
	Annual	38,563.20 <u>39,707.20</u>	47,382.40 <u>48,526.40</u>	56,180.80 <u>57,324.80</u>
	Accounting Specialist, Associate Customer Relations Representative, Senior General Services Specialist Office Specialist Schedule Checker, Senior Warranty Coordinator, Associate			

Grade	Period	Minimum	Midpoint	Maximum
J	Hourly	19,652 <u>20,23</u>	24,252 <u>24,83</u>	28,852 <u>29,43</u>
	Monthly	3,406.00 <u>3,506.53</u>	4,203.33 <u>4,303.87</u>	5,000.66 <u>5,101.20</u>
	Annual	40,872.00 <u>42,078.40</u>	50,440.00 <u>51,646.40</u>	60,008.00 <u>61,214.40</u>
<u>Customer Relations Representative, Senior</u> Digital/Reprographic Specialist General Services Specialist, Senior <u>Help Desk Technician, Associate</u> Marketing Specialist, Assistant Office Specialist, Senior Schedule Analyst, Associate				

Grade	Period	Minimum	Midpoint	Maximum
K	Hourly	20,932 <u>21,55</u>	25,942 <u>26,56</u>	30,953 <u>31,57</u>
	Monthly	3,627.86 <u>3,735.33</u>	4,496.26 <u>4,603.73</u>	5,364.66 <u>5,472.13</u>
	Annual	43,534.40 <u>44,824.00</u>	53,955.20 <u>55,244.80</u>	64,376.00 <u>65,665.60</u>
Accounting Specialist <u>Administrative Specialist</u> Asset Management Administrator Buyer, Associate Digital/Reprographic Specialist, Senior Grants Technician <u>Help Desk Technician, Associate</u> <u>Help Desk Technician</u> HR Assistant Strategic Communications Coordinator Warranty Coordinator				

Grade	Period	Minimum	Midpoint	Maximum
L	Hourly	22,622 <u>23.30</u>	28,202 <u>28.88</u>	33,773 <u>34.45</u>
	Monthly	3,920.80 <u>4,038.67</u>	4,888.00 <u>5,005.87</u>	5,853.46 <u>5,971.33</u>
	Annual	47,049.60 <u>48,464.00</u>	58,656.00 <u>60,070.40</u>	70,241.60 <u>71,656.00</u>
	Accountant, Associate Administrative Specialist Benefits Analyst, Associate Board Specialist Business Unit Analyst, Associate Claims Representative, Associate Code Administrator Community Relations Specialist, Associate Contract Administrator, Associate Customer Relations Specialist, Associate Executive Assistant I External Affairs, Administrator Financial Analyst, Associate Fleet Analyst, Associate Government Relations Representative, Associate Health, Safety & Compliance Specialist, Associate Help Desk Technician Help Desk Technician, Senior Human Resources Representative, Associate Intranet/Multimedia Specialist, Associate Learning and Development Administrator, Associate Marketing Specialist, Associate Media Relations Specialist, Associate Public Information Specialist, Associate Records Administrator Schedule Analyst Service Planning Analyst, Associate Stops and Zones Analyst, Associate Stops and Zones Planner, Associate Section Supervisor I Talent Specialist, Associate Transportation Funding Specialist Warranty Coordinator, Senior Web Data Analyst, Associate			

Grade	Period	Minimum	Midpoint	Maximum
M	Hourly	24,842 <u>25.59</u>	30,973 <u>31.72</u>	37,093 <u>37.84</u>
	Monthly	4,305,604 <u>4,356.60</u>	5,368,135 <u>5,498.13</u>	6,428,936 <u>6,558.93</u>
	Annual	51,667,205 <u>53,227.20</u>	64,417,606 <u>65,977.60</u>	77,147,207 <u>78,707.20</u>
	Accountant			
	Bus Operations Supervisor			
	Business Systems Analyst, Associate			
	Business Unit Analyst			
	Buyer			
	Claims Representative			
	Coach Operations Instructor			
	Code Administrator, Senior			
	Community Relations Specialist			
	Compensation Analyst, Associate			
	Customer Relations Specialist			
	Desktop Support Technician, Associate			
	Employee Programs Specialist			
	Employee Relations Representative, Associate			
	Executive Assistant II			
	External Affairs Administrator, Senior			
	Financial Analyst, Associate			
	GIS Analyst, Associate			
	Help Desk Technician, Senior			
	Internal Auditor, Associate			
	Intranet/Multimedia Specialist			
	Learning and Development Administrator, Associate			
	Marketing Program Administrator, Associate			
	Marketing Specialist			
	Media Relations Specialist			
	Payroll Administrator			
	Program Management Analyst, Associate			
	Programmer Analyst, Associate			
	Public Information Specialist			
	Rail Maintenance-of-Way Administrator			
	Real Property Agent, Associate			
	Section Supervisor II			
	Stops and Zones Analyst			
	Stops and Zones Planner			
	Transportation Analyst, Associate			
	Transportation Funding Analyst, Associate			
	Transportation Modeling Analyst, Associate			
	Web Data Analyst			

Grade	Period	Minimum	Midpoint	Maximum
N	Hourly	27,342 <u>28,16</u>	34,083 <u>4,91</u>	40,834 <u>1,65</u>
	Monthly	4,738.93 <u>4,881.07</u>	5,907.20 <u>6,051.07</u>	7,077.20 <u>7,219.33</u>
	Annual	56,867.20 <u>58,572.80</u>	70,886.40 <u>72,612.80</u>	84,926.40 <u>86,632.00</u>
	Benefits Analyst			
	Business Relations Administrator			
	Business Unit Analyst, Senior			
	Clerk of the Board, Assistant			
	Compensation Analyst			
	Contract Administrator			
	Desktop Support Technician			
	Employee Relations Representative			
	Employee Relations Representative, Associate			
	Executive Assistant III			
	Field Administrator			
	Financial Analyst			
	Fleet Analyst			
	GIS Analyst			
	GIS Analyst, Associate			
	Government Relations Representative, Associate			
	Government Relations Representative			
	HR Business Partner, Associate			
	Human Resources Representative			
	Internal Auditor			
	Intranet/Multimedia Specialist, Senior			
	IS Security Analyst, Associate			
	Learning and Development Administrator			
	LOSSAN Executive Administrative Assistant			
	LOSSAN Marketing Specialist, Senior			
	Marketing Specialist, Senior			
	Media Relations Specialist, Senior			
	Network Analyst, Associate			
	Programmer Analyst			
	Project Controls Analyst			
	Public Information Specialist, Senior			
	Rail Maintenance-of-Way Administrator, Senior			
	Real Property Agent, Associate			
	Real Property Agent			
	Schedule Analyst, Senior			
	Section Supervisor III			
	Security Access Administrator			
	Service Planning Analyst			
	Stops and Zones Analyst, Senior			
	Stops and Zones Planner, Senior			
	Talent Specialist			
	Transportation Analyst, Associate			
	Transportation Funding Analyst, Associate			
	Transportation Modeling Analyst, Associate			
	Transportation Analyst			
	Transportation Funding Analyst			
	Transportation Modeling Analyst			
	Web Data Analyst, Senior			

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Grade	Period	Minimum	Midpoint	Maximum
P	Hourly	30,333.23	37,653.56	44,984.88
	Monthly	5,257.205,413.20	6,526.006,683.73	7,796.537,952.53
	Annual	63,086.4064,958.40	78,312.0080,204.80	93,558.4095,430.40
	Accountant, Senior Business Computing Solutions Specialist, Associate Business Intelligence Analyst, Associate Business Systems Analyst Business Unit Analyst, Principal Buyer, Senior Civil Engineer Claims Representative, Senior Community Relations Specialist, Senior Community Transportation Coordinator Customer Relations Specialist, Senior Desktop Support Technician, Senior Employee Programs Administrator Employee Relations Representative Executive Assistant IV Field Administrator, Senior Financial Analyst GIS Analyst Government Relations Representative Health, Safety & Environmental Compliance Specialist Human Resources Business Partner Human Resources Representative, Senior Learning & Development Administrator, Senior Maintenance Field Administrator Maintenance Resource Analyst Maintenance Instructor Marketing Production Administrator Marketing Program Administrator Program Management Analyst Real Property Agent Section Supervisor IV Stops and Zones Analyst, Principal Strategic Communications Specialist, Senior Systems Software Analyst, Associate Talent Specialist, Senior Telecommunications Administrator Telecommunications Technician Transportation Analyst Transportation Funding Analyst Transportation Modeling Analyst Web Developer Wellness Coordinator Worker's Compensation Program Specialist			

Grade	Period	Minimum	Midpoint	Maximum
R	Hourly	33,593 <u>34,600</u>	41,924 <u>42,920</u>	50,235 <u>51,240</u>
	Monthly	5,822.26 <u>5,997.33</u>	7,266.13 <u>7,439.47</u>	8,706.53 <u>8,881.60</u>
	Annual	69,867.20 <u>71,968.00</u>	87,193.60 <u>89,273.60</u>	104,478.40 <u>106,579.20</u>
	Assistant Base Manager Benefits Analyst, Senior Business Computing Solutions Specialist Business Intelligence Analyst Business Systems Analyst, Senior Community Relations Officer Community Transportation Coordinator, Senior Compensation Analyst, Senior Contract Administrator, Senior Database Administrator Employee Relations Representative, Senior Executive Assistant V Facilities Maintenance Supervisor Financial Analyst, Senior Fleet Analyst, Senior GIS Analyst, Senior Government Relations Representative, Senior Health, Safety & Environmental Compliance Specialist, Senior Human Resources Business Partner, Senior Inventory Analyst IS Project Manager I IS Security Analyst LOSSAN Marketing and Communications Officer Maintenance Field Administrator, Senior Maintenance Instructor, Senior Maintenance Planner Maintenance Supervisor Materials Management Planner Network Analyst OCTAP Administrator Operations Analyst, Principal Program Management Analyst, Senior Project Controls Analyst, Senior Project Manager I Real Property Agent, Senior Section Manager I Service Planning Analyst, Senior Strategic Communications Officer Transit Project Manager I Transportation Analyst, Senior Transportation Funding Analyst, Senior Transportation Modeling Analyst, Senior Web Developer, Senior			

Grade	Period	Minimum	Midpoint	Maximum
S	Hourly	37,733.86	47,064.19	56,385.51
	Monthly	6,539,866.73	8,157,068.35	9,772,539.96
	Annual	78,478.40	97,884.80	117,270.40
	Accountant, Principal Benefits Analyst, Principal Business Computing Solutions Specialist, Senior Business Intelligence Analyst, Senior Business Systems Analyst, Principal Civil Engineer, Senior Claims Manager Compensation Analyst, Principal Construction Safety Officer Data Warehouse Architect Database Administrator, Senior Emergency Management Specialist Employee Relations Representative, Principal Financial Analyst, Principal Government Relations Representative, Principal GIS Analyst, Principal Health, Safety & Environmental Compliance Specialist, Principal Internal Auditor, Senior IS Project Manager II Learning & Development Administrator, Principal LOSSAN Transportation Analyst, Principal Maintenance Field Administrator, Principal Media Relations Officer Network Analyst, Senior Program Management Analyst, Principal Programmer Analyst, Senior Project Controls Analyst, Principal Project Manager II Real Property Agent, Principal Real Property Agent, Senior Section Manager II SharePoint System Architect Systems Software Analyst Transit Project Manager II Transportation Analyst, Principal Transportation Funding Analyst, Principal Transportation Modeling Analyst, Principal Web Developer, Principal			

Grade	Period	Minimum	Midpoint	Maximum
T	Hourly	43,682.41	54,052.78	64,413.14
	Monthly	7,571.20351.06	9,368.67148.53	11,164.400,944.26
	Annual	88,212.8090,854.40	112,424.0009,782.40	133,972.801,331.20
Analysis Project Manager Base Manager Business Computing Solutions Specialist, Lead Civil Engineer, Principal <u>Construction Safety Section Manager</u> Contract Administrator, Principal Data Warehouse Architect, Senior Database Administrator, Principal Deputy Treasurer Internal Auditor, Principal IS Business Strategist IS Enterprise Architect IS Project Manager III IS Security Analyst, Senior LOSSAN Deputy Director/Rail Operations Manager LOSSAN Finance and Administration Manager LOSSAN Mechanical Compliance Officer Project Manager III Rail Systems Safety Specialist, Principal <u>Real Property Agent, Principal</u> Section Manager III Service Planning Analyst, Principal Systems Software Analyst, Senior Transit Project Manager III				

Grade	Period	Minimum	Midpoint	Maximum
U	Hourly	50,084.61	62,290.82	74,503.03
	Monthly	8,680.53425.73	10,796.93542.13	12,913.33658.53
	Annual	104,166.401,108.80	129,563.206,505.60	154,960.001,902.40
Data Warehouse Architect, Principal Internal Audit, Senior Manager <u>Project Manager, Senior</u> Section Manager, Senior Strategic Plan Officer				

Grade	Period	Minimum	Midpoint	Maximum
V	Hourly	54,172.59	67,375.79	80,577.99
	Monthly	9,389.47	11,677.47	13,965.47
	Annual	112,673.60	140,129.60	167,585.60
Department Manager LOSSAN Deputy Managing Director LOSSAN Operations Compliance and Safety Manager Program Manager Strategic Communications Manager				

GLOSSARY OF TERMS

ADMINISTRATIVE EMPLOYEE	Any employee of OCTA not covered by a collective bargaining agreement.
APPOINTING AUTHORITY	The Chief Executive Officer (CEO); he/she may delegate this responsibility.
AT-WILL EMPLOYMENT	An employee's employment status may be changed, including, but not limited to, termination of employment, by OCTA or the employee, at any time for any reason.
BOARD	The Board of Directors of the Orange County Transportation Authority.
CATASTROPHIC LEAVE	An extended leave due to an employee's <u>own</u> serious illness or medical condition, <u>or that of an immediate family member where the employee is the primary caregiver</u> , that incapacitates the employee and where the employee is expected to use up his/her entire accrued leave.
CLASSIFICATION OR CLASSIFICATION TITLE	The title that identifies the type of work being performed by one or more incumbents in a position.
DOMESTIC PARTNER	A domestic partnership is established in California when both persons file a Declaration of Domestic Partnership with the Secretary of State. A domestic partner is further defined by California's Family Code, Section 297-297.5.
ELIGIBLE DEPENDENT	Spouse, registered domestic partner, and dependent children up to the age 26.
EQUITY INCREASE	An adjustment to an employee's base salary to resolve a significant salary disparity manifested by internal salary compression, external market pressure(s), or both, whereby the individual is no longer appropriately compensated and a base salary adjustment is appropriate.

EXECUTIVE EMPLOYEE	An employee classified as Chief Executive Officer, Deputy Chief Executive Officer, Executive Director, Division Director, General and <u>General</u> Manager, or Assistant General Manager.
EXEMPT EMPLOYEE	An employee in a position that is not covered under the provisions of the Fair Labor Standards Act (FLSA) regarding minimum wage, overtime, maximum hours, and recordkeeping.
EXTRA-HELP EMPLOYEE	An employee hired to serve as part-time augmentation of staff in which the duty or task defined generally requires less than 20 hours of work per week and no more than 1,000 work hours within a continuous 12-month period. An extra-help employee is not eligible for employee benefits.
FULL-TIME EMPLOYEE	An administrative employee in a position with a normal workweek that totals at least 40 hours.
INTERN	An intern is a type of extra-help employee enrolled as a full-time student at a two or four year college or university pursuing a course of study that will lead to an undergraduate or graduate degree, or a recent graduate, in a field of study applicable to the hiring department's specialty. The intern provides assistance to departments by performing a variety of duties related to the intern's career field. Guidelines for extra-help employees also apply to interns.
NON-EXEMPT EMPLOYEE	An employee in a position that is covered under the provisions of the Fair Labor Standards Act regarding minimum wage, overtime, maximum hours, and record keeping.
PART-TIME EMPLOYEE	An administrative employee in a position with a normal workweek that totals at least 20 hours but not more than 39 hours, and not more than 1040 hours annually.
POSITION	Full-time and part-time positions in the Board-approved fiscal year budget.
PROMOTION	Movement of an employee from one position to a different position in a higher salary grade <u>through the recruitment process.</u>
PROMOTION – "IN-FAMILY"	Movement of an employee through recruitment or reclassification to a similar position within the same specialty or "family" series. The duties performed are similar in nature and they continue to be reviewed during the Annual Performance Review Cycle.

RECLASSIFICATION	When a position is changed to a different classification in a higher, lower or the same salary grade, as a result of an evaluation process.
REHIRE	To employ someone who previously terminated his/her employment with OCTA (normally following a voluntary resignation) without restoring prior service.
REINSTATE	To return, within 6 months, an employee, previously terminated due to layoff, to active employment with OCTA and to restore prior service and benefit eligibility, with no formal break in service. Vacation, sick, and holiday hours for which the employee was paid at the time of termination are not restored. (This action is unrelated to retirement service credit).
SALARY RANGE	The minimum and maximum of the salary grade for a position. It is based upon the scope and responsibility of work performed in comparison with other work performed within OCTA and in comparison with the competitive labor market.
TEMPORARY HELP	A person acquired through a temporary help agency to perform work on a limited term basis, not an OCTA employee.
TRANSFER	When an employee retains the same job title and work responsibilities but is moved from one location or section/department to a different location or section/department. Compensation adjustments shall not be granted as a result of an employee transfer unless the criteria for an equity adjustment are met.

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