

**Proposed Changes for the
Personnel and Salary Resolution (PSR) Fiscal Year 2025-26**

Subject	Page(s)	Section	Proposed Change	Reason
Various formatting and language changes				Throughout document; language clarified to align with policies; page numbers and dates updated; percentage formatted for consistency; clarity of document.
Layoff Benefits	8	2.8A	Add clarifying language	Added "...with the exception of Deferred Compensation plans," which are not reinstated to the level prior to layoff.
Personal Leave	17	5.3A	Shorten/simplify section	Simplified section to refer to Personal Leave Policy, as it is being updated.
Additional Retiree Benefit Account Plan	20	5.5C	Update benefit amount for retirees	Annual 2 percent cost adjustment to benefit amount.
Jury Duty	22	5.6E	Add statement to include mileage reimbursement	Added "...except for mileage reimbursement, consistent with state law", as stated in the Jury Duty Policy.
Executive Compensation	27	6.3	Add clarifying language	Clarified the titles that are considered to be executives and their salary ranges.
Titles and Salary Grade Assignments	31-38		Annual update of section	Removed and added salary grade classifications.

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Personnel and Salary Resolution (PSR) FY25-26**

Subject	Page(s)	Section	Proposed Change	Reason
Salary Structure	39		Update salary structure	Annual salary structure adjustment; 2 percent for fiscal year 2025-26.
Appendix A – Glossary of Terms	40		Update titles of executive employees	Added LOSSAN Managing Director and LOSSAN Deputy Managing Director.

PERSONNEL AND SALARY RESOLUTION

FISCAL YEAR 20254-20265

Effective: June 156, 20254

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 924, 20254.

Prepared by:

People and Community Engagement 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.

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 People and Community Engagement (PACE) 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 and is authorized to establish and maintain Human Resources procedures that are consistent with those policies.

Exceptions to the PSR 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.

1.3 STATEMENT OF EQUAL EMPLOYMENT OPPORTUNITY

The Orange County Transportation Authority (OCTA) practices equal employment opportunity and non-discrimination in all personnel actions. The full policy statement can be found in the Appendix to this PSR.

SECTION 2 EMPLOYMENT

2.1 AT-WILL EMPLOYMENT

OCTA employees whose employment is governed by the provisions of this PSR are at-will. The 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 separate their employment at any time without prior notice.

2.2 APPROVAL AUTHORITY FOR EMPLOYEE ACTIONS

The CEO is the AA for the selection and separation 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.

Salary ranges, rates, and employee benefits are reviewed and considered for adjustment annually and more frequently as necessary. 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 will be compensated at an hourly rate to be determined by the AA. A College Intern is not eligible for employee benefits paid by OCTA, except as required by law. The fiscal year 2025-26 Intern pay rates are: full time undergraduate: \$19.00/hour, graduate – \$20.00/hour, master's degree student - \$22.00/hour.

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 that may interfere with a current job role, an employee must obtain written permission from their Department Manager.

2.6 PERFORMANCE PLANNING AND REVIEW PROGRAM

The AA 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~~[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 AA finds it necessary to fill the position.

2.8A LAYOFF BENEFITS

An employee recalled within six months may be reinstated to the same position if the position is available. For purposes of this section, benefits based on length of service, [with the exception of Deferred Compensation plans](#), will be reinstated to the level prior to layoff if an employee is reinstated to the same or a different position within six 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 separation from OCTA due to layoff, all unused or unpaid vacation, personal paid holidays, and sick leave will be paid to the affected employee.

If employment is recalled within six months, health insurance coverage will take effect on the first day of the following month from the rehire date. However, if the granted paid health insurance is still in effect, then coverage will be effective the first day of the month from the return-to-work date.

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 in accordance with their regularly scheduled pay.

SECTION 3

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

3.1 EXEMPT EMPLOYEES

Exempt employees are those 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, except in accordance with the Disaster Pay and Leave Policy.

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

3.2 NON-EXEMPT EMPLOYEES

Non-exempt employees are those in positions that are covered under the provisions of the 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.

3.3 WORKWEEK

The FLSA defines workweek as a period of 168 hours consisting of seven 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 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 workweek 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.

3.4 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.

3.5 OVERTIME

Overtime must be authorized prior to performance of such work. Authorized work performed in excess of eight 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 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.

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 (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.

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 workweek 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, 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, 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 11 hours in a day or more than 40 hours in a workweek, as this will require overtime to be paid. Managers and/or Supervisors are prohibited from encouraging or soliciting an employee to request make-up time.

SECTION 4

BOARD MEMBER BENEFITS AND COMPENSATION

4.1 BOARD MEMBER BENEFITS

The AA 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 ~~Administrative~~administrative employees paid by OCTA, which may change to reflect the current programs offered.

For Board Members who receive health benefits and/or a cash waiver from the public entity they are elected to serve: The Board Members may choose to receive the same health benefits as full-time ~~Administrative~~administrative 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. (Benefit amount reduces at age 75. See Benefits Guide.)

Voluntary Board Member-paid supplemental life insurance may be offered by OCTA for Board Members and/or their dependents. (Benefit amounts reduce at ages 70, 75 and 80. See Benefits Guide.)

4.1E REIMBURSEMENT OF EXPENSES

OCTA will reimburse Board Members and former Board Members who are serving on regional boards at the direction and request of the Board of Directors for actual and necessary expenses incurred in the performance of their duties, as provided in the “Policy for Compensation, Benefits, Reimbursement of Expenses and Mandatory Training for Members of the Board of Directors.”

4.1F COMPENSATION

Board Members and former Board Members, who are serving on regional boards at the direction and request of the Board of Directors, are authorized to receive compensation in the amount of one hundred dollars (\$100) per day, not to exceed five hundred dollars (\$500) in any calendar month, for attending any of the activities outlined in section III of the Policy for Compensation, Benefits, Reimbursement of Expenses and Mandatory Training for Members of the Board of Directors.

4.1G SICK LEAVE

Board Members are eligible for up to five (5) days of paid sick leave in a calendar year. Unused sick leave is not paid out at time of leaving office with the Authority. Board Members who wish to use paid sick leave must notify the Clerk of the Board in advance of not being able to attend a meeting. Sick Leave will be paid in the amount of \$100 per day of absence. For Board Members who have exceeded their maximum payment in a calendar month, no sick leave will be paid.

SECTION 5

EMPLOYEE BENEFITS

5.1 HEALTH, LIFE, AND DISABILITY INSURANCE BENEFITS

5.1A HEALTH INSURANCE

The 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.

Employees who are scheduled to work a minimum of 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.

Administrative 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](#) employee is not eligible if he/she is covered under an OCTA medical, dental or vision plan.

5.1B 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 times the annual salary, for a maximum benefit of \$500,000. Voluntary employee-paid supplemental life insurance may be offered by OCTA for employees and/or eligible dependents (IRS). (Benefit amounts reduce at ages 70, 75, and 80. See Benefits Guide.)

5.1C DISABILITY INSURANCE

Employer-paid short-term disability and long-term disability insurance programs will be provided to full-time and part-time employees. Coordination of state provided disability payments may be required.

5.1D SURVIVOR BENEFIT

When OCTA is notified of the death of an employee, his/her dependents who were previously enrolled dependents, may be eligible for coverage in accordance with the provisions of the Consolidated Omnibus Budget Reconciliation Act (COBRA). If eligible for

COBRA, OCTA will reimburse the cost of the OCTA-sponsored health benefit plan premium to the dependent(s) for a maximum of three months.

5.1E COBRA AND CONTINUED COVERAGE

All full-time or part-time employees separating employment may elect 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 separates employment.

5.1F CONTINUATION OF 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% percent](#) of the full monthly premium. Current group health benefits may continue up to age 65.

An employee who defers 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 5.5 C.

5.2 MISCELLANEOUS BENEFITS

5.2A EMPLOYEE RECREATION ASSOCIATION

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

5.2B EMPLOYEE USE OF TRANSPORTATION SYSTEM

The AA has established policies and procedures regarding employees and eligible dependents' free transportation on OCTA's transportation services. See the [“Employee Identification Badge and Dependent Transportation Pass Policy.”](#)

5.2C 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 AA 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 5.4A.

5.2D 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.

5.2E PROFESSIONAL LICENSES AND CERTIFICATES

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

5.2F RECOGNITION AND AWARD PROGRAMS

The AA 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.

5.3 LEAVES OF ABSENCE

Leaves of absence may be granted by the AA 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."

5.3A PERSONAL LEAVE

When requested, the AA may grant a personal leave of absence without pay, for non-medical reasons, on a case-by-case basis, once all accrued/benefit hours have been exhausted, including vacation hours, sick hours, and Personal Paid Holiday (PPH) hours. See Personal Leave of Absence Policy.

~~When requested, the 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 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 position. If the personal leave of absence extends for more than~~

~~30 calendar days, OCTA will not guarantee the employee's position or employment with OCTA but will attempt to reinstate the employee to a like or similar position for which the employee is qualified.~~

~~During the initial 30 calendar days following the date on which the personal leave of absence begins, OCTA will continue to offer life insurance, medical, dental and vision benefits at the same employee coverage cost and the same contribution for dependent premiums at the current applicable 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.~~

~~After the initial 30 day period, the employee will be required to remit in advance each month, 100 percent 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 percent of the monthly cost of the group insurance premiums for the month in which the employee returns to work.~~

5.4 REIMBURSEMENTS AND ALLOWANCES

5.4A AUTOMOBILE ALLOWANCE 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 vehicles on a 24-hour basis to designated positions, in accordance with the "Non-Revenue Vehicle Fleet Policy." Each OCTA operating base and administrative facility will be assigned a pool of non-revenue vehicles for authorized OCTA business. Special purpose vehicles will be assigned to a division based on business need as referenced in the "Non-Revenue Vehicle Fleet Policy."

5.4B 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 AA will be responsible for developing, administering, and maintaining the program.

As authorized by the “Educational Reimbursement Program Policy,” a full-time employee who satisfactorily completed approved, work-related educational courses as defined in the Educational Reimbursement Program Policy, will be reimbursed in full for eligible expenses up to a maximum of \$5,250 per calendar year. Increases to the tuition reimbursement amount will not exceed the IRS tax-free amount (currently \$5,250). If an employee separates employment or gives notice of separation prior to completion of the course, no reimbursement will be made. Newly hired employees may be eligible for educational reimbursement after six months of employment.

5.4C UNIFORMS

An administrative employee 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 division.

5.4D SAFETY SHOES

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

5.5 RETIREMENT AND DEFERRED COMPENSATION

5.5A DEFERRED COMPENSATION

OCTA may provide all full-time, part-time, and extra-help employees with a deferred compensation program. The Deferred Compensation program is a benefit available to eligible employees to help them to save for retirement. The AA 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 OCTA 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 a lump sum contribution for designated positions.

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
New Hire but less than 3	1%
3 but less than 5	2%
5 or more	3%

In addition to the above scale, employees in Salary Grade 260 and above, including executive employees, will receive an employer-paid matching contribution of up to 2.0% 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.

5.5B 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. All employees shall pay 100% percent of the OCERS employee contribution rate each pay period.

5.5C ADDITIONAL RETIREE BENEFIT ACCOUNT PLAN

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

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

For retirees after January 1, 1995 and through June 30, 2023

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

For retirees on or after July 1, 2023

The benefit amount on July 1, 20254 is \$36.41~~35.70~~ per month, per year of service, not to exceed a monthly benefit of \$546.21~~535.50~~. Retirees will receive a 2.0% cost adjustment on July 1 of each year.

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.

5.6 TIME OFF BENEFITS

5.6A TIME OFF 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.

5.6B BEREAVEMENT LEAVE

In accordance with the “Bereavement Leave Policy,” a full-time or part-time employee will be granted paid bereavement leave, up to five regularly scheduled workdays, upon the death of an immediate family member, consistent with the Bereavement Leave Policy.

The paid bereavement leave will not be chargeable to sick leave or vacation. The 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 AA and will be charged against accrued sick or vacation leave.

An employee may take up to five days of reproductive loss leave following a reproductive loss event, consistent with California law and the Bereavement Leave Policy.

5.6C CATASTROPHIC LEAVE DONATIONS

Employees may elect to donate accrued sick and/or vacation leave for use by an employee who has met the eligibility requirements under the Catastrophic Leave Policy. For a detailed description, please refer to the “Catastrophic Leave Policy.”

5.6D HOLIDAYS AND PERSONAL PAID HOLIDAYS

OCTA will observe 12 paid holidays consisting of designated holidays and Personal Paid Holidays (PPH) as determined by the CEO. Annually, the listing of holidays observed for the year will be posted on the OCTA Intranet.

A full-time, non-exempt employee will receive the equivalent of 12 days of holiday pay at his/her regular rate during the calendar year. A full-time non-exempt employee who works an alternative 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 holidays observed 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 separation or retirement. The maximum number of PPHs that an employee may accrue will be two days over the current calendar year's entitlement. For new hires, the PPH accrual schedule for their first year will be posted on the OCTA Intranet and given to them during orientation.

5.6E 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, except for mileage reimbursement, consistent with state law.

5.6F 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 consistent with the Sick Leave Policy and state and federal law.

A full-time 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

A part-time 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:

Accrual Rate	Approximate Accrual
.04 Hours	40 hours 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 separates service.

An employee who separates from OCTA with ten 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 the death of an employee, the 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 years or more of continuous service and is in good standing with OCTA, 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 of his/her separation. This benefit does not apply to deferred retirement.

Upon separation 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 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-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 and Interns

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

leave is not paid out at time of separation from employment. However, employees who are re-employed with OCTA within a year of separation will have their accrued unused bank of sick time made available to them immediately upon re-employment.

Sick leave may be used for an absence from employment consistent with the Sick Leave Policy and state and federal law.

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
.04 Hours	40 hours per year

5.6G 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.

5.6H 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 separates employment.

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

Upon hire, an employee with less than two years of service will earn .0577 hours of vacation leave for each straight time hour of pay in a regularly scheduled workweek, unless otherwise approved by the 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.

The maximum allowable accrued vacation leave at any time for full-time or part-time employees is listed below.

At the Beginning of Year:	The Employee Shall Earn:	To a Maximum Per Year of:	Maximum Accrued Vacation Leave
0 through year 2	.0577 hours	120 hours	240 hours
3 through year 4	.0577 hours	120 hours	300 hours
5 through year 9	.0770 hours	160 hours	300 hours
10 through year 14	.0962 hours	200 hours	390 hours
15 through year 18	.1039 hours	216 hours	390 hours
19 or more	.1154 hours	240 hours	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.

5.6I 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 AA may authorize a cash value payment to an employee for an amount up to the total amount of accrued vacation.

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

SECTION 6 COMPENSATION

6.1 COMPENSATION 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.

6.1A 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; and
- 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.

6.1B 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.

6.2 ADMINISTRATION OF COMPENSATION

The 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 AA, compensation adjustments may be given:

- as an increase to base pay; and
- in a lump sum payment.

The AA is authorized to adjust an incumbent's salary.

6.3 EXECUTIVE COMPENSATION

The salary of each executive employee will be determined by the CEO. The salary range for the following titles are noted below:

Chief Financial Officer
Chief Operating Officer
Deputy CEO
Executive Director
General Manager
LOSSAN Managing Director

The current salary range for the above-mentioned titles is \$212,014.40 (\$101.93/hour) - \$376,334.40 (\$180.93/hour).

Directors and the LOSSAN Deputy Managing Director are also considered executive employees. The salary range that they are assigned to is salary grade 285 (refer to salary grade table on Page 37).
~~The salary of each Executive employee will be determined by the CEO. The salary range for the following titles are noted below:~~

~~Chief Financial Officer~~
~~Chief Operating Officer~~
~~Deputy CEO~~
~~Executive Director~~
~~General Manager~~
~~LOSSAN Managing Director~~

~~The fiscal year 2024-25 salary range for the above-mentioned titles is \$200,012.80 (\$96.16/hour) - \$355,014.40 (\$170.68/hour).~~

6.4 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 260 and above, for employee salary increases over 10.0% ten percent or for executive level salaries. All

promotions and salary increases must have an effective date that is the first day of a pay period.

For new hires, after six months of employment, the employee's performance will be evaluated.

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.

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

6.5 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. {Refer to the Reclassification Policy}.

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 AA, may retain his/her salary paid prior to the reclassification.

6.6 CLASSIFICATION TITLES

All filled positions must have classification titles that are included in the PSR. 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.

6.7 MERIT ADJUSTMENTS

For fiscal year 20254-265, a pool for merit-based salary increases of 4.0% has been established for administrative positions, based on the availability of financial resources, as approved by the Board of Directors.

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."

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 PSR.

6.8 SPECIAL PERFORMANCE AWARDS

For fiscal year 202~~54~~-2~~65~~, a special performance award pool of 4.~~0~~% has been established for administrative positions based on the availability of financial resources, as approved by the Board of Directors.

Should a special performance award pool be established, the 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 months of employment are not eligible to receive a Special Performance Award. An employee may not receive over ~~6.0%~~ ~~six percent~~ of their total salary in Special Performance Awards per fiscal year.

6.9 TEMPORARY ASSIGNMENTS

Performing Additional Duties of a Different Classification

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 ~~5.0%~~ ~~five percent~~ per salary grade for the difference between the employee's current classification and the temporary assignment. Same salary grade temporary increases are limited to a maximum of ~~5.0%~~ ~~five percent~~. 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.

Performing Duties Critical to the Organization

At the sole discretion of the CEO, when an employee is performing duties critical to the organization during a crucial project or period of time, a temporary increase or stipend can be used to incentivize the key employee to remain at OCTA. This compensation can be in the form of a percentage of base salary, one or more lump sum amounts, or an additional employer non-matching deferred compensation contribution. The CEO must provide written authorization, by way of a memo, which includes the justification and time period for which this will be in effect. The amount and type of compensation will be determined by the CEO and reviewed annually or when the critical duties are no longer being performed.

6.10 EQUITY ADJUSTMENTS

The 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.

TITLES AND SALARY GRADE ASSIGNMENTS

Class Title	Salary Grade
Accountant	185
Accountant, Associate	175
Accountant, Principal	205
Accountant, Senior	195
Accounting Specialist	155
Accounting Specialist, Associate	145
Accounting Specialist, Senior	165
Administrative Specialist	160
Analysis Project Manager	205
Applications Analyst	200
Applications Analyst, Associate	190
Applications Analyst, Principal	220
Applications Analyst, Senior	210
Asset Management Administrator	155
Assistant Base Manager	215
Base Manager	235
Benefits Specialist	185
Benefits Specialist, Associate	175
Benefits Specialist, Principal	215
Benefits Specialist, Senior	205
Bid Coordinator	190
Bus Operations Supervisor	190
Business Computing Solutions Specialist	205
Business Computing Solutions Specialist, Associate	195
Business Computing Solutions Specialist, Lead	225
Business Computing Solutions Specialist, Senior	215
Business Intelligence Analyst	205
Business Intelligence Analyst, Associate	195
Business Intelligence Analyst, Senior	215
Business Systems Analyst	195
Business Systems Analyst, Associate	185
Business Systems Analyst, Principal	215
Business Systems Analyst, Senior	205
Business Unit Analyst	185
Business Unit Analyst, Associate	175
Business Unit Analyst, Principal	205
Business Unit Analyst, Senior	195

<u>Business Unit Specialist</u>	<u>170</u>
Buyer	180
Buyer, Associate	170
Buyer, Senior	190
Civil Engineer	215
Civil Engineer, Principal	235
Civil Engineer, Senior	225
Claims Manager	220
Claims Representative	180
Claims Representative, Associate	170
Claims Representative, Senior	190
Clerk of the Board Specialist	175
Clerk of the Board Specialist, Assistant	165
Clerk of the Board Specialist, Principal	190
Clerk of the Board Specialist, Senior	180
<u>Coach Operator Instructor</u>	<u>190</u>
Communications Department Manager, Senior	280
Communications Specialist	190
Communications Specialist, Associate	180
Communications Specialist, Principal	210
Communications Specialist, Senior	200
Community Relations Specialist	175
Community Relations Specialist, Associate	165
Community Relations Specialist, Principal	195
Community Relations Specialist, Senior	185
Community Transportation Coordinator	195
Community Transportation Coordinator, Principal	215
Community Transportation Coordinator, Senior	205
Compensation Analyst	190
Compensation Analyst, Associate	180
Compensation Analyst, Principal	210
Compensation Analyst, Senior	200
Construction Safety Section Manager	235
Construction Safety Specialist, Principal	210
Contract Analyst	205
Contract Administrator, Principal	215
Contract Administrator, Senior	205
Contract Administrator	195
Contract Administrator, Associate	185
Creative Services Specialist	170
Creative Services Specialist, Associate	160

Creative Services Specialist, Principal	190
Creative Services Specialist, Senior	180
Customer Relations Representative	130
Customer Relations Representative, Senior	140
Customer Relations Specialist	160
Customer Relations Specialist, Associate	150
Customer Relations Specialist, Senior	170
Cyber Security Analyst	200
Cyber Security Analyst, Associate	190
Cyber Security Analyst, Senior	210
Cyber Security Compliance Analyst	195
Cyber Security Compliance Analyst, Associate	185
Cyber Security Compliance Analyst, Senior	205
Cyber Security Engineer, Associate	205
Cyber Security Engineer	210
Cyber Security Engineer, Senior	220
Cyber Security Intrusion Analyst	200
Cyber Security Intrusion Analyst, Associate	190
Cyber Security Intrusion Analyst, Senior	210
Cyber Security Risk Analyst	200
Cyber Security Risk Analyst, Principal	220
Cyber Security Risk Analyst, Senior	210
Data Warehouse Architect	215
Data Warehouse Architect, Associate	205
Data Warehouse Architect, Principal	235
Data Warehouse Architect, Senior	225
Database Administrator	205
Database Administrator, Principal	225
Database Administrator, Senior	215
DBE (Disadvantaged Business Enterprise) Specialist	185
DBE (Disadvantaged Business Enterprise) Specialist, As	175
DBE (Disadvantaged Business Enterprise) Specialist, Se	195
Department Manager	260
Department Manager, Senior	270
Deputy Treasurer	230
Desktop Support Technician	180
Desktop Support Technician, Associate	170
Desktop Support Technician, Senior	190
Desktop Support Technician, Principal	200
Digital/Reprographic Specialist	150
Digital/Reprographic Specialist, Senior	160

Director	285
Emergency Management Specialist	210
Employee Programs Administrator	190
Employee Programs Specialist	175
Employee Relations Representative	190
Employee Relations Representative, Associate	180
Employee Relations Representative, Principal	210
Employee Relations Representative, Senior	200
Executive Assistant I	160
Executive Assistant II	170
Executive Assistant III	175
Executive Assistant IV	180
Executive Assistant V	190
Facilities Maintenance Supervisor	205
Field Administrator	180
Field Administrator, Associate	170
Field Administrator, Senior	190
Financial Analyst	195
Financial Analyst, Associate	185
Financial Analyst, Principal	215
Financial Analyst, Senior	205
Fleet Analyst	175
Fleet Analyst, Associate	165
Fleet Analyst, Senior	185
General Services Specialist	145
General Services Specialist, Assistant	135
General Services Specialist, Senior	155
GIS Analyst	195
GIS Analyst, Associate	185
GIS Analyst, Principal	215
GIS Analyst, Senior	205
Government Relations Representative	195
Government Relations Representative, Associate	185
Government Relations Representative, Principal	215
Government Relations Representative, Senior	205
Grants Technician	155
Health, Safety & Compliance Specialist, Associate	185
Health, Safety & Environmental Compliance Specialist	195
Health, Safety & Environmental Compliance Specialist, P	215
Health, Safety & Environmental Compliance Specialist, S	205
Human Resources Assistant	160

Human Resources Business Partner	195
Human Resources Business Partner, Associate	185
Human Resources Business Partner, Senior	205
Human Resources Business Partner, Principal	215
Human Resources Representative	185
Human Resources Representative, Associate	175
Human Resources Representative, Senior	195
Internal Audit, Senior Manager	245
Internal Auditor	205
Internal Auditor, Associate	195
Internal Auditor, Principal	225
Internal Auditor, Senior	215
Inventory Analyst	190
IS Business Strategist	230
IS Enterprise Architect	225
IS Project Manager I	210
IS Project Manager II	220
IS Project Manager III	230
IS Project Manager, Senior	240
Learning & Development Administrator, Principal	205
Learning & Development Administrator, Senior	195
Learning and Development Administrator	185
Learning and Development Administrator, Associate	175
LOSSAN Accounting Analyst	185
LOSSAN Accounting Analyst, Associate	175
LOSSAN Accounting Analyst, Senior	195
LOSSAN Capital Program Manager	255
LOSSAN Deputy Managing Director	285
LOSSAN Equipment and Mechanical Manager	235
LOSSAN Executive Administrative Assistant	175
<u>LOSSAN Financial Analyst</u>	<u>195</u>
<u>LOSSAN Financial Analyst, Associate</u>	<u>185</u>
<u>LOSSAN Financial Analyst, Principal</u>	<u>215</u>
<u>LOSSAN Financial Analyst, Senior</u>	<u>205</u>
<u>LOSSAN Financial Planning & Analysis Manager</u>	<u>255</u>
LOSSAN Finance and Administration Manager	260
LOSSAN Marketing and Communications Manager	220
LOSSAN Marketing Specialist	180
LOSSAN Marketing Specialist, Associate	170
LOSSAN Marketing Specialist, Principal	200
LOSSAN Marketing Specialist, Senior	190

LOSSAN Operations Compliance and Safety Manager	245
LOSSAN Planning & Communication Manager	260
LOSSAN Planning and Analysis Manager	245
LOSSAN Program Manager	255
LOSSAN Programming & Grants Manager	255
LOSSAN Project Manager, Senior	240
LOSSAN Senior Manager, Finance & Administration	270
LOSSAN Transportation Analyst	195
LOSSAN Transportation Analyst, Associate	185
LOSSAN Transportation Analyst, Principal	215
LOSSAN Transportation Analyst, Senior	205
LOSSAN Transportation Funding Analyst	195
LOSSAN Transportation Funding Analyst, Associate	185
LOSSAN Transportation Funding Analyst, Principal	215
LOSSAN Transportation Funding Analyst, Senior	205
<u>M2 PMO Manager</u>	<u>245</u>
Maintenance Field Administrator	200
Maintenance Field Administrator, Principal	220
Maintenance Field Administrator, Senior	210
Maintenance Instructor	200
Maintenance Instructor, Senior	210
Maintenance Planner	190
<u>Maintenance Planner, Senior</u>	<u>200</u>
Maintenance Resource Analyst	185
Maintenance Resource Analyst, Senior	195
Maintenance Supervisor	205
Marketing Specialist	180
Marketing Specialist, Assistant	160
Marketing Specialist, Associate	170
Marketing Specialist, Principal	200
Marketing Specialist, Senior	190
Materials Management Planner	190
Network Administrator	200
Network Administrator, Associate	190
Network Administrator, Principal	220
Network Administrator, Senior	210
Network Analyst	200
Network Analyst, Associate	190
Network Analyst, Senior	210
Office Specialist	145
Office Specialist, Assistant	135

Office Specialist, Senior	155
On-Board Evaluator	125
Operations Analyst, Principal	205
Operations Project Manager	230
Pass Sales Coordinator	165
Payroll Administrator	180
Program Management Analyst	195
Program Management Analyst, Associate	185
Program Management Analyst, Principal	215
Program Management Analyst, Senior	205
Program Manager	260
Program Manager, Senior	270
Programming & Grants Development Manager	245
LOSSAN Program Manager, Senior	270
Programmer Analyst	190
Programmer Analyst, Associate	180
Programmer Analyst, Senior	200
Project Controls Analyst, Associate	180
Project Controls Analyst	190
Project Controls Analyst, Principal	210
Project Controls Analyst, Senior	200
Project Manager I	210
Project Manager II	220
Project Manager III	230
Project Manager, Senior	240
Public Records Administrator	170
Public Records Administrator, Associate	160
<u>Radio & Field Specialist</u>	<u>190</u>
<u>Radio & Field Specialist, Lead</u>	<u>195</u>
Rail Maintenance-of-Way Administrator	185
Rail Maintenance-of-Way Administrator, Senior	195
Rail Systems Safety Specialist, Principal	215
Real Property Agent	185
Real Property Agent, Associate	175
Real Property Agent, Principal	205
Real Property Agent, Senior	195
Real Property Department Manager, Senior	280
Records Administrator	160
Records Administrator, Senior	170
Revenue Administrator	185
Revenue Administrator, Associate	175

Revenue Administrator, Principal	205
Revenue Administrator, Senior	195
Schedule Analyst	180
Schedule Analyst, Associate	170
Schedule Analyst, Senior	190
Schedule Analyst, Principal	200
Section Manager I	210
Section Manager II	220
Section Manager III	235
Section Manager, Senior	245
Section Supervisor I	185
Section Supervisor II	195
Section Supervisor, Senior	205
Security Systems Administrator	195
Security Systems Administrator, Associate	185
Security Systems Administrator, Senior	205
Senior Real Property Manager	280
Senior Strategic Communications Manager	280
Service Planning Analyst	195
Service Planning Analyst, Principal	215
Service Planning Analyst, Senior	205
SharePoint System Architect	210
SMS (Safety Management System) Program Manager	220
Stops and Zones Analyst	185
Stops and Zones Analyst, Associate	175
Stops and Zones Analyst, Principal	205
Stops and Zones Analyst, Senior	195
Stops and Zones Planner	185
Stops and Zones Planner, Associate	175
Stops and Zones Planner, Senior	195
Strategic Plan Administrator	245
Systems Engineer	205
Systems Engineer, Associate	195
Systems Engineer, Senior	215
Talent Acquisition Specialist	185
Talent Acquisition Specialist, Associate	175
Talent Acquisition Specialist, Principal	205
Talent Acquisition Specialist, Senior	195
Telecommunications Administrator	180
Telecommunications Technician	180
Transit Project Manager I	210

Transit Project Manager II	220
Transit Project Manager III	230
<u>Transit Technical Services Supervisor</u>	<u>210</u>
Transportation Analyst	195
Transportation Analyst, Associate	185
Transportation Analyst, Principal	215
Transportation Analyst, Senior	205
Transportation Funding Analyst	195
Transportation Funding Analyst, Associate	185
Transportation Funding Analyst, Principal	215
Transportation Funding Analyst, Senior	205
Transportation Funding Specialist	165
Transportation Modeling Analyst	195
Transportation Modeling Analyst, Associate	185
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SALARY STRUCTURE

OCTA Salary Grade	Annual			Hourly		
	Min	Mid	Max	Min	Mid	Max
100	35,110.40	41,953.60	48,776.00	16.88	20.17	23.45
105	36,899.20	44,075.20	51,251.20	17.74	21.19	24.64
110	38,729.60	46,259.20	53,788.80	18.62	22.24	25.86
115	40,664.00	48,588.80	56,492.80	19.55	23.36	27.16
120	42,681.60	51,001.60	59,300.80	20.52	24.52	28.51
125	44,824.00	53,560.00	62,275.20	21.55	25.75	29.94
130	47,070.40	56,222.40	65,374.40	22.63	27.03	31.43
135	49,420.80	59,051.20	68,660.80	23.76	28.39	33.01
140	51,896.00	61,984.00	72,072.00	24.95	29.80	34.65
145	54,496.00	65,104.00	75,691.20	26.20	31.30	36.39
150	57,200.00	68,348.80	79,476.80	27.50	32.86	38.21
155	60,070.40	71,760.00	83,449.60	28.88	34.50	40.12
160	63,086.40	75,358.40	87,609.60	30.33	36.23	42.12
165	66,227.20	79,123.20	91,998.40	31.84	38.04	44.23
170	69,555.20	83,096.00	96,616.00	33.44	39.95	46.45
175	73,028.80	87,235.20	101,420.80	35.11	41.94	48.76
180	76,668.80	91,582.40	106,496.00	36.86	44.03	51.20
185	80,516.80	96,179.20	111,820.80	38.71	46.24	53.76
190	84,531.20	100,984.00	117,416.00	40.64	48.55	56.45
195	88,753.60	106,038.40	123,302.40	42.67	50.98	59.28
200	93,204.80	111,342.40	129,459.20	44.81	53.53	62.24
205	97,864.00	116,896.00	135,928.00	47.05	56.20	65.35
210	102,752.00	122,740.80	142,708.80	49.40	59.01	68.61
215	107,889.60	128,876.80	149,864.00	51.87	61.96	72.05
220	113,276.80	135,324.80	157,352.00	54.46	65.06	75.65
225	118,934.40	142,084.80	165,214.40	57.18	68.31	79.43
230	124,883.20	149,177.60	173,472.00	60.04	71.72	83.40
235	131,123.20	156,644.80	182,145.60	63.04	75.31	87.57
240	137,696.00	164,486.40	191,256.00	66.20	79.08	91.95
245	144,580.80	172,702.40	200,824.00	69.51	83.03	96.55
250	151,798.40	181,334.40	210,849.60	72.98	87.18	101.37
255	159,390.40	190,403.20	221,395.20	76.63	91.54	106.44
260	167,356.80	199,929.60	232,481.60	80.46	96.12	111.77
265	175,718.40	209,913.60	244,088.00	84.48	100.92	117.35
270	184,496.00	220,396.80	256,297.60	88.70	105.96	123.22
275	193,731.20	231,420.80	269,110.40	93.14	111.26	129.38
280	203,424.00	243,006.40	282,568.00	97.80	116.83	135.85
285	213,595.20	255,153.60	296,691.20	102.69	122.67	142.64
290	224,265.60	267,904.00	311,521.60	107.82	128.80	149.77
295	235,476.80	281,299.20	327,100.80	113.21	135.24	157.26

APPENDIX A – GLOSSARY OF TERMS

ADMINISTRATIVE EMPLOYEE	Any employee of OCTA not covered by a collective bargaining agreement.
APPOINTING AUTHORITY	The CEO; he/she may delegate this responsibility.
AT-WILL EMPLOYMENT	An employee's employment status may be changed, including, but not limited to, separation of employment, by OCTA or the employee, at any time for any reason.
BOARD	The Board of Directors of OCTA.
CATASTROPHIC LEAVE	An extended leave due to an employee's own serious illness or medical condition, or that of an immediate family member where the employee is the primary caregiver, 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 CEO, Deputy CEO, COO, CFO, Executive Director, Director, and General Manager, LOSSAN Managing Director , and LOSSAN Deputy Managing Director .
EXEMPT EMPLOYEE	An employee in a position that is not covered under the provisions of the 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 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 FLSA 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 through the recruitment process.
PROMOTION – "IN-FAMILY"	Movement of an employee through recruitment 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 separated his/her employment with OCTA (normally following a voluntary resignation) without restoring prior service.
REINSTATE	To return, within six months, an employee, previously separated 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 separation 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.

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APPENDIX C – STATEMENT OF EQUAL EMPLOYMENT OPPORTUNITY (EEO)



Orange County Transportation Authority Statement of Equal Employment Opportunity Policy

The Orange County Transportation Authority (OCTA) practices equal employment opportunity and non-discrimination in all personnel actions. As part of the commitment to equal employment opportunity and affirmative action, OCTA has developed and periodically updates this written nondiscrimination program and makes the Equal Employment Opportunity Program and Affirmative Action Plan (EEO/AAP) available for inspection. All new hires receive copies of the OCTA EEO and Workplace Harassment Prevention Policies, and the policies are posted at each work location.

As OCTA's Chief Executive Officer, I maintain overall responsibility and accountability for OCTA's compliance with its EEO/AAP. To ensure day-to-day management, including program preparation, monitoring, and complaint investigation, I have appointed Maggie McJilton, Executive Director of People and Community Engagement (PACE) as EEO Officer under the title of Federal Compliance Officer. Ms. McJilton reports directly to me and acts with my authority with all levels of management, labor unions, and employees.

All employees are informed that the EEO Officer is Maggie McJilton, Executive Director of PACE, under the title of Federal Compliance Officer. Employees with concerns or questions about the OCTA EEO/AAP, EEO Policy, and/or Workplace Harassment & Discrimination Prevention Policy are encouraged to contact the Federal Compliance Officer or an Employee Relations Representative in the Labor and Employee Relations/Human Resources Department.

The Federal Compliance Officer meets periodically with appropriate management to discuss EEO responsibilities, review the EEO/AAP progress, and to develop personnel action alternatives, if required. The Federal Compliance Officer and her staff also have the responsibility of the EEO/AAP annual and semiannual updates. All OCTA executives, management, and supervisory personnel share the responsibility of implementing and monitoring OCTA's EEO Policy and Program within their respective areas and will be assigned specific tasks to ensure compliance is achieved. OCTA will evaluate its managers' and supervisors' performance on their successful implementation of OCTA's policies and procedures, in the same way OCTA assesses their performance regarding other agency's goals. All of these actions support the OCTA practice of equal opportunity in employment. The OCTA EEO Policy includes, without limitation, the following commitments:

- I. To continue to provide equal employment opportunity to all qualified persons and to continue to recruit, hire, train, promote, and compensate qualified persons in all jobs without regard to race, color, religion, creed, ancestry, national origin, age, sex, pregnancy, gender, gender identity and/or expression, sexual orientation, marital status, medical condition, disability, genetic information, military and veteran status, or other legally protected status as established by federal or state law.
- II. To periodically audit and evaluate all areas of its employment practices under the principles of equal employment opportunity, as well as identify and analyze possible problem areas. Examples of employment practices that are reviewed include the following:
 - A. Recruitment and Selection – The recruitment, testing and hiring of all personnel will be non-discriminatory with regard to race, color, religion, creed, ancestry, national origin, age, sex, pregnancy, gender, gender identity and/or expression, sexual orientation, marital status, medical condition, disability, genetic information, military and veteran status, or other protected status as established by federal or state law. Selections of hiring candidates are based on knowledge, skills, abilities, and qualifications for the job.
 - B. To provide reasonable accommodations to applicants and employees who need them because of a disability or to practice or observe their religion, absent undue hardship.
 - C. Promotions – Individuals will continue to be upgraded and promoted on the basis of their abilities, skills, knowledge, experience, and performance. OCTA will continue to ensure that qualified minority and women employees, as well as those who can qualify through training, are considered for promotion. In making promotion decisions, the supervisors directly involved will ensure that promotions are based on valid occupational qualifications.
 - D. Transfers – The OCTA transfer application procedures are administered by the Human Resources Department. The transfer application procedure assures that qualified transfer applicants will be considered with other candidates for vacant positions, thus increasing greater job opportunities for qualified employees.
 - E. Layoffs – Should reductions in the OCTA workforce become necessary, layoffs will be based on nondiscriminatory factors. OCTA will consider each individual scheduled to be affected by a layoff to assure compliance with this policy and each applicable collective bargaining agreement and will make every good faith effort to ensure that minorities and women are treated in a nondiscriminatory manner.

- III. To continue to administer personnel programs in areas such as compensation, company-sponsored training, education tuition reimbursement, and social and recreational programs without regard to race, color, religion, creed, ancestry, national origin, age, sex, pregnancy, gender, gender identity and/or expression, sexual orientation, marital status, medical condition, disability, genetic information, military and veteran status, or other protected status as established by federal or state law.
- IV. To promulgate and administer the OCTA employee benefit plans, including retirement, pension, disability, and insurance benefits, in conformity with applicable regulations of appropriate regulatory agencies and consistent with federal and state laws.
- V. To review and update the EEO/AAP annually. EEO/AAP updates will be reviewed with appropriate management personnel, and a mid-year Interim Report will be provided to management to assist in measuring the status of the EEO/AAP target goals. OCTA periodically reviews personnel actions and publishes the results in the EEO/AAP.
- VI. All employment actions include but are not limited to recruitment or recruitment advertising, hiring, selection for training, promotion, transfer, demotion, layoff, termination, rates of pay or other forms of compensation, and any treatment of employees will be administered without regard to race, color, religion, creed, ancestry, national origin, age, sex, pregnancy, gender, gender identity and/or expression, sexual orientation, marital status, medical condition, disability, genetic information, military and veteran status, or other protected status as established by federal or state law.

All applicants and employees have the right to file complaints alleging discrimination. Retaliation against an individual who files a charge or complaint of discrimination, participates in an employment discrimination proceeding (such as an investigation or lawsuit), or otherwise engages in protected activity is strictly prohibited and will not be tolerated.

As previously stated, OCTA prohibits workplace harassment, including sexual harassment, which is a form of gender discrimination. OCTA prohibits discrimination on the basis of gender and race (among other protected categories under the California Fair Employment and Housing Act and Title VII) and management has been made aware of this requirement. Among other forms of discrimination that undermine equal opportunity are religious and national origin discrimination. Religious and national origin discrimination are not tolerated at OCTA. Also included are OCTA's EEO/AAP and Workplace Harassment & Discrimination Prevention Policy with accompanying respective memos notifying all personnel of said OCTA policies.

The contact information for the Federal Compliance Officer (EEO Officer) is as follows:

Maggie McJilton, Executive Director, People and Community Engagement

Address: 550 South Main Street
PO Box 14184
Orange, CA 92863-1584

Telephone: (714) 560-5824

Email: mmcjilton@octa.net

I am personally committed to a workplace that acts upon its daily responsibility to treat all applicants and employees with dignity and respect, as well as equitably under the guidelines of our EEO Policy and Program.



Darrell E. Johnson
Chief Executive Officer
Orange County Transportation Authority

2/26/2024

Date