

# NCRTD OPERATIONS PROFILE

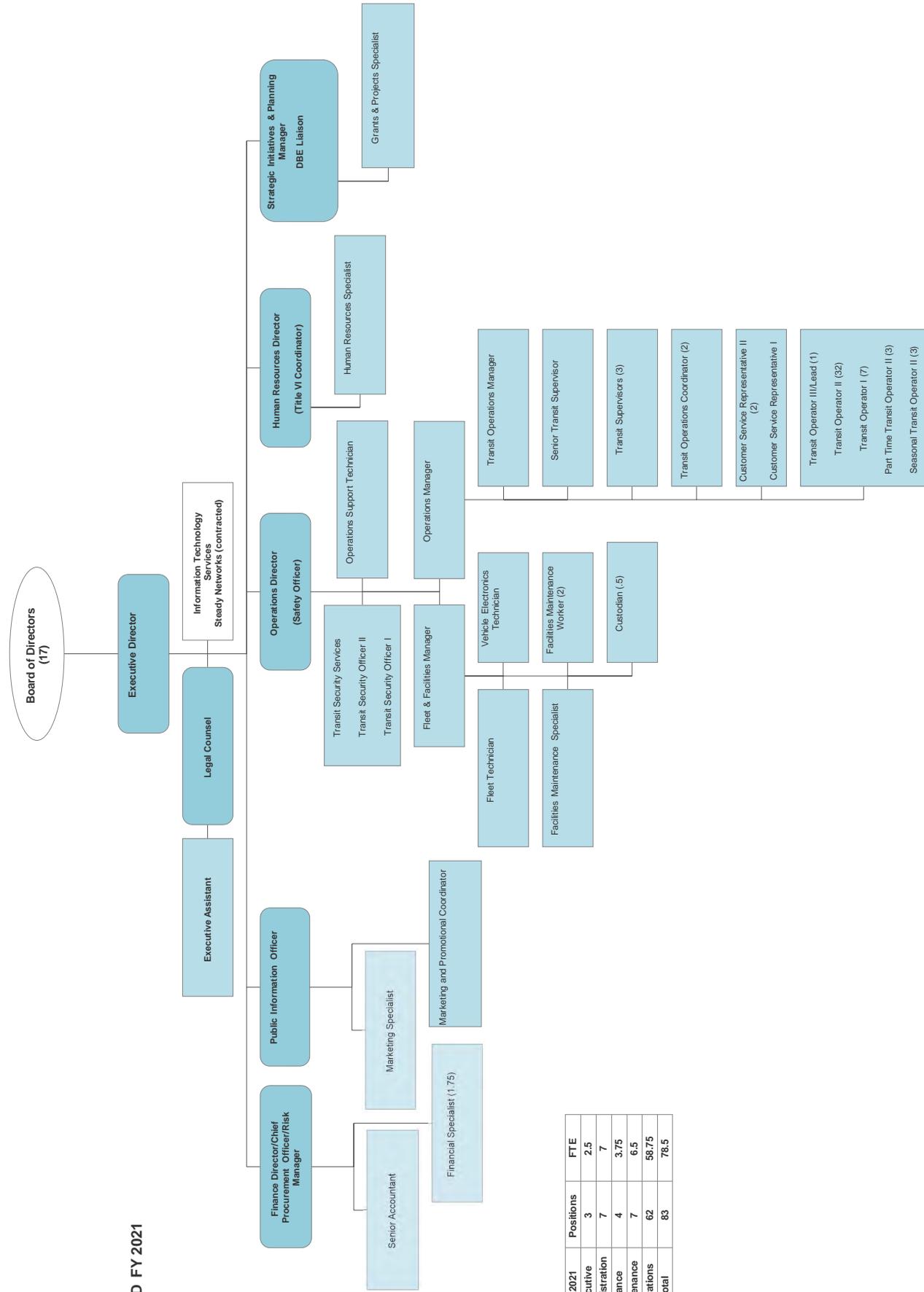
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# 1. Organizational Structure

See next page.

NCRTD FY 2021



FY 2021	Positions	FTE
Executive	3	2.5
Administration	7	7
Finance	4	3.75
Maintenance	7	6.5
Operations	62	58.75
<b>Total</b>	<b>83</b>	<b>78.5</b>

## 2. Mission Statement

The mission of the North Central Regional Transit District is to provide safe, secure and effective public transportation within North Central New Mexico in order to enhance the quality of life of our citizens by providing mobility options and spur economic development throughout the region.

(e) Route design, (f) Schedule, (g) Fare structure

NCRTD Routes are summarized below. Detailed policies and schedules for NCRTD services can be found on NCRTD's website.

Service Type	# of Routes	Description	Routes	Schedule	Fare Structure (determined by Board)	Reservations
<b>Fixed</b>	3	Buses do not deviate from "fixed" paths, stops and timetables.	100 Riverside; 110 Westside/Crosstown; and 340 Chile Line Red	Varies, most routes run Monday through Friday	Free	No reservation necessary.
<b>Fixed Flex</b>	23	Buses have "fixed" paths, stops and timetables, but will deviate up to 3/4 of a mile from course for a pre-scheduled request	See NCRTD website for names and schedules.	Varies, most routes run Monday through Friday	21 routes are free; 2 premium routes charge b/w \$2 and \$5; flex service on all 23 routes cost \$10	No reservations necessary if passenger does not request deviation or "flex". Requests for "flex" service must be made at least one (1) day prior to the desired trip time, and may be made up to four (4) days in advance.
<b>Dial-a-Ride</b>	1	Individual origin-to-destination or "curb-to-curb" service, reserved at least one (1) hour in advance.	<b>210 Pojoaque/Nambe Dial-a-Ride:</b> provides service within the Pueblos of Pojoaque and Nambe	8:00 a.m. to 4:00 p.m. Monday through Friday	Free	Requests for service must be made at least one (1) <b>hour</b> prior to the desired trip time, and may be made up to four (4) days in advance.

<b>Demand</b>	2	Individual origin-to-destination or "curb-to-curb" service, reserved at least one (1) day in advance.	<b>Espanola Demand:</b> provides service within a 15-mile radius of the Espanola Transit Center; <b>370 Chili Ride:</b> provides service within 3/4 of a mile of route 340 Chile Line Red in Taos	6:00 a.m. to 6:00 p.m. Monday through Friday	\$1.00	Requests for service must be made at least one (1) day prior to the desired trip time, and may be made up to four (4) days in advance.
<b>ADA Complementary Paratransit</b> All fare services (Fixed Flex, Demand, premium) are free for ADA-paratransit-eligible passengers. ADA-paratransit-eligible passenger are also entitled to reasonable accommodations (such as assistance boarding/alighting).						

(f) Advertising/marketing

Advertising and marketing is conducted by NCRTD's Public Information Department.

### 3. Administrative Employees

(a) Title and job description

See next pages.



# *North Central Regional Transit District*

## **Job Description**

<b>Title:</b>	Executive Director	<b>Code:</b>	<b>100</b>
<b>Division:</b>	Executive	<b>Effective Date:</b>	04/19
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/19
<b>FLSA Status: Exempt</b>			

### GENERAL PURPOSE

As Chief Executive Officer, provides overall leadership and direction. Performs a variety of professional **executive and managerial** duties related to planning, organizing, directing, coordinating, and controlling the development, expansion, maintenance and operation of the North Central Regional Transit District. Establishes annual goals and objectives, short-range and long-range plans, and policies and procedures to ensure the policy direction of the NCRTD Board of Directors is carried out in an expeditious and cost-effective manner.

### SUPERVISION RECEIVED

Works under the broad policy guidance and direction of the Board of Directors and is the sole employee of the Board of Directors.

### SUPERVISION EXERCISED

As the Executive Director, provides leadership and direction to the Senior Management Team and serves as the top-level executive responsible and accountable for interpreting and carrying out the Board's directives. Provides general supervision to district managers and supervisors. Provides close to general supervision to immediate administrative professional, technical, and clerical staff.

### ESSENTIAL FUNCTIONS

Exercises all authority, powers, or duties as prescribed by the NCRTD Board of Directors and as prescribed by statutes and adopted Bylaw's; serves as administrative advisor and liaison to the Board of Directors and member entities as needed to inform and apprise on operational issues; provides technical insight and recommendations related to determining operational policies, goals and objectives; formulates implementation options and strategies, converts strategies to action plans with timetables and deadlines; evaluates district needs and formulates short and long range plans to meet needs in all areas of responsibility.

Participates in state, regional, and metropolitan transit and transportation planning processes; represents and supports the position of the Board majority while maintaining a professional and respectful relationship between the NCRTD staff and the Member governments in the NCRTD.,

Assists the Board in developing and maintaining positive relationships with the office of the Governor, the NMDOT, the New Mexico State Legislature, the New Mexico Congressional Delegation, and other key governmental agencies.

Plans, directs, coordinates and controls the activities of the district; determines work priorities and delegates assignments to subordinate personnel; develops guidelines and deadlines, supervises staff; provides quality assurance review of work in progress; assures that services delivered by departmental staff meet quality and timeliness standards; monitors and reports department activities through defined management assessment programs, metric measurement systems and related performance management methods.

Manages, directs and coordinates the development and implementation of the long range operating business plan of the District; ensures the financial accountability and appropriate record keeping and internal controls of the District; directs the preparation and development of District and departmental budgets and monitors fiscal controls to assure conformity with established financial constraints governed by capital funding program; monitors financial status through financial reporting system.

Identifies and secures long range funding with the assistance of the NCRTD Board of Directors; oversees and manages federal grant programs; assures compliance with granting authority regulations.

Manages transportation system improvement and development; manages property maintenance and purchasing, reviews and approves work orders.

Manages and performs the hiring and evaluating staff, overseeing the implementation of the service plan, conducts regular performance evaluations; makes decisions impacting employee status in the organization, including retention, advancement, discipline and termination.

Performs other related duties as required.

#### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from college with a master's degree in business administration, public administration, or a related field;

AND

B. Ten (10) years of experience in a field directly related to above duties, four (4) years of which must have been in an executive level management capacity;

OR

C. An equivalent combination of education and experience.

2. Knowledge, Skills, and Abilities:

**Extensive knowledge** of the political, sociological and economic complexities related to multi-jurisdictional cooperation and general operations; financial management practices; principles of human resources, collective bargaining, management and employee supervision; public or platform speaking, proposal development, creative writing and presentation skills; negotiation techniques; strong interpersonal group motivation and communication skills.

**Extensive skill** in the art of diplomacy and cooperative problem solving.

**Ability to** plan, coordinate, direct and supervise personnel; interpret laws, ordinances and regulations common to transit operations; manage operating records and prepare reports; to conduct necessary research and compile comprehensive reports; effectively utilize personal computer, including word processing, spreadsheet; establish and maintain effective and cooperative working relationships with District Employees, member entities and the general public; provide effective customer service; plan, organize and implement special events; coordinate activities with other groups and agencies; work independently and deal effectively with stress caused by work load and time deadlines.

3. Special Qualifications:

Must possess a valid State of New Mexico driver's license with a satisfactory driving record. Must be able to work with no advance notice additional hours, evenings, on-call, holidays and weekends and be able to travel.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Frequent travel required in normal course of job performance.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.

- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director: \_\_\_\_\_ Date \_\_\_\_\_



# North Central Regional Transit District Job Description

<b>Title:</b>	Attorney	<b>Code:</b>	110
<b>Division:</b>	Executive	<b>Effective Date:</b>	04/19
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/19
<b>FLSA Status: Exempt</b>			

GENERAL PURPOSE

Performs **professional legal duties** as needed to ensure compliance with federal and state laws and to assist in all legal matters including providing legal advice and preparing and reviewing legal documents. This is an "At-Will" classification which means the Attorney serves at the will of the Executive Director and may be removed at any time without cause, notice, or right of appeal.

SUPERVISION RECEIVED

Works under the executive direction of the Executive Director and the broad policy guidance and direction of the Board of Directors.

SUPERVISION EXERCISED

May provide functional supervision to staff on a project-by-project basis.

ESSENTIAL FUNCTIONS

Advises the Board of Directors on legal compliance, litigation, personnel and all other matters having legal implications for the District; converts the vision and interests of the board to resolutions and policies balancing administrative control and providing proper policy guidance.

Advises the Executive Director on legal compliance, litigation, personnel and all other matters having legal implications for the District; responds to internal and external requests for advice regarding District contracts and transactions; engages in professional discussion with internal and external customers to develop trust, maximize relationships, and to enter into transactions and contracts.

Advises the senior staff on legal compliance, litigation, personnel and all other matters having legal implications for the District.

Monitors the legal "landscape" keeping current on changes in laws impacting the District including but not limited to employment law, state tax laws, labor management laws and state and federal regulations of District finances and transactions.

Performs periodic review of the bar bulletin, transit publications and monitors local news stories to ensure attention to current changes in the law and politics of the region; performs research to assess specific tasks required for District operation and compliance.

Perform legal analysis and training to keep the administrative staff apprised of changes and development of the law in fields pertinent to their work; performs ongoing study of impact areas specific to district management and operations.

Manages the recruitment and selection of outside counsel as needed to address uniquely specific aspects of law and practice related to the district; negotiates fee agreements to mitigate expenses to the district.

Draft and prepare legal memoranda, demand letters, pleadings, resolutions and various other legal instruments necessary for the district to perform its business.

Review and revise staff memos, personnel actions and correspondences to ensure compliance with state and federal law and minimize legal exposure to liability.

Attend meetings of the Board of Directors and of various other local governmental bodies to provide information and advice on intergovernmental affairs.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:

- A. Graduation from college with a juris doctorate degree;
- AND
- B. Ten (10) years of experience in a field directly related to above duties, five (5) years of which must have been in municipal government;
- OR
- C. An equivalent combination of education and experience.

2. Knowledge, Skills, and Abilities:

**Extensive knowledge** of laws regarding government and governmental procedures under New Mexico law; areas of law likely to impact the district, including tax codes, ethical requirements and election laws; awareness and sensitivity to political concerns of individual Board members; the application of ethical and professional judgment in determining the legal requirements for the Board and Staff regardless of individual desires; state local government law such as Inspection of Public Records, Open Meetings Act, Governmental Conduct Act, finance, real property, contracts, purchasing, personnel, civil rights, and land use; in federal laws regarding federal grants, federal grant compliance, procurements and federal contracting; requirements for state and federal procurement.

**Extensive skill** in the art of diplomacy and cooperative problem solving; the effective balancing of staff administrative autonomy versus proper Board oversight on policy matters; effective writing and communications essential to ensuring that the Executive Director understands and trusts legal counsel and is open to advice that will avoid liability for the organization.

**Ability to** clearly explain complex legal notions in simpler terms; ensure that the Board of Directors has sufficient information to make critical decisions; generate and maintain the necessary trust between the Board and staff; provide rapid feedback on legal issues without having to extensively research issues; effectively communicate with staff; encourage and inspire trust; work collaboratively with other staff members to balance legal requirements against the practical concerns of the staff; identify policies applicable to specific incidents to ensure staff voluntary compliance.

3. Special Qualifications:

Must be licensed to practice law in the State of New Mexico.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Frequent travel required in normal course of job performance.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).

- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director: Anthony J. Marlow Date 6/14/2019

# North Central Regional Transit District Job Description



<b>Title:</b> Human Resources Director	<b>Code:</b> 120
<b>Division:</b> Executive	<b>Effective Date:</b> 04/13
<b>Department:</b> Administration	<b>Last Revised:</b> 04/19
<b>FLSA Status: Exempt</b>	

## GENERAL PURPOSE

Performs a variety of **professional and technical administrative** duties related to planning, organizing, directing, coordinating and implementing a district human resources (HR), occupational health and safety and risk mitigation programs. This is an "At-Will" classification which means the Human Resources Director serves at the will of the Executive Director and may be removed at any time without cause, notice, or right of appeal.

## SUPERVISION RECEIVED

Works under the policy guidance and direction of the Executive Director.

## SUPERVISION EXERCISED

Provides functional supervision to district staff, supervisors and managers engaged in the day-to-day compliance with HR policies.

## ESSENTIAL FUNCTIONS

**Human Resources:** Manages all aspects of the district Human Resource Management functions; develops and implements personnel policies; recommends and implements guidelines and practices; oversees personnel file management; assures completeness and confidentiality of HR records; monitors and assures district-wide compliance with federal and state statutes; solicits legal opinions in matters of liability; investigates alleged violations of law and HR regulations. Serves as the District's Equal Employment Opportunity (EEO) Officer.

Manages district recruitment and selection processes; conducts formal recruitments for vacant and created positions; determines testing procedures and successive hurdles; monitors and verifies appointments are made in accordance with established policies and procedures; may direct the administration of selection tests to applicants.

Develops and implements new staff orientation program; oversees, develops and implements ongoing mandatory staff training for all staff, i.e., code of conduct, sexual harassment, accident reporting, drugs in the workplace, conflict of interest, etc.; provides training and staff support to supervisors.

Assists department heads and supervisors in the development and implementation of communication, recognition, training and incentive programs; assists employees to resolve work related problems; develops working relationships with community professionals as needed to secure special employee assistance.

Oversees general employee relations processes; monitors application of policies to assure fair and consistent treatment of employees, i.e., recruitment, selection, compensation, advancement, etc.; resolves complex issues related to compensation, discipline and discharge; administers district grievance process; administers proactive employee relations program, promotes harmony among workers and resolves grievances; coordinates the appeals and grievance hearing.

Plans and directs implementation and administration of benefits programs designed to insure employees against loss of income due to illness, injury, layoff, or retirement; directs preparation and distribution of written and verbal information to inform employees of benefits programs such as insurance plans, pension plans, paid time off, and special employer sponsored activities; analyzes existing benefits policies; acts as benefit plan administrator; reviews and researches changes in IRS rules and regulations affecting district benefit operations and programs.

Oversees agency compensation programs and system; conducts internal and external studies to assure pay equity and market competitiveness; directs overall performance evaluation program through department heads and supervisors; administers and interprets district merit system; develops and implements personnel management rules as required by law; monitors leave practices, overtime practices, etc.; monitors employee pay progression based upon established policy and practice.

Approves personnel actions and manages record keeping functions related to insurance coverage, pension plan, and human resource transactions such as hires, promotions, transfers, performance reviews, and terminations; directs or performs the preparation of employee separation notices and related documentation, and conducts exit interviews to determine reasons behind separations; prepares reports and recommends procedures to reduce absenteeism and turnover.

Manages district efforts to maintain a drug-free workplace; promotes drug free lifestyles to assure employee, co-worker and general public safety; conducts employment pre-offer and post-offer drug screenings; coordinates and conducts random drug testing of workforce to assure compliance with ordinance and various state and federal regulations.

**Workers Compensation:** Establishes and maintains working relationships with state workers compensation fund administrators and self-insurance provider; ensures timely submission on-the-job accidents and incidents; may conduct initial investigation into reported accidents; coordinates with insurance carriers for "coordination of benefits" as appropriate.

**Risk & Safety:** Participates as a member of an executive committee; contributes to the collective assessment and development of planning, coordination and problem solving; assists in the formulation of strategies for the implementation and accomplishment of goals and objectives; designs a safety program consistent with OSHA requirements that sets up processes to mitigate accidents and work-related injuries; conducts regular safety audits of district facilities and operations.

Assists with the processing of worker's compensation claims; may monitor number, type and cost of claims; may perform employee follow-up to schedule timely return of worker to the job; assists to prepare reports and submits to Workers Compensation insurance carrier as required.

**Insurance & Liability:** Establishes ongoing working relationships with insurance providers including, property liability, vehicle liability, errors and omissions and general liability coverage; monitors insurance provider handling of various claims; assists in the tracking and documentation of claim information; may offer testimony in court cases as needed.

Performs related duties as assigned.

#### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from college with a bachelor's degree in human resource management, public administration or a related field;

AND

B. Four (4) years of progressively responsible work experience creating, implementing, or delivering training and organizational development programs, human resources, risk administration, safety management or related field;

2. **Considerable knowledge of** human resource management theory, methods, and practices; the legal environment related to human resource management, i.e., FLSA, FLMA, ADA, EEO, COBRA, etc.; benefit, retirement, and compensation laws and guidelines; employee classification, compensation and benefits, recruitment, selection, training, and labor relations; departmental operations including applicable laws and regulations; principles of supervision, including evaluation and motivation; federal and state laws as they apply to human resource management practices; benefit programs, state and federal, i.e., FSA's, HAS's, pension options, etc.; benefit costing procedures; training methods; basic computer operation. **Working knowledge of** budget development and fiscal accounting principles, practices and procedures; risk management and safety practices.

**Considerable skill** in the art of diplomacy and cooperative problem solving; leadership and organizational behavior management; establishing and maintaining effective working relationships with State, Federal, and other local officials, elected officials, and subordinate staff. Skill in the operation of PC Computer, related software, calculator, fax machine, copy machine, telephone.

**Ability to** communicate effectively, verbally and in writing; prepare and analyze comprehensive reports; maintain quality work production while dealing with deadline pressures imposed from within and without the division; make basic decisions where established procedures do not always apply; perform complex mathematical computations; operate personal computer and apply various program applications related to word processing, spread sheets and desktop publishing; develop effective working relationships with supervisor, fellow employees, and the public.

3. Special Qualifications:

Professional certification as PHR or SPHR is required.

4. Work Environment:

Incumbent of the position performs in a typical office setting with appropriate climate controls. Tasks require variety of physical activities, not generally involving muscular strain, such as walking, standing, stooping, sitting, reaching, talking, hearing and seeing. Common eye, hand, finger dexterity required to perform essential job functions but may be accommodated. Mental application utilizes memory for details, verbal instructions, emotional stability, discriminating thinking and creative problem solving.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director: Anthony J. Montello Date 6/14/2019

# North Central Regional Transit District Job Description



<b>Title:</b>	Human Resources Specialist	<b>Code:</b>	125
<b>Division:</b>	Executive	<b>Effective Date:</b>	04/19
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs **administrative support and complex clerical duties** as needed to expedite the day-to-day human resources operations and functions related to recruitment, selection, employee assistance, compensation and HR system maintenance.

SUPERVISION RECEIVED

Works under the general supervision of the Human Resource Director.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

**Human Resources:** Assists with all aspects of the district Human Resource Management functions; monitors compliance with personnel policies; performs day-to-day personnel file management; assures completeness and confidentiality of HR records.

Assists to coordinate district recruitment and selection processes; initiates formal recruitments for vacant and created positions; performs pre-employment testing.

Conducts new staff orientations; oversees, assists with ongoing mandatory staff training, i.e., code of conduct, sexual harassment, accident reporting, drugs in the workplace, conflict of interest, etc.; provides assistance to supervisors.

Assists employees to resolve work related problems; may be required to develop working relationships with community professionals as needed to secure special employee assistance.

May participate in the administration of district grievance process; promotes harmony among workers and resolves grievances; participates in appeals and grievance hearings.

Assists with benefit administration; distributes written and verbal information to inform employees of benefits programs such as insurance plans, pension plans, paid time off and special employer sponsored activities; researches changes in IRS rules and regulations affecting district benefit operations and programs.

Assists to conduct internal and external studies to assure pay equity and market competitiveness; monitors leave practices, overtime practices, etc.; monitors employee pay progression based upon established policy and practice.

Assists with the preparation of employee separation notices and related documentation, and may conduct exit interviews to determine reasons behind separations.

Participates in district efforts to maintain a drug-free workplace; promotes drug free lifestyles to assure employee, co-worker and general public safety; coordinates and assists with employment pre-offer and post-offer drug screenings; assists to monitor random drug testing of workforce to assure compliance with ordinance and various state and federal regulations.

**Workers Compensation:** Assists with the timely submission of on-the-job accidents and incident reports; may conduct initial investigation into reported accidents.

Assists with the processing of worker's compensation claims; may monitor number, type and cost of claims; may perform employee follow-up to schedule timely return of worker to the job; assists to prepare reports and submits to Workers Compensation insurance carrier as required.

Performs related duties as assigned.

MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from college with a bachelor's degree in human resource management, public administration or a related field;

AND

B. Sufficient experience to demonstrate an aptitude and ability to perform above and related duties;

OR

B. Equivalent combination of education and experience;

2. **Some knowledge of** human resource management theory, methods, and practices; the legal environment related to human resource management, i.e., FLSA, FLMA, ADA, EEO, COBRA, etc.; benefit, retirement, and compensation laws and guidelines; employee classification, compensation and benefits, recruitment, selection, training, and labor relations; departmental operations including applicable laws and regulations; federal and state laws as they apply to human resource management practices; benefit programs, state and federal, i.e., FSA's, HSA's, pension options, etc.; basic computer operation.

**Some skill** in the art of diplomacy and cooperative problem solving; skill in the operation of PC Computer, related software, calculator, fax machine, copy machine, telephone.

**Ability to** communicate effectively, verbally and in writing; prepare and analyze comprehensive reports; maintain quality work production while dealing with deadline pressures imposed from within and without the division; perform complex mathematical computations; operate personal computer and apply various program applications related to word processing, spread sheets and desktop publishing; develop effective working relationships with supervisor, fellow employees, and the public.

3. Special Qualifications:

None.

4. Work Environment:

Incumbent of the position performs in a typical office setting with appropriate climate controls. Tasks require variety of physical activities, not generally involving muscular strain, such as walking, standing, stooping, sitting, reaching, talking, hearing and seeing. Common eye, hand, finger dexterity required to perform essential job functions but may be accommodated. Mental application utilizes memory for details, verbal instructions, emotional stability, discriminating thinking and creative problem solving.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.

- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director: Anthony J. McAllister Date 06/14/2019



# North Central Regional Transit District Job Description

<b>Title:</b>	Executive Assistant	<b>Code:</b>	135
<b>Division:</b>	Executive	<b>Effective Date:</b>	04/13
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs a variety of **complex administrative support** duties designed to expedite executive, administrative and general business functions of the office of the Executive Director, including Board of Directors support, correspondence, executive scheduling, travel, special projects and non-technical Human Resources coordination. This is an "At-Will" classification which means the Executive Assistant serves at the will of the Executive Director and may be removed at any time without cause, notice, or right of appeal.

SUPERVISION RECEIVED

Works under general supervision of the NCRTD Executive Director.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Performs critical, highly responsible, sensitive, and confidential administrative and office support functions for the Executive Director; assumes responsibility for overall administrative functions of the Executive Office and clerical support of assigned aspects of the human resource function.

Develops Executive Directors monthly report to the Board of Directors for Board Packet, prepares information for Board meetings and coordinates as necessary; coordinates the review and receipt of items going before the Board; ensures timely advertising and posting of official meetings schedules, coordinates with Public Information Officer as needed; attends various board, sub-committee and task force meetings and takes official minutes.

Screens calls and visitors; and responds to highly critical inquiries by telephone, regular mail, and email; exercises discretion and judgment when responding to correspondence requests and questions on behalf of the Executive Director; follows established protocol and precedent to resolve issues, questions and problems at the most appropriate levels of the organization.

Assists to monitor overall compliance with NCRTD regulations, federal regulations, state laws, etc., related to medical leave, ADA, FLSA, FMLA, ADEA and related public policy impacting the employee/employer relationship.

Performs and maintains clerical functions in support of the human resources functions related to personnel policy maintenance and distribution, human resources documentation and personnel files, adherence to policies and procedures, employee benefits, and employee orientation; distributes performance management and appraisal instruments for annual reviews; creates official employee records performing data input for the HRIS; performs leave accounting; maintains files and documentation regarding executive staff, including timekeeping reports, evaluations, and disciplinary actions; conducts benefits/insurance open enrollment events; prepares proper documentation for termination, leave payout, continuation of benefits, etc.

Prepares meeting agenda(s); attends various Board, Executive and staff meetings and takes meeting minutes and notes; prepares transcriptions and other records; organizes, and maintains a wide variety of electronic and paper files and other critical documents; verifies accuracy of meeting records and creates official files for storage and preservation; follows established archiving and records management procedures for the ongoing maintenance of NCRTD documents and records.

Monitors deadlines given to department and division heads for reports and requests; completes critical and time-sensitive documents; provides confidential assistance to the communication efforts of the Executive Director's office; researches, analyzes, and presents data for reports and other documents as maybe requested;

Maintains Executive Director's schedules and calendars; and coordinates travel arrangements, meetings, and conferences; composes and coordinates the preparation of reports, policies, procedures, and operating manuals; as well as letters and other correspondence; proofreads for accuracy, correct form, content and proper English usage; in coordination with the Public Information Officer, may create and post public advertisements or announcements as assigned by the Executive Director.

Receives, verifies and processes various accounts payable billings and invoices; ensures proper and timely submission to enable vendor payments.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from college with a bachelor's degree in general administration, administrative sciences, or business administration;

AND

B. Five (5) years of increasingly responsible administrative support and office clerical experience, that involved frequent public contact; including at least two (2) years as the primary support to an Executive, department head or human resources office;

OR

C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Considerable knowledge of** proper business English usage including spelling, grammar, and syntax; modern office practices and procedures; secretarial procedures and methods related to filing and documenting; English composition, spelling, grammar, punctuation, etc.; business writing; report and presentation writing; personal computers and current office software programs for word processing, spreadsheet, presentation, and databases at the advanced level of proficiency; interpersonal communication skills and telephone etiquette; standard office equipment operation. **Some knowledge of** pertinent District functions, policies, rules and regulations.

**Considerable skill in** computer software programs including MS Word, Excel, Outlook, and PowerPoint.

**Ability to** conduct self in an appropriate manner as a representative of the NCRTD working effectively in a diverse work environment; quickly learn District operations, programs, policies, procedures, and the functions of the assigned office. Perform assigned administrative support functions with speed and accuracy under time pressure; operate a computer including word processing, spread sheet and data base applications; perform basic mathematical calculations; understand and explain District and department policies and procedures; maintain records and files; research and compile data and information, and apply analytical skills; develop and monitor divisional budgets and establish budgetary controls; prepare concise and effective written communications; manage multiple projects and operations simultaneously; work independently under time deadlines; build and maintain effective working relationships with those contacted in the course of work using principles of good customer service; communicate effectively both orally and writing in an office environment; maintain confidentiality.

3. Special Qualifications:

Must be a notary public. Must be available to work outside regular business hours, as required by the demands of the job. (Must possess a valid Driver's License with a satisfactory driving record.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director:



Date

06/14/2019

# *North Central Regional Transit District*

## Job Description



<b>Title:</b> Marketing & Promotions Coordinator	<b>Code:</b> 145
<b>Division :</b> Public Information	<b>Effective Date :</b> 07/20
<b>Department:</b> Administration	<b>Last Revised:</b> 05/20
<b>FLSA Status: Exempt</b>	

### GENERAL PURPOSE

Performs branding and marketing activities related to the promotion of the District, assists in the development and expansion of transit promotional programs, coordinates ridership and community outreach projects, contributes to website updates and provides support to social media platforms. Performs activities related to creating marketing, customer and public information materials, conducts ridership and other promotions; branding; supporting community partnerships and assisting with organizational participation in community events.

### SUPERVISION RECEIVED

Works under the general supervision of the Public Information Officer.

### SUPERVISION EXERCISED

None.

### ESSENTIAL FUNCTIONS

Performs professional level marketing and promotional activities to include serving as a program liaison, coordinating public processes, and providing recommendations for program direction. As a Coordinator, coordinates services between the District and the public.

Assists in the development of all strategic and tactical marketing initiatives and plans.

Conducts market research to identify effective promotional methods.

Implements activities in support of District’s Strategic Marketing and Advertising Plan. Assists in the research for marketing and promotional activities, monitors expenditures within authorization.

Implements specific strategies to raise awareness and use of transit by key target audiences, including commuters, youth, seniors and the general public. Prepares, coordinates and implements specific promotions and campaigns to raise awareness and use of transit and other District services. Supports public involvement activities.

Works with the department specialist to ensure website is up to date and effective at reaching riders and potential riders as well as stakeholders.

Works with department specialist to support social media platforms and new media for District supporting rider, public, and business communications and constituent relations.

Coordinates promotional community-based activities including marketing campaigns, site-based promotions, special events, sponsorships and cross-promotions. Coordinates with local jurisdictions, partner agencies, press and advertising contacts, consultants, community vendors. Represents District in community events.

Assists with publications and public communications. Coordinates photo and video shoots.

Requires interface with other public, private and non-profit sectors.

Produces on-vehicle information, on-street rider materials, and other customer communications as needed. Monitors and ensures accurate information/materials on vehicles and on-street. Supervises transit advertising program.

Researches and coordinates advertising media placement. Recommends ad buys. Drafts print and radio spots and coordinates with the production of television, video and outdoor advertising.

Assists in special projects for the District. Serves as back-up media spokesperson, responding to media inquiries and representing District information as required.

Performs other related duties as required.

### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Bachelor's Degree in Business Administration, Marketing, Communications, or a related field

AND

B. Five (5) years of verifiable professional experience in marketing and communications

OR

C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Working knowledge of** Marketing and branding principles and practices; Public relations principles; Communications principles; Advertising Principles, Web publishing methods; Graphic design; Social media methods; Project management principles. Strong understanding of new technologies and how they can be applied to marketing.

**Considerable skill** in Implementing marketing and branding plans; Preparing and distributing promotional materials; Managing projects; Preparing press releases, news articles, and other marketing and public information copy; Preparing business correspondence; Initiating and maintaining community and industry contacts; demonstrate proficiency in the use of various software applications, i.e., MS Word, Excel, Outlook, PowerPoint, Adobe Creative Cloud; Communication, interpersonal skills as applied to interaction with coworkers, supervisor, and the general public. Creative and innovative. Team player and problem solver.

**Ability to** draft reports, documents and agreements; analyze a variety of program issues and problems and make recommendations; Develop creative ideas in relation to public information projects; develop and implement marketing plans; organize and coordinate advertising programs; promote existing, new and special transit services; design and develop a variety of promotional, information and educational materials; maintain expenditures within budget constraints; negotiate and coordinate contract services; prepare, edit and proofread written materials; make public presentations and communicate effectively both orally and writing; establish and maintain effective and cooperative working relationships with District Employees, member entities and the general public; provide effective customer service; plan, organize and implement special events; coordinate activities with other groups and agencies; work independently and deal effectively with stress caused by work load and time deadlines.

3. Special Qualifications:

Must possess a valid State of New Mexico driver's license with a satisfactory driving record. Must be able to work with no advance notice additional hours, evenings, on-call, holidays and weekends and be able to travel.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Frequent travel required in normal course of job performance.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions

are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director: \_\_\_\_\_ Date \_\_\_\_\_

# North Central Regional Transit District Job Description



<b>Title:</b>	Public Information Officer	<b>Code:</b>	150
<b>Division:</b>	Public Information	<b>Effective Date:</b>	04/13
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/19
<b>FLSA Status: Exempt</b>			

**GENERAL PURPOSE**

Provides a variety of **complex professional, technical and administrative duties** related to promoting media relations, employee communications, and community relations to enhance public awareness of NCRTD operations, services and programs. Plans, organizes and coordinates a variety of marketing activities which involves the development and design of promotional and informational and educational materials. Acts as the NCRTD spokesperson.

**SUPERVISION RECEIVED**

Works under general supervision of the NCRTD Executive Director.

**SUPERVISION EXERCISED**

May provide functional supervision to assigned administrative support staff on a project-by-project basis.

**ESSENTIAL FUNCTIONS**

Provides professional support to the Executive Director by developing methods and materials to promote District activities and events; assist District departments with communication needs and projects; assists in the preparation of budget recommendations; manages marketing and related budget allocations and ensures compliance with established fiscal guidelines.

Responsible for focusing on the strategic positioning of the District's image and brand; performs a variety of marketing, communication and production activities for the North Central Regional Transit District; provides leadership in developing, directing and coordinating efforts to increase the public and community support for public transportation.

Plans, develops, organizes and coordinates district wide community outreach and information programs; develops marketing campaigns and advertising; determines appropriate use of promotional/educational materials; handles multiple facets of public and media relations and marketing using print, broadcast, digital and internet/email applications to achieve optimum results and cost control; oversees and utilizes various social media platforms to expand and enhance district visibility; writes and produces press releases, public service announcements, white papers, newsletters, brochures, annual report and other educational / promotional materials; oversees speech writing activities and the development of presentations.

Coordinates and plans cooperative production, programming or special events efforts; provide ongoing marketing and advertising to the member agencies and district customers; assists in the strategy, organization, coordination and implementation of inter-agency activities and programs; initiates public outreach; develops and conducts opinion surveys for internal and external customer and constituent perceptions to improve the effectiveness of the District's customer and visitor interface as well as collect information for District initiated programs and policies.

Represents the Executive Director and District in a variety of capacities as assigned and serve as a member of various teams and committees; may serve as a member of an executive management team; serves as liaison with media and press, community and advocacy groups and elected officials and their staffs as directed by Executive Director; Technical representative to related local, regional, and statewide planning agencies and marketing groups; performs outreach to key and diverse constituencies to support public transit.

Responsible for promoting the District at such venues as trade shows, expositions, community events, job fairs, etc.; attends meetings; write guest columns and letters to newspaper editors.

Work with the Executive Director in responding to requests from constituents, customers, media and elected officials and their staffs; processes and follows up on inquiries, complaints and comments from the public that are not easily solved/resolved by contact with a single person/entity; pursues resolution within the established guidelines of the District; may make recommendations effecting change in programs, policy and established practice, i.e., "Crisis Communication Plan" and "Media Relations Guidelines".

Serves as Web Master; manages the content, layout and functionality of the District web site; maintains working relationship with 3<sup>rd</sup>-party server host; develops internal and external District communications, including newsletters, brochures, website, advertising and press releases; plans and develops District's use of technology to improve communications to the public; works with departments to promote District programs; develops and creates social media presentations for public education projects, including Facebook, twitter, Instagram, YouTube, etc.

Operates personal computer and various software applications, i.e.; Microsoft Office (Excel, Word, Access, Power Point) Adobe Illustrator, PhotoShop, PageMaker, Scheduler Plus or other scheduling software, etc., as needed to establish databases, communication documents, illustrations and publications;

Performs other related duties as required.

#### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from an accredited college or university with a Bachelor's degree in Marketing, Communication's, Journalism, Public Relations or a closely related field;

AND

B. Five (5) years of verifiable professional public information, marketing, advertising, public education and outreach and event planning experience with the utilization of a wide variety of media;

OR

C. An equivalent combination of education and experience

2. Knowledge, Skills and Abilities:

**Considerable Knowledge of** contemporary marketing and public information principles, practices and techniques; media industries in the District service area; advertising, marketing and public relations practices and techniques; advertising strategies and campaigns; social media platforms, including, Facebook, Twitter, Instagram, UTube, etc.; principles of design and layout techniques; public or platform speaking, proposal development, creative writing and presentation skills; organizational politics; negotiation techniques; strong interpersonal group motivation and communication skills; principles of salesmanship; desktop publishing. **Working knowledge of** photography and typography; principles and practices of public information records management.

**Considerable skill** in the art of diplomacy and cooperative problem solving. **Skill in** using personal computers and applicable software applications including spreadsheets, publishing and data base programs; operating audio visual equipment; public speaking; developing, coordinating and delivering public information materials for District programs and activities; responding to requests and inquiries from media and the general public; math skills; English and grammar skills; methods and techniques of researching and interpreting data and information.

**Ability to** draft reports, documents and agreements; analyze a variety of program issues and problems and make recommendations; Develop creative ideas in relation to public information projects; develop and implement marketing plans; organize and coordinate advertising programs; promote existing, new and special transit services; design and develop a variety of promotional, information and educational materials; demonstrate proficiency in the use of various software applications, i.e., MS Word, Excel, Outlook, PowerPoint, Adobe, Publisher and/or other design software; maintain expenditures within budget constraints; negotiate and coordinate contract services; prepare, edit and proofread written materials; make public presentations and communicate effectively both orally and writing; establish and maintain effective and cooperative working relationships with District Employees, member entities and the general public; provide effective customer service; plan, organize and implement special events; coordinate activities with other groups and agencies; work independently and deal effectively with stress caused by work load and time deadlines.

3. Special Qualifications:

Must possess a valid State of New Mexico driver's license with a satisfactory driving record. Must be able to work with no advance notice additional hours, evenings, on-call, holidays and weekends and be able to travel.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Frequent travel required in normal course of job performance.

5. Professional Standards:

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In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director: Anthony J. Mastella Date 6/19/19

# North Central Regional Transit District Job Description



<b>Title:</b>	Marketing & Communications Specialist	<b>Code:</b>	155
<b>Division:</b>	Public Information	<b>Effective Date:</b>	04/13
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/19
<b>FLSA Status: Exempt</b>			

GENERAL PURPOSE

Provides a variety of **professional, technical and administrative duties** related to assisting in the implementation of the advertising, marketing, outreach and promotional activities to enhance public awareness of NCRTD operations, services and programs. Plans, organizes and coordinates a variety of marketing activities which involves the development and creative design of promotional and informational and educational materials and special events and outreach activities, social media, website management, and representing the District at external events and activities.

SUPERVISION RECEIVED

Works under the general supervision of the Public Information Officer.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Responsible for focusing on the strategic positioning of the District's image and brand; performs a variety of marketing, communication and production activities for the North Central Regional Transit District; provides leadership in developing, directing and coordinating efforts to increase the public and community support for public transportation.

Plans, develops, organizes and coordinates district wide community outreach and information programs; develops marketing campaigns and advertising; determines appropriate use of promotional/educational materials; handles multiple facets media relations and marketing using print, broadcast, digital and internet/email applications to achieve optimum results and cost control; writes and produces press releases, public service announcements, white papers, newsletters, brochures, annual report and other educational / promotional materials. Must be detail oriented.

Coordinates and plans cooperative production, programming or special events efforts; provide ongoing marketing and advertising to the member agencies and district customers; assists in the strategy, organization, coordination and implementation of inter-agency activities and programs; initiates public outreach.

Coordinates marketing and promotional campaigns by identifying goals and objectives, coordinating graphics, discussing options with various departments, distributing materials, and analyzing results.

Implements plans to inform the public of bus service changes, to increase ridership and to build general public awareness and support.

Develops and maintains databases and other systems for collecting and updating information on community contacts for the inventory and distribution of publications and other materials; and other purposes.

Participates in and coordinates staff involvement in community events, receptions, fairs and parades.

Ensures the ongoing availability of service information through publication displays, on-board publications, and community-based print and electronic media.

Develop, implement, and monitor social media strategies that encourages ridership and dissemination of information, including producing short videos for You Tube channel.

Performs activities related to the District's commercial advertising, in vehicle advertising, and other transit related advertising sales.

Contributes to the maintenance, updating and enhancement of the District's website.

Process departmental invoices into an excel spreadsheet. Submit them to Public Information Officer for approval and generate payment vouchers. Follow that by scanning signed documents, labeling them and filing copies, and finally digitally deliver them via the finance server, to finance department.

May participate as a technical representative to related local, regional, and statewide planning agencies and marketing groups as assigned; performs outreach to key and diverse constituencies to support public transit.

Responsible for promoting the District at such venues as trade shows, expositions, community events, job fairs, etc.; attends meetings. As a result, must be available to provide occasional coverage during the evening and on weekends.

Operates personal computer and various software applications, i.e.: Adobe Creative Suite, Microsoft Office (Excel, Word, Access, Power Point) PageMaker, Scheduler Plus or other scheduling software, etc., as needed to establish databases, communication documents, illustrations and publications;

Performs other related duties as required.

#### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from an accredited college or university with a Bachelor's degree in Marketing, Communication's, Journalism, Public Relations or a closely related field;

AND

B. Two (2) years of verifiable professional public information, marketing, advertising, public education and outreach and event planning experience with the utilization of a wide variety of media;

OR

C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Working knowledge of** contemporary marketing and public information principles, practices and techniques; media industries in the District service area; advertising, marketing and public relations practices and techniques; advertising strategies and campaigns; principles of design and layout techniques; public or platform speaking, proposal development, creative writing and presentation skills; organizational politics; negotiation techniques; strong interpersonal group motivation and communication skills; principles of salesmanship; desktop publishing; photography and typography; principles and practices of public information records management.

**Considerable skill** in the art of diplomacy and cooperative problem solving, creative design and use of Adobe Creative Cloud. **Skill in** using personal computers and applicable software applications including spreadsheets, publishing and data base programs; operating audio visual equipment; public speaking; developing, coordinating and delivering public information materials for District programs and activities; responding to requests and inquiries from media and the general public; math skills; English and grammar skills; methods and techniques of researching and interpreting data and information.

**Ability to** draft reports, documents and agreements; analyze a variety of program issues and problems and make recommendations; Develop creative ideas in relation to public information projects; develop and implement marketing plans; organize and coordinate advertising programs; promote existing, new and special transit services; design and develop a variety of promotional, information and educational materials; demonstrate proficiency in the use of various software applications, i.e., MS Word, Excel, Outlook, PowerPoint, Adobe, Publisher and/or other design software; maintain expenditures within budget constraints; negotiate and coordinate contract services; prepare, edit and proofread written materials; make public presentations and communicate effectively both orally and writing; establish and maintain effective and cooperative working relationships with District Employees, member entities and the general public; provide effective customer service; plan, organize and implement special events; coordinate activities with other groups and agencies; work independently and deal effectively with stress caused by work load and time deadlines.

3. Special Qualifications:

Must possess a valid State of New Mexico driver's license with a satisfactory driving record. Must be able to work with no advance notice additional hours, evenings, on-call, holidays and weekends and be able to travel.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Frequent travel required in normal course of job performance.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director:  Date 4/14/2019



# North Central Regional Transit District Job Description

<b>Title:</b>	Transit Planner	<b>Code:</b>	165
<b>Division:</b>	Executive	<b>Effective Date:</b>	04/13
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/19
<b>FLSA Status: Exempt</b>			

GENERAL PURPOSE

Responsible for performing **technical, professional and analytical work** as well as day-to-day activities related to transit service planning and scheduling. Utilize a variety of software systems such as Intelligent Transportation System (ITS) and Geographic Information System (GIS) for data collection and system management in planning, development, and administration of transit services and programs.

SUPERVISION RECEIVED

Work under general supervision and guidance of the Transit Planning, Projects & Grants Manager.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Consistently provide high-level, detail-oriented, quality deliverables in multiple formats in a deadline driven environment. Establish and build positive, mutually-beneficial, professional relationships with internal and external customers and partners.

Collaborate with Transit Planning, Projects & Grants Manager (and other internal and external customers) to improve Agency efficiency, productivity and processes. Contribute to creation of standard operating procedures and advocate for regional transit service improvements. Assist in preparation of internal and external documents and presentations.

Manage Intelligent Transportation System (ITS), including performing stop, trip, run, block and route data entry; service modifications and calendar adjustments; service exceptions and deviations; new and/or relocated bus stops; upgraded/altered routing; et cetera. Analyze operating system to determine strengths, areas to improve efficiency and/or efficacy of service. Act as point of contact with ITS vendor and Google, ensure GTFS (general transit feed specification) feed and ITS data is updated as necessary. Utilize ITS and related software to compile relevant operational information, analyze and report on ridership and operational performance. Responsible for monitoring software and ITS system testing. Communicate with Transit Operations to ensure all ITS software and hardware is operational.

Utilize GIS software to collect and analyze data ranging from census information to utilities and right-of-way; create visual data representations and the like to contribute to overall route planning, grant submittal and service development process. Responsible for creation of maps from source data and calculated mapmaking information that may illustrate topographical features and political boundaries. Employ GIS software when applicable to demonstrate transit impacts to the community and guide transit planning efforts. Perform Geographic Information Systems mapping duties and prioritize project work plans with the use of survey notes and aerial photographic and satellite data. Assist Marketing in route brochure map creation as requested.

Responsible for performing tasks to support transit service delivery and operations; assist in the completion of an annual systemwide route assessment with tasks to include facility fieldwork, bus ride-alongs, Operator and Passenger interviews, existing route analysis, et cetera; assist in maintaining a systemwide transit facilities and amenities database and coordination between GIS and asset management software.

Assist in compiling data needed for various reports: NMDOT, National Transit Database (NTD), Project Progress, et cetera.

Contribute to the District's short- and long-range transportation plans and planning efforts, including member entities transportation plans as needed, general or land use plan elements; and contribute to the review and implementation of regional communities' transit planning efforts (to the extent feasible). Under the general guidance of the Planning, Projects & Grants Manager, may represent the District with the local development community (cities and counties) to ensure inclusion of the District within the planning and development process of private sector improvements which support public transportation. Engage and collaborate with cities, counties, Tribal entities, Regional Planning Organizations, Metropolitan Planning Organizations, other transit agencies and State of New Mexico Department of Transportation (NMDOT) Transit & Rail Division, Rio Metro RTD and NMDOT Park & Ride to encourage coordination amongst providers and to support effective current and future transit systems.

Act as liaison with NMDOT District Five (or appropriate governing agency) on new bus stop placements on roadways: initiate request, coordinate site visit, perform assessment with NMDOT staff. Ensure transit facilities and amenities information is accurate and up-to-date in the appropriate databases, and that all necessary bus stop approvals and usage agreements are in place and current.

Assist in planning for passenger amenity improvements, including examination, reporting and developing proposed improvements and new facilities. These facilities include bus shelters, bus stop benches, park and ride lots, litter receptacles, information kiosks and other facilities.

For assigned projects and developments, present plan aspects to citizens and governmental officials at the local, regional, state and federal levels. Present project updates, present on certain aspects of the transportation program and provide other information as requested. Develop population projections, demographic maps and economic development forecasts for the District and analyze environmental and societal impacts. Assist in the planning, development, implementation, and administration of the public transit program as assigned. Works with local and regional businesses and healthcare and human service agencies to develop ride sharing and trip reduction programs where feasible.

Assist with supporting system implementation, grant application and submittal process, and compliance with FTA regulations. Assist in cost estimates, establish measurable standards, guidelines, and procedures for NCRTD projects.

Provide additional interdepartmental support as necessary to ensure Agency service development and operational success.

Process departmental invoices; generate purchase orders and payment vouchers where applicable. Coordinate with Department Manager on approvals, work with Finance Staff to complete process including scanning of documents, assigning appropriate fund source, and submitting to Finance in a timely manner."

Perform other related duties as required.

#### MINIMUM QUALIFICATIONS

##### 1. Education and Experience:

A. A bachelor's degree from an accredited college or university.  
AND

B. Two (2) years of verifiable experience in public transportation, public transit, planning, management, GIS (ITS experience strongly preferred);

OR

C. An equivalent combination of education and experience (*GIS and ITS experience strongly preferred*).

##### 2. Knowledge, Skills and Abilities:

**Working knowledge** of methods, practices, and procedures involved in transit system planning, operations, and management; methods, practices, and procedures involved in local government transportation planning; transit equipment and relevant technologies; traffic and safety laws; modern business financial principles and practices; record keeping practices; marketing concepts; planning and construction contract administration; computer programs (word processing, spread sheets, database); AVL/CAD ITS and related software familiarity desired. Knowledge of GIS software required.

**Some Skill** in the art of critical analysis, diplomacy and cooperative problem solving; using personal computers and applicable software applications including spreadsheets and database programs; public speaking; responding to requests and inquiries from the general public as authorized; computer software programs including MS Word, Excel, Outlook, PowerPoint, GIS, ITS and route planning software.

**Ability to** effectively use GIS software. Ability to use and/or learn to use route planning and ITS software. Research funding sources to allow NCRTD to aggressively pursue potential and innovative funding and revenue generation ideas and leads from local, state and federal funding sources; conduct statistical and cost/benefit analysis; prepare complex financial and analytical reports and grants; research, analyze and evaluate a variety of data including financial, organizational, administrative and operational; prepare concise and effective written communications; contribute to multiple projects and operations simultaneously; work independently, effectively manage time, often under strict deadline, while working within project budget; maintain credibility while balancing competing demands within the District; build and maintain effective working relationships with those contacted in the course of work using principles of good customer service both internally and externally; make public presentations and communicate effectively both orally and in writing; establish and maintain positive, effective and cooperative working relationships with District Employees, member entities and the general public; exercise independent judgment in the analysis and solution of complex service planning and scheduling issues.

##### 3. Special Qualifications:

Must be available to periodically work outside of regular business hours, as required by the demands of the position (special event, public meeting, bus ride-along, et cetera). Must possess a valid NM driver's license with a satisfactory driving record. Familiarity working in union and non-union environments.

Familiarity with public transit necessary. Comfortable speaking in front of elected officials and the public, capable of fielding questions and addressing concerns as presented.

## 4. Work Environment:

Typically perform duties in an office setting with appropriate climate controls. Field work is required periodically, with the work area often being along the roadway and/or in right-of-way and in a variety of weather and conditions. Tasks require a variety of physical activities, generally involving moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, selective thinking and assessment, and creative problem solving.

## 5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director:

*Anthony J. Morillo*

Date

*06/14/2019*



# North Central Regional Transit District Job Description

<b>Title:</b>	Finance Director	<b>Code:</b>	200
<b>Division:</b>	Finance	<b>Effective Date:</b>	04/13
<b>Department:</b>	Administration	<b>Last Updated:</b>	04/19
<b>FLSA Status: Exempt</b>			

GENERAL PURPOSE

Performs a variety of **professional, administrative and managerial** duties related to planning, directing, organizing, and controlling the financial operations of the District, including, accounting, revenue, debt, investments, payroll, budget, financial analysis, performance reporting, and grants administration in accordance with District policies and procedures. This is an "At-Will" classification which means the Finance Director serves at the will of the Executive Director and may be removed at any time without cause, notice, or right of appeal.

SUPERVISION RECEIVED

Works under the general supervision of the Executive Director.

SUPERVISION EXERCISED

Provides close to general supervision to Departmental staff.

ESSENTIAL FUNCTIONS

**Financial Management:** Provides financial guidance in day-to-day and long-term financial operations; responsible for the accuracy and legal performance of the District's financial transactions and administration; manages governmental accounting functions; directs and prepares District-wide budget; coordinates budget development process with Executive Director and various District department heads; forecasts revenues and expenditures.

Creates, integrates, and evaluates the financial programs and supporting information systems of the District to include budgeting, accounting, payroll, audit, grants administration, debt, investments, performance reporting, revenue and all related finance operations; oversees the monitoring of complex financial analyses.

Coordinates the development of the District's annual budget and develops financing plans for future projects. Develops department budget and assists and coordinates the review of Districts department budgets with department heads. Reviews legislative proposals for potential financial impacts on the District.

**Investment Administration:** Oversees the monitoring, maintenance, and management of the Districts investments to ensure optimum yields consistent with the Board approved Investment policy.

Coordinates the preparation of financial statements, financial reports, special analyses and informational reports. Keeps apprised of laws, regulations and financing methods that address the district's funding requirements and obligations. Ensures compliance with state and federal reporting requirements for budgets, audits and other financial documents; inclusive of but not limited to GASB, FASB, NM Office of the State Auditor, and NM Department of Finance Administration.

**Procurement Administration:** Oversees District-wide procurement practices; assures proper competitive pricing and bidding for contracts, services, and purchases; oversees the ongoing education and training of District staff related to procurement policy, practices and procedures. Interactive with outside vendors/contractors related to RFP's, RFQ's, etc. during the process of bidding and notice of award.

**Grant Administration:** Oversees grant, financial and statistical reporting function with appropriate agencies at the State and Federal level. Initiating and updating grant applications and financial reporting in the TEAM Web system. Interact with partnering Pueblos for Tribal federal grant administration, inclusive of but not limited to detail of funds for reimbursement and invoicing.

**Quality Control & Auditing:** Reviews recommended contractor proposals for financial soundness. Manages complex data analysis projects, oversees the maintenance of related records systems and databases for financial tracking, reporting, and research purposes, and administers complex programs and assigned projects to Finance staff. Administers internal audit worksheets and analysis and determines areas of concern and internal control gaps where needed.

Coordinates annual external audit; directs and coordinates various closing functions; serves as internal auditor. Prepares and presents periodic and annual financial statements summarizing the fiscal condition and projections for the District.

**Fixed Asset Management:** Maintains and monitors records of inventory of equipment purchased by the District and records necessary to prepare required reports. Manages and updates fixed asset record keeping system; performs fixed asset accounting and maintains accurate life of equipment for depreciation purposes; tracks all new purchases, all inter-departmental transfers, and all property disposals for all departments; prepare and tracks special database on sensitive items inventory; prepares ad-hoc reports on fixed assets for individual department requests; Conducts or directs annual physical inventory and ongoing inventories by department of types of equipment of all District assets as well as work with individual department heads to spot check inventories throughout the year.

Conducts capital asset audits in compliance with state, federal and GASB standards and NCRTD's Fixed Asset and Inventory policy and procedures; monitors and assists finance and purchasing staff with internal controls, internal auditing and assures accurate posting of asset data.

**Debt Management:** Responsible for overseeing, managing and planning the District's debt management functions required to finance infrastructure and significant capital improvements; conducts research to facilitate debt issuances based on capital funding requirements and district objectives; prepares documents that support debt capacity including calculation of liquidity and financial ratios, amortization schedules, pricings, closings and ratings required for board presentations; and ensures compliance with limitations under CRS, District Policies and other applicable laws; performs detailed reporting of cash flows and forecasting, tracking projections versus actual variances and post issuance compliance and monitoring reports.

**General Operations & Administration:** Performs as an integral member of the Senior Leadership Team to ensure effective interfaces and integration of activities with other organizational units.

Establishes departmental direction through objectives and programs in conjunction with goals set by the Executive Director. Develops finance department policies and procedures. Manages department to ensure adherence to organization's policies, procedures, and standards as well as productivity and utilization of all staff in the District.

Recruit, hires, trains, supervise and evaluates department staff. Oversees performance management and administers performance evaluation of department staff including preparing and monitoring individual staff and department goals.

Manages the work of staff including coaching staff for improvement and development, training, assigning, reviewing and evaluating work performance; coordinating activities, maintaining standards, allocating personnel, selecting new employees, acting on employee compliance issues and recommending and implementing employee discipline.

Monitors staff compliance with District's policies and procedures; as well as local, state and federal rules and regulations. Ensures the proper maintenance of employee records and department statistics related to assigned operations. Conducts special projects, performs analyses and develops plans as requested by Executive Director. Prepares Board reports and other reports as needed. Assist with special projects as required, and other duties as assigned.

Represents the District externally to other governmental agencies, funding agencies, stakeholders and the general public as requested. Makes oral and written presentations to senior staff, Board of Directors and outside agencies and organizations as needed in relation to the financial structure of the District.

Guards the District against theft or fraud through the establishment of internal controls and other mechanisms. Manages complex data analysis projects, oversees the maintenance of related records systems and databases for financial systems.

Performs related duties as required.

**MINIMUM QUALIFICATIONS**

1. Education and Experience:

A. Graduation from college with a bachelor's degree in accounting, finance, business administration or related;

AND

B. Ten (10) years of progressively responsible experience related to above duties; that includes at least three (3) years supervision of professional and clerical staff.

OR

C. An equivalent combination of education and experience.

2. Knowledge, Skills, and Abilities:

**Extensive knowledge of** principles, laws, rules and regulations relating to transit operations and practices related to government finance, accounting and budgeting; accounting principles practices and procedures (GFOA, GAAFR, GAAP, FASB and GASB); public finance and fiscal planning; public organizations and department operations including applicable laws and regulations; internal control principles and methods of application; budgeting, accounting and related statistical procedures; various revenue sources available to public agencies including state and federal sources; local investment options and opportunities; general office maintenance and practices; basic personnel management practices and procedures; computer accounting spreadsheet applications and various software financial programs; business and technical writing; operation of standard office equipment; debit and credit accounts and General Ledger and advanced accounting; interpersonal communication skills and telephone etiquette; public relations. **Considerable knowledge of** principles of management, supervision and employee motivation.

**Considerable skill** in the art of diplomacy and cooperative problem solving; leadership and organizational behavior management; establishing and maintaining effective working relationships with State, Federal, and other local officials, elected officials, subordinate staff, and District residents; coordinating flow of information and communication between staff, consultants, committees, and Board of Directors; the operation of PC Computer, calculator, fax machine, copy machine, telephone.

**Ability** to maintain strict confidentiality of all privileged documents and information; communicate financial information in a clear and concise manner; conduct self in an appropriate manner as a representative of the District, working effectively in a diverse work environment; apply District's financial regulations and to prepare and administer an annual budget; analyze and interpret financial information and prepare accurate financial statements; be public service oriented with tactful and effective conflict resolution skills;

make effective oral presentations to staff, committees and the Executive Board; establish and maintain effective work relationships with a variety of groups and individuals; have a creative, inquiring and innovative manner willing to explore new approaches, implement new methods, and be receptive to suggestions of others; plan and supervise the work of subordinate staff including coordinating, prioritizing, assigning, monitoring, and evaluating work; hiring, training, counseling, and disciplining staff; and processing grievances; analyze and recommend solutions to complex operational and personnel problems and issues; make sound decisions, establish and maintain procedures for effective daily operation of the finance department; operate a computer including word processing, spread sheet and data base applications; perform basic mathematical calculations; develop and monitor a department and divisional budgets and establish budgetary controls; prepare concise and effective written communications; manage multiple projects and operations simultaneously; work independently under time deadlines and within project budget; maintain credibility while balancing competing demands within the District; build and maintain effective working relationships with those contacted in the course of work using principles of good customer service; make public presentations and communicate effectively both orally and writing; establish and maintain effective and cooperative working relationships with District Employees, member entities and the general public; effectively manage time and work to meet deadlines exercise independent judgment in the analysis and solution of complex problems and issues.

3. Special Qualifications:

Must be bondable. The possession upon hire or acquisition after, of one, or more professional credentials, i.e., CPA (Certified Public Accountant), CGFM (Certified Government Financial Manager) or CPFO (Certified Public Finance Officer) is desirable, but not mandatory.

4. Work Environment:

Typical office setting with typical climate controls. Tasks require a variety of physical activities such as walking, standing, stooping, sitting, reaching, which may involve light muscular strain. Job functions normally require talking, hearing and seeing. Common eye, hand, finger dexterity required for most essential functions. Mental application utilizes memory for details, verbal instructions, emotional stability, discriminating thinking and creative problem solving.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

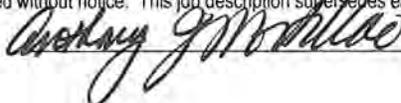
In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director:



Date

6/14/19



# North Central Regional Transit District Job Description

<b>Title:</b>	Senior Accountant	<b>Code:</b>	210
<b>Division:</b>	Finance	<b>Effective Date:</b>	04/13
<b>Department:</b>	Administration	<b>Last Updated:</b>	04/19
<b>FLSA Status: Exempt</b>			

GENERAL PURPOSE

Performs a variety of **full performance professional quantitative and qualitative financial analysis and accounting** work in the development, implementation, and management of the district budget, applying fundamental budgetary concepts, practices, and procedures; maintains the accuracy of the District's general ledger financial system; applies accepted accounting principles (GAAP) and procedures recommended by the Government Accounting Standards Board (GASB) to analyze financial information, prepares accurate financial reports, and ensures appropriate accounting internal control procedures. Supports the Finance Director in all key areas of finance responsibility and performs and leads special projects as directed.

SUPERVISION RECEIVED

Works under the general supervision of the Finance Director.

SUPERVISION EXERCISED

Provides functional supervision to Staff Accountant and/or Finance Specialist on a project-by-project basis while in training or as needed.

ESSENTIAL FUNCTIONS

Assists with the management of Finance Department operations. Performs a variety professional-level governmental accounting and performs complex analysis and accounting duties in the preparation, maintenance and processing of accounting records and financial transactions including accounts payable, accounts receivable, payroll functions, HR benefits administration, purchasing and budgetary functions.

Analyzes, reviews, and approves documents and accounting entries to ensure accuracy of information and calculations for each account of record; maintains the necessary records/files to support transactions related to area of assignment; ensures proper coding of the general ledger account, verifies, accounts payable entries, billing, cash receipts, and adjusting journal entries.

Coordinates with the Finance Director the preparation of year-end closing; monitors cash flow and cash requirements; participates in financial audits; compile and prepare supporting schedules, work papers and financial reports requested by Finance Director and external auditors

Prepares, codes, and inputs complex entries into the District's accounting/payroll/timekeeping systems; compiles and prepares computerized reports/spreadsheets based on District, state, or federal requirements related to area of assignment.

Plans and carries out budget procedures, including monthly monitoring of department expenditures and revenues and communicating monitoring status to management; provides information to District staff.

Analyzes and monitors fiscal records utilizing techniques and statistical methods to identify patters, data correlation, and informational forecasting to make recommendations based on conclusions derived from such analyses; prepares computerized reports and spreadsheets; analyzes and verifies monthly financial reports related to area of assignment; adheres to department audit and control procedures; ensures accurate general ledger reporting.

Assists departments in the preparation of department and division budgets and budget materials; assists in the development of multi-year forecast estimates for division expenditures and revenues; Responds to inquiries of staff and administration regarding District financial policies and procedures for the purpose of providing information and direction to the inquiry; assists with special studies that require data compilation; analyzes and interprets information in oral and written presentations.

Assists in the fiscal evaluation of proposed legislation/Executive Board proposals; research and respond to budget surveys; assists in the preparation of operating budgets, revenue and expense projections, - and other specialized financial reports and analyses; prepares technical details of the annual District budget; reviews current conditions of approved budgets and expenditures for possible discrepancies.

Tracks and reports Transit Gross Receipts Tax and federal grant revenue; posts accounts payable and payroll batches, budget transfers, budget loads, and journal voucher entries; prepares budget transfers and ensures that transfers are made in an accurate and timely manner.

Develops and recommends modifications to the procedures, process or on-line budget and other financial systems; participates in the District's transit performance measurement and reporting and cost allocation system; ensures strict confidentiality of financial records.

Analyzes and verifies monthly financial reports related to various assignments; recommends various departmental audit control procedures; ensures accuracy of general ledger reporting; reviews transactions to ensure proper coding of organizational accounts, projects, accounts payable, billing, cash receipts and general ledger entries; assists to monitor fixed asset status.

Provides budgetary and financial advice to Executive Director, Finance Director and other program managers on budget related matters, such as funding availability, effects of budget changes, status of use of funds, etc.

Performs pre-audits of all payment packets (accounts payable) for the purpose of ensuring accuracy and appropriateness prior to payment in compliance with District and state/federal FASB/GASB rules, guidelines and statutes.

Reconciles federal grant revenues and expenditures; prepares drawdowns for federal grants; prepares a variety of monthly, quarterly, periodic and annual financial, budget and statistical reports.

Coordinates activities of payroll; review payroll account reconciliations; oversee the maintenance of current employees' data systems; manage and resolve issues relating to payroll production; monitor the accurate processing of staff hiring's, promotions and terminations; prepares federal and state payroll tax reporting and payments; adhere to HR/payroll policies and procedures; and support all internal and external audits related to payroll.

Prepares reports as required by terms of grants, prepares assigned portion of Comprehensive Annual Financial Report (CAFR), Budget Book, and other reports as required by management. Examples include Indirect and Direct Cost Reports, Cost allocations, the Annual Financial Information Report, the Schedule of Expenditures of Federal Awards (SEFA), and maintains capital asset reports.

Assists with special projects as required and other duties as assigned.

#### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from college with a bachelor's degree in accounting, finance, business administration or related;

AND

B. Four (4) years of progressively responsible experience related to above duties;

OR

C. An equivalent combination of education and experience.

2. Knowledge, Skills, and Abilities:

**Thorough knowledge** of policies and procedures pertaining to the work of assigned department; -principles and practices of basic to advanced accounting, finance, or budgeting; -budget funding sources and local governments in general; - computer software systems related to accounting, budgeting, and payroll systems; modern office procedures, methods, and procedures; -personal computer word processing/spreadsheet software in a Windows environment; pertinent governmental accounting standards and regulations; pertinent District functions, policies, rules and regulations. **Considerable knowledge of** principles, laws, rules and regulations relating to transit operations and practices related to government finance, accounting and budgeting; accounting principles practices and procedures (GFOA GAAFR, GAAP and GASB); public finance and fiscal planning; internal control principles and methods of application; budgeting, accounting and related statistical procedures; general office maintenance and practices; computer accounting applications and various software financial programs; business and technical writing; operation of standard office equipment; mathematics and advanced accounting; interpersonal communication skills and telephone etiquette; public relations.

**Skill** in the art of diplomacy and cooperative problem solving; establishing and maintaining effective working relationships with state, federal, and other local officials, elected officials, subordinate staff, and District residents; the operation of PC Computer, calculator, fax machine, copy machine, telephone.

**Ability** to maintain strict confidentiality of all privileged documents and information; contribute to a team effort and accomplish related results as required; communicate financial information in a clear and concise manner for policy makers; conduct self in an appropriate manner as a representative of the District, working effectively in a diverse work environment; apply District's financial regulations; analyze and interpret financial information and prepare accurate financial statements; be public service oriented with tactful and effective conflict resolution skills; make effective oral presentations to staff, committees and the Executive Board; establish and maintain effective work relationships with a variety of groups and individuals; communicates effectively both orally and in writing.

3. Special Qualifications:

MBA in Finance or related field, CPA (Certified Public Accountant), CGFM (Certified Government Financial Manager) or CPFO (Certified Public Finance Officer) is highly desired.

4. Work Environment:

Typical office setting with typical climate controls. Tasks require a variety of physical activities such as walking, standing, stooping, sitting, reaching, which may involve light muscular strain. Job functions normally require talking, hearing and seeing. Common eye, hand, finger dexterity required for most essential functions. Mental application utilizes memory for details, verbal instructions, emotional stability high level of work ethic, discriminating thinking and creative problem solving.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

\*\*\*\*\*

**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director: Anthony J. McIlwain Date 6/14/19



# North Central Regional Transit District Job Description

<b>Title:</b>	Financial Specialist	<b>Code:</b>	220
<b>Division:</b>	Finance	<b>Effective Date:</b>	04/19
<b>Department:</b>	Administration	<b>Last Updated:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs a variety of **working level** duties as needed to expedite various financial operations of the District, including, accounting, banking, payroll, contract tracking, leave accounting, accounts receivable and/or accounts payable in accordance with District policies and procedures.

SUPERVISION RECEIVED

Works under the general supervision of the Finance Director.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Performs various day-to-day working level technical and complex accounting and bookkeeping duties; which include monitor and posting of financial and bookkeeping details as needed to ensure accuracy of financial records and transactions; verifies expense reimbursements.

Assists with recording keeping and maintaining staffing records; processes time sheets and records leave accrual and usage; may generate periodic reports documenting leave account balances and usage patterns; coordinates District Staff leave slips and timesheets; prepare payroll checks for distribution/file timesheets in payroll files on a bi-weekly basis; files finance & administrative files, scan all official documents, enter insurance information into the system and send all correspondence to the appropriate agencies for insurance and benefits.

Assist in yearly audit by providing supporting documentation when requested by auditors; conducts records research and organizes various files as needed to complete orderly internal and external audits.

Assists the Finance Director with assigned worksheets in relation to internal audits as assigned but not limited to internal controls, inventory, contracts, etc.

Performs a variety of routine accounting duties in the preparation, maintenance and processing of accounting records and financial transactions including accounts payable, accounts receivable, payroll functions.

Reviews documents and verifies accounting entries to ensure accuracy of information and calculations for each account or record; maintains the necessary records/files to support transactions related to area of assignment; prepares, codes, and inputs entries into the District's accounting/payroll systems; assists and prepares computerized reports/spreadsheets based on District, state, or federal requirements related to area of assignment.

Builds and maintains positive working relationships with District employees and the public using principles of good customer service;

Track and monitor all fixed assets, tag all fixed and security assets, enters information onto accounting software to report and track the depreciation of the assets.

Serve as back up to the Administrative Assistant when he/she is out of the office. Also assist with the bilingual interpretation when the public comes with bus scheduling questions.

Assists with special projects as required and other duties as assigned.

MINIMUM QUALIFICATIONS

1. Education and Experience:
  - A. Graduation from college with an associate's degree in accounting, finance, business administration or related;

AND

B. One (1) year of experience performing above or related duties:

OR

C. An equivalent combination of education or experience.

## 2. Knowledge, Skills, and Abilities:

**Some knowledge of** bookkeeping and general accounting techniques most appropriate to computerized systems; personal computer operations and applications; laws and regulations governing accounting responsibility and payroll processing; bidding requirements and related regulations; general office management; inter-personal communication skills.

**Skill in** the operation of personal computer and data entry applications/software.

**Ability to** maintain strict confidentiality of all privileged documents and information; communicate financial information in a clear and concise manner for policy makers; conduct self in an appropriate manner as a representative of the District, working effectively in a diverse work environment; work quickly and accurately with numbers; perform advanced mathematical computations; operate various types of office equipment such as adding machine, typewriter, etc.; work under time pressures in meeting deadlines; communicate effectively and verbally and in writing; develop and maintain effectively working relationship with elected officials, professionals, the public and fellow employees.

## 3. Special Qualifications:

None.

## 4. Work Environment:

Employee works in a typical office setting with typical climate controls. Tasks require a variety of physical activities such as walking, standing, stooping, sitting, reaching, which may involve light muscular strain. Job functions normally require talking, hearing and seeing. Common eye, hand, finger dexterity required for most essential functions. Mental application utilizes memory for details, verbal instructions, emotional stability, discriminating thinking and creative problem solving.

## 5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

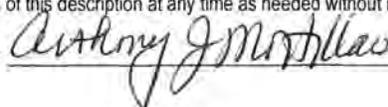
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- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
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- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
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Approved by Executive Director:



Date

06/14/2019



# *North Central Regional Transit District*

## **Job Description**

<b>Title:</b>	Grants and Projects Specialist	<b>Code:</b>	<b>165</b>
<b>Division:</b>	Executive	<b>Effective Date:</b>	04/20
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/20
<b>FLSA Status: Exempt</b>			

### GENERAL PURPOSE

Performs a variety of **professional and technical administrative duties** related to ongoing management of the Federal Transit Administration (FTA) grants and any other grants and analyzing, evaluating, planning, and coordinating overall transit services and structures.

### SUPERVISION RECEIVED

Works under general supervision of the Strategic Initiatives and Planning Manager.

### SUPERVISION EXERCISED

None.

### ESSENTIAL FUNCTIONS

#### **Grants**

Performs grant research, prepares and submits applications, monitors compliance with grant specifications and conditions; prepares and submits various financial reports as required by grantors; coordinates interdepartmental contributions to various projects including Operations, Finance and the Public Information Office.

Identify and research the sources of funding and prepare applications and amendments and monitor and comply with funding requirements.

Perform tasks associated with Federal and DOT reporting requirements which include NTD Reporting and Rural Transit Data required by the FTA through the NMDOT.

Administers the Federal Transit Administration (FTA) program grants including formula fund grants, and discretionary grants for transit operations and capital purchases.

Obtains required information internally and externally to draft documents for grant applications.

Utilizes FTA and New Mexico Department of Transportation system software to apply for and track grants and other reporting (i.e. ridership, revenue-hours, accidents, fleet status, maintenance expenditures, etc.).

Ensures compliance with federal and FTA requirements regarding contracting, procurement, and allowable expenses, depending on grant source.

Coordinates and works with the Santa Fe Metropolitan Planning Organization and the Northern Pueblos Regional Transportation Planning Organization to ensure that District transit grants are appropriately identified in the Metropolitan and State Transportation Improvement Program.

Develops departmental grant policies and procedures, as needed; reviews existing policies to ensure compliance with the Federal Transit Administration.

Reconciles and conducts financial analysis of federal grants awarded to the City and oversees the disbursement of funds to subrecipients; may perform associated accounting and financial work.

Develops documentation for grants to ensure appropriate management of documents represents accurate records of grant management.

Compiles information related to each grant to justify the use of the grant funding, develops reports to report back to the granting agency, as required.

Provides justification and summaries on the use of grant funds; develops federal and milestone reports for each grant.

Conducts cost/price analyses and gathers information required for independent cost estimates as necessary for procurement purposes.

Monitors grant expenditures to ensure actual expenditures do not exceed the projected expenditures and that expenditures are allowable based on the source of funds.

Develops quarterly reports and other reports as needed.

Reviews files and programs for contractors and subrecipients to verify that the contract or subrecipient is suitable and following FTA regulations for grant funds.

Maintains files and records and ensure compliance with local, state and federal recordkeeping requirements.

### **Projects**

Coordinates major special operational and/or administrative projects including service restructuring plans and activities related to service changes as assigned.

Coordinates special projects including District's compliance with the Americans with Disabilities Act, Title VI, Federal and State compliance and Para transit and demand services evaluations.

Track and record ridership on all routes as well as total annual ridership for monthly reporting; monthly analyze ridership information reported through AVAIL. Assure that all reports are turned in for tabulation and inclusion in statistics; prepare appropriate monthly statistical reports including illustrative information on each route, ridership performance, as well as total annual tracking for reporting.

Coordinates with Operations Department and Public Information Office to develop plans to promote new routes and major changes that offer the greatest opportunity for increased ridership.

Conducts special projects, performs analyses and develops plans as requested by Strategic Initiatives and Planning Manager; prepares Board reports and other reports; utilizes AVL/CAD software to generate, analyze and prepare management assessments as needed.

Performs other related duties as required.

### **MINIMUM QUALIFICATIONS**

1. Education and Experience:

- A. Graduation from college with a bachelor's degree from an accredited college or university in Transportation, Public Administration, Transportation Planning, Business Administration or another related field.

AND

- B. One (1) years of (full-time equivalent) verifiable professional transit planning or related operational or administrative experience.

OR

- C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Knowledge of** methods and techniques of researching and interpreting data and information; principles and practices of public transit systems; federal and state funding sources related to transit; statistical methods and proficiency with related software. Some knowledge of socioeconomic data collection and analysis methods; forecasting and modeling processes. General knowledge of grant writing.

**Skill** in the art of diplomacy and cooperative problem solving; using personal computers and applicable software applications including spreadsheets and data base programs; public speaking; responding to requests and inquiries from media and the general public as authorized.

**Ability to** identify funding sources and write grants and to aggressively pursue potential and innovative funding and revenue generation ideas and leads from local, state and federal funding sources; conduct statistical and cost/benefit analysis; prepare complex financial and analytical reports and grants; research, analyze and evaluate a variety of data including financial, organizational, administrative and operational; prepare concise and effective written communications; manage multiple projects and operations simultaneously; work independently under time deadlines and within project budget; maintain credibility while balancing competing demands within the District; build and maintain effective working relationships with those contacted in the course of work using principles of good customer service; Make public presentations and communicate effectively both orally and writing; establish and maintain positive, effective and cooperative working relationships with District Employees, member entities and the general public; exercise independent judgment in the analysis and solution of complex service planning and scheduling issues.

3. Special Qualifications:

Must be available to work outside regular business hours, as required by the demands of the job. Must possess a valid Driver's License with a satisfactory driving record. Demonstrated skill in computer software programs including MS Word, Excel, Outlook, and PowerPoint. Demonstrate regular and reliable attendance. Project a positive image and support for the Executive Director's Office and NCRTD at all times.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving.

5. Professional Standards:

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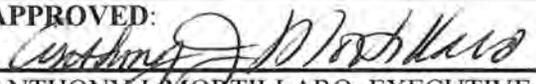
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Approved by Executive Director: \_\_\_\_\_ Date: \_\_\_\_\_

(b) Code of Conduct Policy  
**See next pages.**

# NORTH CENTRAL REGIONAL TRANSIT DISTRICT

<b>SUBJECT:</b> Code of Conduct	<b>NUMBER:</b> HR-10
<b>EFFECTIVE DATE:</b> May 3, 2019	Adopted by Board Resolution Resolution #2019-17
	<b>APPROVED:</b>  ANTHONY J. MORTILLARO, EXECUTIVE DIRECTOR

## 1.0 Objective:

The goal of this policy is to establish in clear and simple terms the District's expectations for its Employees. Nothing herein is intended or shall be deemed to alter minimum legal requirements of the Governmental Conduct Act, and the District's Procurement Policy or any other state or federal laws imposing standards of conduct upon the District, its Employees, Officers and agents.

## 2.0 Coverage:

The district is a "local government agency" within the meaning of NMSA 1978, Section 10-16-2 (G) and its Employees and board members are "public Officers or Employees" within the meaning of NMSA 1978, Section 10-6-2 (I). The Governmental Conduct Act (NMSA 1978, Section 10-16-1 et seq.) imposes mandatory minimum standards for the conduct of District Employees and authorize the creation of this Code of Conduct pursuant to NMSA 1978, Section 10-6-11 (C ) and shall be reviewed "at least once every four years" pursuant to NMSA 1978, Section 10-6-11 (D). For purposes of this Policy an "Officer" is an elected or appointed official who serves on the District Board and an "Employee" is a person employed by the District as further defined in the District's Personnel Rules.

## 3.0 Roles and Responsibilities:

Each Employee of the District is responsible for familiarizing themselves with this Code of Conduct and complying with the Code of Conduct. Training, and responses to questions and concerns will be the responsibility of the Executive Director, the Human Resources Director and the District's legal counsel.

## 4.0 Guiding Principles:

The Guiding Principles for conduct are established in the District's Mission and Vision statements and Long Range Strategic Plan. The District's mission is "to provide safe, secure and effective public transportation within North Central New Mexico in order to enhance the quality of life of our citizens by providing mobility options and spur economic opportunities throughout the region." The District's vision is "to be the leading rural public transportation organization connecting communities and enhancing cultural, environmental, social, and economic opportunities for

the betterment of our region."

In order to achieve the District's mission and live up to its vision District Employees must conduct themselves in a caring and professional manner that inspires public trust and confidence.

All District related actions by Employees of the District shall aim to advance the District's mission and vision and shall not be performed for personal gain excepting such compensation or payments as may be called for by the District's employment policies and rules.

#### **5.0 Public Trust:**

In performing acts on behalf of the District, Employees shall act in a "public trust" capacity pursuant to NMSA 1978, Section 10-6-3 (A) of the Governmental Conduct Act. This means that Employees shall use the powers and resources of the District only to advance the public interest and not to obtain personal benefits or pursue private interests. This includes the requirement that District Employees:

- 5.1 shall strive in all their actions to bring credit to the District; and
- 5.2 shall conduct themselves in a manner that justifies the confidence placed in them by the people, at all times maintaining the integrity of and discharging ethically the high responsibilities of public office; and
- 5.3 shall not use or disclose confidential information obtained by virtue of their employment for their own or another person's benefit or private gain.

#### **6.0 Compliance with Law:**

The minimum standard for all persons covered by this Code of Conduct is that they comply with the law. District Employees are expected to comply with all safety and fair dealing laws, and to be ethical and responsible when dealing with the District's finances, property, and in dealing with riders. Specific laws that should be considered include but are not limited to the following state laws:

- The Governmental Conduct Act, NMSA 1978, Sections 10-16-1 et seq, 10-16-6 through 10-16-9, 10-16-11, 10-16-13.1 through 10-16-14 and 10-16-17.
- The Whistleblower Protection Act, NMSA 1978, Section 10-16C-1 et seq.
- The Fraud Against Taxpayers Act, NMSA 1978, Section 44-9-1 et seq.
- The traffic laws of the State of New Mexico, NMSA 1978, Section 66-7-2 et seq.
- The Human Rights Act, NMSA 1978, Section 28-1-1 et seq.

Although the Gift Act (NMSA 178, Section 10-16B-1 et seq.) the Financial Disclosure Act (NMSA 1978, Section 2-11-1 et seq.) and the Procurement Code (NMSA 1978, Section 13-1-1 et seq.) do not technically apply to the District they nevertheless provide useful guidance on the ethical standards for public employees.

#### **7.0 Prescribed Employee Conduct:**

It is the policy of the District that certain rules and regulations regarding Employee behavior are necessary for efficient business operations and for the benefit and safety of all Employees and the public. Conduct that interferes with operations, discredits the District, is in violation of District policy, is unsatisfactory or is offensive will not be tolerated. Employees are expected at all times to conduct themselves in a positive manner to

promote the best interests of the District. Examples of behavior that may result in disciplinary action, up to and including possible termination, are:

- 7.1 treating others in a discourteous manner;
- 7.2 wearing clothing inappropriate for the work being performed;
- 7.3 failing to report to work punctually at the assigned times, or failing to be at the proper work-station ready for work as scheduled;
- 7.4 failing to maintain cleanliness and order in the workplace and work areas;
- 7.5 fighting with or assaulting others;
- 7.6 threatening or intimidating others;
- 7.7 falsifying or altering any District record or report, such as an application for employment, a medical-report, a time record, a financial record;
- 7.8 stealing, destroying, defacing or misusing District property or another's property;
- 7.9 engaging in acts of insubordination including, but not limited to, refusing to follow managements instructions concerning a job-related matter<sup>1</sup>;
- 7.10 using profanity or abusive language;
- 7.11 sleeping on the job;
- 7.12 gambling on District property;
- 7.13 playing malicious or dangerous pranks or practical jokes, or engaging in horseplay,
- 7.14 alcohol and substance abuse;
- 7.15 dishonesty;
- 7.16 sexual and any other form of illegal harassment;
- 7.17 possession of weapons on District property;
- 7.18 poor work performance;
- 7.19 violation of District leave policies; and
- 7.20 violation of other District policies or directives.

## **8.0 Respect:**

All District Officers and Employees should show respect for one another, for riders, and for all persons having business dealings with the District. Basic standards for showing respect require that Employees refrain from harassment, and treat colleagues equally regardless of class or classifications including such things as race, age and gender. Refraining from the use of profane language and limiting discourse to topics that will elicit anger, hostility and argument are the most basic ways in which to show respect. Refraining from comments that demean others and condemning the ideas or beliefs of another are also signs of respect.

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<sup>1</sup> Refusal to follow instructions based upon alleged safety issues, or in the event the instruction is alleged to require a violation of the law or of a Collective Bargaining Agreement shall be handled through the District's Personnel Rules.

## **9.0 Professionalism:**

All District Employees shall maintain a high level of professionalism. The fundamental requirements of professionalism are set forth in the District's Professional Standards and Values. Additional considerations are as follows:

- 9.1 Personal Appearance shall be maintained through proper attire and hygiene in accordance with the District's dress code;
- 9.2 Officers and Employees shall familiarize themselves with their authorized role and job duties and shall refrain from actions beyond their authority or outside the scope of their job duties;
- 9.3 Officers and Employees shall fulfill their duties in a timely manner;
- 9.4 Employees shall accept and take direction from those persons having direct authority over them including supervisors, managers, directors, the Executive Director,
- 9.5 Employees shall not take direction from the Board Chair or individual Directors unless expressly authorized by the Executive Director or a written law or policy;
- 9.6 Officers and Employees shall at all times attempt to mentor and assist persons with less experience by providing useful suggestions and guidance rather than through orders or directions;
- 9.7 Supervisors and managers shall refrain from abusing their authority and shall delegate work according to the competence and workload of the Employees;
- 9.8 Employees shall arrive to work on time, prepared for work and shall not absent themselves from work at a time or in a manner that causes their colleagues to have to take on additional work, shifts or work tasks.

## **10.0 District Property:**

All District Employees should treat District property including vehicles, equipment, tools, money, buildings, data, documents and information, with care and protect it against improper use or damage. District property shall be kept clean and in good repair and District tools shall only be used for their intended purposes. Use of District computers, phones and software shall be primarily for the benefit of the District and shall only be used for personal reasons on a limited and incidental basis as set forth in the District's other policies.

## **11.0 Corruption:**

All actions or transactions by Employees which are illegal and/or corrupt are strictly prohibited and will result in referring the matter to the appropriate law enforcement agency. Criminal anti-corruption laws include but are not limited to:

### **State Criminal Laws**

- Bribery: § 30-24-2
- Concealing campaign funds: § 1-19-34.3
- Demanding illegal fees: § 30-23-1
- Embezzlement: § 30-16-8
- Extortion: § 30-16-9
- RICO: § 30-42-4

Soliciting or receiving illegal kickbacks: § 30-41-1

Tampering with public records: § 30-26-1

Unlawful interest in a public contract: § 30-23-6

### **Federal Criminal Laws**

RICO: 18 U.S.C. §§ 1961, 1962

Extortion: 18 U.S.C. § 1951

Mail fraud: 18 U.S.C. § 1341

Using fictitious name: 18 U.S.C. § 1342

Wire fraud: 18 U.S.C. § 1343 • Tax evasion: 26 U.S.C. § 720

### **12.0 Gambling:**

"Gambling" shall have the meaning given by New Mexico law regarding regulated or illegal gaming. Gambling on District property is prohibited. Fund raising activities that involve raffling off of items to generate funds for Employee benefits is permitted. Other forms of gambling as a fund raising activity are prohibited.

### **13.0 Drugs and Alcohol:**

The use of drugs and alcohol by District Employees are regulated under the District's Personnel Rules and specific Drug and Alcohol related policies. In addition to those requirements all District Employees shall refrain from any use of illegal drugs and shall take care in the use of legal drugs to ensure the public safety.

### **14.0 Weapons:**

District Officers and Employees shall refrain from bringing any weapon prescribed under the District's Personnel Rules onto District property without the prior written approval of the Executive Director. The Executive Director may permit weapons upon District property if the Officer or Employee discloses the weapon and demonstrates to the Executive Director's satisfaction that the weapon will be securely stored (in the persons vehicle or otherwise) in such a manner as to ensure that the presence of the weapon on District property will not create a risk to the District or the public and that the presence of the weapon on the District property will not constitute intimidation or harassment of District Officers, Employees, or the public. Weapons in the possession of Public Safety Officers and Security Officers contracted by the District are exempt.

### **15.0 Gifts and Favors:**

Gifts and favors by and from public Employees are generally regulated by the State of New Mexico Gift Act (NMSA 1978, Section 10-16B-1 et seq.) Although the Gift Act does not apply to the District<sup>2</sup>, it nonetheless provides useful guidance on appropriate ethical standards for public employees. Gifts of District property are generally forbidden by the "Anti-donation" provisions of the State of New Mexico Constitution (Article IX, Section 14). Nothing in this Code of Conduct shall be construed to violate those provisions of law and the requirements of this Code of Conduct shall be deemed supplemental to, and more restrictive than, the existing legal requirements. For purposes of this policy a "Gift" shall have the definition and meaning set forth in the Gift Act but the District's limitation on gifts shall be \$100 rather than the \$250 set forth in the Gift Act.

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<sup>2</sup> See footnote 17 to the Attorney General's Governmental Conduct Act Compliance Guide.

- 15.1 Employees must not accept or permit any member of their immediate family or household to accept any gifts or favors from anyone in exchange for promised performance of an official act.
- 15.2 Employees shall not accept any gratuity offered for performance of existing job duties including honoraria<sup>3</sup> for job related presentations, tips for District services, or any other form of compensation excepting only compensation for meals, lodging or travel expenses incurred for District related activities.
- 15.3 Subordinate Employees are prohibited from making any gift or gifts to any supervisory Employee that exceed \$100.00 in value in any single calendar year and are expressly prohibited from making a gift of any value to any supervisor that would create an appearance of impropriety including but not limited to gifts intended to secure favorable reviews, evaluations, promotions, or other conditions of employment.
- 15.4 Employees are prohibited from donating or making gifts of District property to private entities or individuals.
- 15.5 District Employees are prohibited from granting favors to any vendor, contractor, or customer of the NCRTD where the favor would result in a significant cost or expense to the District or would result in unequal treatment of similarly situated vendors, contractors, or customers.
- 15.6 District Employees, or their family members are prohibited from accepting gifts exceeding \$100.00 in value from a "restricted donor" as that term is defined in the Gift Act.
- 15.7 Prohibited gifts do not include gifts by Employees to food drives, charitable organizations or other similar fund raising activities so long as the gifts do not incur a cost or expense to the District. Nothing herein shall be deemed to amend or alter any District policy regarding solicitations in the workplace.
- 15.8 Prohibited gifts do not include any reward or incentive given to an Employee by the NCRTD as an employer.
- 15.9 Prohibited gifts include soliciting gifts for a charity from a business or corporation in a manner that appears that the purpose of the donor in making the gift is to influence the District's Officers or employees in the performance of their official duties. (See, NMSA 1978, Section 10-16B-3 (C)).
- 15.10 Prohibited gifts do not include gifts by and between district Employees in recognition of birthdays, holidays or for non-work related reasons.
- 15.11 Prohibited gifts do not include promotional materials given to persons attending a conference or training on behalf of the District.
- 15.12 Prohibited gifts do not include payment for another Employee's meal by a co-worker.
- 15.13 Prohibited gifts do not include meals permitted from financial services companies that are expressly exempted under NMSA 1978, Section 10-16-13.3 (C ).
- 15.14 Prohibited gifts do not include awards or other forms of recognition by or to the District or its Employees that are strictly commemorative and do not include cash or payments of any kind.

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<sup>3</sup> The GCA (NMSA 1978, Section 10-16-4.1) expressly limits honoraria to \$100.00 but the subsequent guidance interpreting Article XX, Section 9 of the New Mexico Constitution as prohibiting all additional compensation may apply. Also, Article IV, Section 27 of the constitution may be interpreted as prohibiting any increased compensation to a public servant for services rendered.

## **16.0 Board Conflicts of Interest:**

A Board Member Conflict of Interest shall mean any situation governed and regulated by NMSA 1978, Section 73-25-5 (E) that reads as follows:

"A director of the board shall not vote on an issue when the director has a conflict of interest. A director of the board, Officer of the board or Employee of the board shall not:

- 16.1 acquire a financial interest in a new or existing business venture or business property of any kind when he believes or has reason to believe that the new financial interest will be directly affected by his official act;
- 16.2 use confidential information acquired by virtue of his office or employment for his or another's private gain; or
- 16.3 contract with the district without public notice and competitive bidding and full disclosure of his financial or other interest in the business that is party to the contract."

Board conflicts of interest shall be addressed and disclosed pursuant to 9.08 of the Board's Bylaws and by annual compliance through the filing of a Conflict of Interest disclosure form a copy of which is attached Hereto as Exhibit A.

## **17.0 Employee Conflicts of Interest/Appearance of Impropriety Standard:**

Conflict of interest is difficult to define. The legal definition of conflict of interest, is very specific and covers relatively few situations. Most conflicts fall into a gray area where ethics and public perception are more relevant than statutes or precedents. Conflict of interest arises whenever the personal or professional interests of an Employee are potentially at odds with the best interests of the organization. Transactions that may constitute a conflict of interest are nevertheless acceptable if they benefit the organization and if approved by the Board or the Executive Director in an objective and informed manner. Conversely, even if an action or transaction is legal it may still be improper if action or transaction is vulnerable to legal challenges and public misunderstanding. Loss of public confidence and a damaged reputation are to be avoided even where the action or transaction is legal because public confidence is important to the District. Therefore, it is the policy of the District to avoid even the appearance of impropriety and full disclosure of real or potential conflicts of interest is required of all Employees. Specific limitations on conflicts of interest include the following:

- 17.1 Employees shall not take any official act for the primary purpose of enhancing their financial interest or financial position.
- 17.2 Employees are responsible for identifying there own actual or potential conflicts of interest and shall not participate in decisions or official actions directly affecting their financial interests.
- 17.3 Employees shall not engage in any other employment or activity that creates a conflict of interest, interferes with their duties to the public, compromises their ability to discharge effectively their duties, or otherwise adversely affects the performance of their duties.
- 17.4 Former Employees shall not represent a person in dealings with the District on a matter in which the former Employee participated personally and substantially.

## **18.0 Political Activity:**

- 18.1 Employees of the District shall not solicit any contribution of funds, goods or services in aid of any

political campaign while on District property. Employees shall also refrain from using any District property, information obtained through District employment or service and any other District resources in aid of any political campaign. Nothing herein shall prohibit the District, and its Employees from providing information regarding ballot issues involving the District.

- 18.2 Employees shall refrain from any action that expressly or impliedly compels other District Employees to support a candidate or to contribute goods, money or services to a political fund or effort including but not limited to union related associations and activities. For purposes of this Policy a request to sign a nominating petition or similar requests for aid in a political campaign shall be prohibited upon District Property. Voluntary participation in any political activity including but not limited to union membership and contribution to or payment of union dues, fees and contributions shall be permitted and appropriately documented.
- 18.3 Employees may run for elected office to the extent permitted by state and federal laws including but not limited to the Hatch Act and the District's Personnel Rules.
- 18.4 District Employees shall refrain from dissemination of partisan media while in the workplace.
- 18.5 Political activity by Employees that is in aid of the District and is authorized and approved by the Board is expressly permitted. However, any such political activity shall be subject to the direction and prescription of the Board and the Executive Director. District Employees shall refrain from engaging in lobbying or other political activities on behalf of the District unless they are expressly authorized and directed to take such actions.
- 18.6 Because the District receives substantial federal funding the District's Officers and Employees may be deemed to fall under the coverage of 5 U.S.C. Section 1501 to 1508 commonly known as the "Hatch Act." The Hatch Act covers government employees whose principal employment is in connection with an activity which is financed in whole or part by federal loans or grants. The Hatch Act restricts or prohibits covered employees from interfering with or affecting the result of an election by using their official authority or influence, soliciting political contributions from public employees, and running for office. All Employees of the District are charged with determining for themselves the application of the Hatch Act to their activities and complying with the law.

#### **19.0 Solicitations:**

Non-political solicitations by Employees of the District on behalf of the District are permitted to the extent authorized by the Board or the Executive Director. Non-political solicitations of Employees by other Employees for charitable organizations shall be permitted only to the extent authorized by the Executive Director and shall not be permitted where the solicitation identifies specific individuals and singles them out in front of their peers in a manner which compels participation or causes express or implied pressure to donate to a cause, charity or fund.

#### **20.0 Travel:**

Travel paid for by the District shall be scheduled and conducted in a manner that optimizes the benefits to the District. Officers and Employees shall refrain from conduct that creates the appearance of a lack of professionalism when on District travel. Such conduct includes unruly behavior, public intoxication, improper or unprofessional dress or appearance and any other inappropriate conduct that reflects poorly upon the District.

#### **21.0 Confidentiality:**

All District Business is public business and the District's Employees shall strive to optimize transparency in the

performance of District work to the maximum extent practicable. Notwithstanding the District's commitment to open and transparent government, it remains essential that certain aspects of public employment and public service be performed in a manner that respects the confidential information and privacy of individuals and mitigates the risk to tax-payer assets caused by disclosure of confidential information. Confidential information includes all personal identification information that might be used for identity theft, all attorney-client privileged communications, all proprietary information of third-party vendors, portions of disciplinary personnel actions, all Employee evaluations and such financial information as may be deemed confidential under New Mexico law.

It is the responsibility of all Employees to maintain confidentiality of confidential information and the disclosure of such information to the public, the press, or the community at large is prohibited.

#### **22.0 Accuracy of Books, Records and Reports:**

It is incumbent upon all District Employees to ensure that the records, reports and District data is maintained in a current format and accurately reflects the facts regarding the business and operations of the District. All District Employees are required to cooperate with any internal or external auditor, compliance Officers, regulators and other agencies who have regulatory authority over the District. Affirmative disclosure is required for any fact or information that is likely to materially alter a review of the District's finances and operations. Destruction and alteration of District records shall be performed only to the extent permitted by the District's Record Retention and Disposition policies. Alteration of draft documents or dynamic records such as databases, route maps and iterative documents is permitted as necessary but District records shall not be altered or amended in a manner that omits or elides material facts about the District.

#### **23.0 Outside Employment:**

Pursuant to the Governmental Conduct Act, all Employees of the District are charge with duties as trustees of the public's resources. As public trustees the Employees shall only use the powers and resources of public office and employment to advance the public interest and shall not obtain personal benefits or pursue private interests using District resources.

- 23.1 All outside employment by District Employees shall be reported to the Executive Director consistent with the District's Personnel Rules.
- 23.2 All outside employment by District Officers shall be reported to the Board to the extent that the employment may create a conflict of interest.
- 23.3 Outside employment by Employees that requires the Employee to respond to phone calls, texts, or other forms of communication during their regular work hours at the District is prohibited.
- 23.4 Outside employment that creates scheduling conflicts or unreasonably limits the availability of District Employees during hours when they can reasonably be expected to be available for District business or operations is prohibited.
- 23.5 Outside activity by District Employees, whether as an Employee, contractor or a volunteer, that seeks to obtain goods, services, grants, or other aid from the District for a third party (and not the general public) is prohibited.

#### **24.0 Hiring and Contracting Employees and Officers:**

The District may consider applications from existing and former Officers but shall not hire as an Employee any sitting Board Member. Board Members may volunteer pursuant to the District's Personnel Rules. The District

may contract with former Employees and Officers to the extent that said contract is in the District's best interest as determined by the Board provided that:

- 24.1 The former Officer or Employee has no actual or apparent conflict of interest;
- 24.2 The contract is disclosed to the Board;
- 24.3 The Former Officer or Employee does not receive a direct financial benefit from prior actions taken in their capacity as an Officer or Employee of the District.

**25.0 Reporting Violations:**

All Employees shall report violations of this policy to the Executive Director or the Board.

**26.0 Retaliation Prohibited:**

It shall be deemed a violation of this policy for any Employee of the District to retaliate against another Employee for reporting or alleging a violation of this policy.

**27.0 Sanctions:**

Employees may be sanctioned for a violation of this policy pursuant to the relevant provisions of the District Personnel Rules or any applicable Collective Bargaining Agreement.

(c) Training Plan/Record Keeping Policy and Procedures  
**See next pages.**



**North Central Regional Transit District (NCRTD)  
Resolution No. 2012-17**

**ADOPTION OF AN AMENDED NCRTD RECORDS AND  
EMAIL RETENTION POLICY**

**WHEREAS**, the records of the North Central Regional Transit District (NCRTD) are important assets and include essentially all records the NCRTD produces, whether paper or electronic; and

**WHEREAS**, the law requires the NCRTD to maintain certain types of records, usually for a specified period of time and failure to retain those records for those minimum periods would be improper and could subject the NCRTD to spoliation of evidence claims or civil liability; and

**WHEREAS**, the NCRTD on November 4, 2011 adopted Resolution No. 2011-13 establishing a Records and Email Retention Policy and Disposition Schedule; and

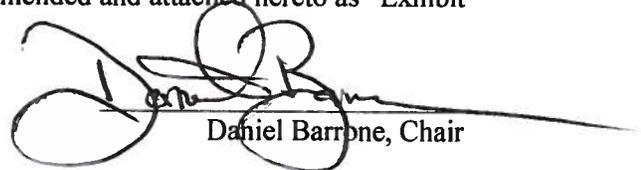
**WHEREAS**, the Federal Transit Administration (FTA) in their Financial Management Overview found the NCRTD Records and Email Retention Policy to be incomplete in regards to specific language pertaining to Accounting Records; and

**WHEREAS**, the NCRTD wishes to incorporate the FTA comments as addressed in the Records Retention and Disposition Schedule, Appendix A, page 7, item 8, "Accounting Records"; and

**WHEREAS**, the NCRTD wants to add an additional category regarding "Aboveground Storage Tank Facility Files" to the Records Retention and Disposition Schedule, Appendix A, page 11, item 23; and

**WHEREAS**, the NCRTD desires to implement and move forward with an updated and amended policy.

**NOW THEREFORE BE IT RESOLVED BY THE NCRTD BOARD THAT**, the NCRTD Records and Email Retention Policy is approved and adopted as amended and attached hereto as "Exhibit A" on this 3rd day of August 2012.

  
Daniel Barrone, Chair

Approved as to form:

  
Peter Dwyer, Counsel

## **Exhibit A**

### **NORTH CENTRAL REGIONAL TRANSIT DISTRICT**

#### **RECORDS AND EMAIL RETENTION POLICY AND DISPOSITION SCHEDULE**

##### **1.0 Objective**

To establish a records retention schedule for the orderly management and retirement of records necessary for carrying out the Public Records Act.

The records of The North Central Regional Transit District ("NCRTD") are important assets. Records include essentially all records the NCRTD produces, whether paper or electronic. A record may be as obvious as a memorandum, an email, a contract or a case study, or something not as obvious, such as a computerized desk calendar, an appointment book or an expense record.

The law requires the NCRTD to maintain certain types of records, usually for a specified period of time. Failure to retain those records for those minimum periods could subject the NCRTD to liability.

##### **2.0 Applicable Staff**

The NCRTD expects all employees to fully comply with any published records retention or destruction policies and schedules including the retention and disposition schedule module incorporated as part of this policy, provided that all employees should note the following general exception to any stated destruction schedule: If you believe, or the NCRTD informs you, that NCRTD records are relevant to litigation, or potential litigation (i.e., a dispute that could result in litigation), then you must preserve those records until Legal Counsel determines the records are no longer needed. That exception supersedes any previously or subsequently established destruction schedule for those records. If you believe that exception may apply, or have any question regarding the possible applicability of that exception, please contact the Executive Director.

Failure to comply with this Document Retention Policy may result in an action against an employee, including suspension or termination. Questions about this policy should be referred to the Executive Director of the NCRTD, who is responsible for enforcing and directing the administration and updating of this policy.

### **3.0 Reference to Future Compliance**

From time to time the NCRTD will establish, maintain or supplement retention or destruction policies or schedules for specific categories of records in order to ensure compliance, and also to accomplish other objectives, such as preserving intellectual property and cost management. Several categories of documents that bear special consideration are identified below; also incorporated is a retention and disposition schedule modeling the schedule provided by the NM Commission of Public Records, Department of Transportation Executive Records Retention and Disposition Schedules (ERRDS). While minimum retention periods are suggested, the retention of the documents identified below and of documents not included in the identified categories should be determined primarily by the application of the general guidelines affecting document retention within this document.

### **4.0 Definitions**

- A. "Administrator" means the NCRTD records administrator
- B. "Agency" and/or "District" means the NCRTD
- C. "Archives" means the NCRTD archives.
- D. "Disadvantaged business" means a for-profit small business that is at least 51 percent owned by one or more individuals who are both socially and economically disadvantaged or, in the case of a corporation, in which 51 percent of the stock is owned by one or more such individuals; and whose management and daily business operation are controlled by one or more of the socially and economically disadvantaged individuals who own it.
- E. "Disposition" means final action that puts into effect the results of an appraisal decision for a series of records (i.e., transfer to archives or destruction).
- F. "Electronic document management system" means a system that manages electronic documents contained in an information technology system, using computer equipment and software to manage, control, locate, and retrieve information in the electronic system.
- G. "Let or Letting" means the process of preparing bid for release on NCRTD construction projects.
- H. "Non-record" means extra copies of documents kept solely for convenience of reference, stocks of publications, records not usually included within the scope of the official records of the NCRTD, and library material intended only for reference or exhibition. The following specific types of materials are non-records: materials neither made nor received in pursuance of statutory requirements nor in

connection with the functional responsibility of the officer of the NCRTD; extra copies of correspondence; preliminary drafts; blank forms, transmittal letters or forms that do not add information; sample letters; and reading file or informational files.

- I. "Public record" means all books, papers, maps, photographs or other documentary materials, regardless of physical form or characteristics, made or received by the NCRTD in pursuance of law or in connection with the transaction of public business and preserved, or appropriate for preservation, by the agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations or other activities of the government, or because of the informational and historical value of data contained therein.
- J. "Records custodian" means the statutory head of the agency using or maintaining the records or the custodian's designee.
- K. "Records management" means the systematic control of all records from creation or receipt through processing, distribution, maintenance and retrieval, to their ultimate disposition.
- L. "Records retention and disposition schedule" means rules adopted by the NCRTD Board of Directors describing records of an agency, establishing a timetable for their life cycle and providing authorization for their disposition.
- M. "Retention" means the period of time during which records must be maintained by an organization because they are needed for operational, legal, fiscal, historical or other purposes.

#### ABBREVIATIONS AND ACRONYMS:

- ~~A.~~ "ARC" stands for accident, records, citation
- ~~AB.~~ "ADA" stands for Americans With Disabilities Act
- ~~C.~~ "CRR" stands for certified return receipt
- ~~BD.~~ "DOT" stands for Department of Transportation
- ~~E.~~ "EMS" stands for emergency medical service
- ~~CF.~~ "FSR" Financial Status Report
- ~~D~~ "FTA" Federal Transit Administration
- ~~G.~~ "GPS" stands for global positioning system
- ~~H.~~ "HUD" stands for housing and urban development
- ~~I.~~ "MPO" stands for metropolitan planning organization.
- ~~J.~~ "MVD" stands for motor vehicle division
- ~~K.~~ "NCIC" stands for national crime information center
- ~~L.~~ "NMAC" stands for New Mexico administrative code.
- ~~EM.~~ "NMSA" stands for New Mexico statutes annotated
- ~~N.~~ "RPO" stands for rural planning organization.
- ~~O.~~ "TRADAS" stands for traffic data analysis system.
- ~~FP.~~ "US" stands for United States

## 5.0 Instructions

- A. For records of a general administrative nature, financial nature, personnel nature and medical nature refer to "Appendix A" labeled "Records Retention and Disposition Schedule."
- B. Retention periods shall be extended until six months after all current or pending litigation; current claims, audit exceptions or court orders involving a record have been resolved or concluded.
- F. The descriptions of files are intended to be evocative, not complete. For example, there will always be some documents that are filed in a file that are not listed in the description, and similarly, not every file will contain an example of each document listed in the description.
- G. Confidentiality is denoted for files likely to contain confidential materials, but files without a confidentiality note nonetheless may contain confidential or privileged materials, and failure to include an express confidentiality note in the description of a file does not waive the confidential or privileged nature of those materials. Some or all materials in a file may be confidential. Refer questions concerning the confidentiality of a file or portions of a file to legal counsel for the agency.
- H. Access to confidential documents or confidential files shall be only by authorization of the NCRTD Executive Director or attorney general or by court order, unless otherwise provided by law. Release of confidential documents to law enforcement and other government agencies shall only be upon specific statutory authorization subpoena or court order. Nothing herein shall prohibit duly designated NCRTD personnel from performing their job functions including the review of personnel files and other confidential records where such review is necessary to perform a job duty.
- I. Records, papers or documents may be photographed, microfilmed, micro-photographed or reproduced on film. Such photographs, microfilm, photographic film or microphotographs shall be deemed to be an original record for all purposes, including introduction in evidence in all courts or administrative agencies
- J. Public records placed on magnetic tapes, disks or other data processing media shall be retained for the length of time specified in "Appendix A of the Records Retention and Disposition Schedules" and are subject to the same confidentiality and access restrictions as paper records.
- K. Appendix A, North Central Regional Transit District ("NCRTD") Records Retention and Disposition Schedule, and Appendix B, North Central Regional Transit District ("NCRTD") Email and Email Retention and Disposition Policy are incorporated herein

## Appendix A

### **North Central Regional Transit District (“NCRTD”) Records Retention and Disposition Schedule**

#### **1.) ELECTRONIC DOCUMENT MANAGEMENT SYSTEM:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: document management system that stores images and electronic records produced by the NCRTD. Data may include payroll and personnel data, contracts and agreement data, project files, environment reference files, etc.
- D. Data retention:
  - (1) Metadata: until related records are destroyed.
  - (2) Federal reports: 10 years after close of calendar year in which report is created.
  - (3) Local government project files: permanent, transfer to archives 25 years after project completion.
  - (4) District maintenance project files: permanent, transfer to archives 25 years after project completion.
  - (5) Request for property abandonment files: permanent, transfer to archives 25 years after date of request.
  - (6) Abandonment document forms: permanent, transfer to archives 25 years after abandonment filed.
  - (7) Encroachment files: 30 years after final disposition of encroachment, then transfer to archives for review and final disposition.
  - (8) Property sales files: permanent, transfer to archives 25 years after date of sale.
  - (9) Disclaimer files: five years after date property is disclaimed, transfer to archives for review and final disposition.
  - (10) Contract award recommendations files: six years after project completion date.
  - (11) Payroll records: 10 years after end of federal fiscal year in which created.
  - (12) Accident reports: seven years after end of federal fiscal year in which created.
- E. Output: Because the electronic document management system is a data-based system, ad hoc and regularly scheduled reports may be generated upon request or demand. When produced, these reports are forwarded to the requesting entity.

#### **2.) FEDERAL PLANNING REPORTS:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]

- C. Description: reports containing various federally-mandated information. Some of these reports may include performance monitoring system report, monthly volume summary reports, monthly and quarterly audit reports,
- D. Retention: 10 years after close of calendar year in which created

3.) **FEDERAL AND STATE APPORTIONMENTS REPORTS FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: reports concerning obligated federal and state funds for various transit related projects (i.e., construction, planning programs, feasibility studies, consultants, etc.).
- D. Retention: five years after end of federal fiscal year in which created

4.) **DAMAGE CLAIM FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: damage claims submitted by the NCRTD to individuals or representatives of individuals that have negligently damaged NCRTD property. File may include police reports, estimate of damage, cost reports, final demand notices, receipt of payments, correspondence, etc.
- D. Retention: three years after final disposition

5.) **INTERNET SITE VISIT MONITORING REPORTS:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: monthly report, if any showing NCRTD employee internet visits to both agency permitted and agency blocked internet addresses. Report may include NCRTD employee name, date, time, source, destination, internet protocol address, protocol, category, etc.
- D. Retention: six months after report created

6.) **ACCIDENT FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning accidents involving any NCRTD Bus and Driver File may include copies of accident reports, medical information, annual summary of accident information,
- D. Retention: 10 years after date of accident, then transfer to archives for review and final disposition

- E. Confidentiality: Portions of record may be considered confidential pursuant, but not limited to 5 USC, Section 552a and 42 U.S.C. § 405(c)(2)(C)(viii)(I). (i.e., social security number), Section 14-6-1 NMSA 1978 (i.e., health information) and Section 14-2-1 NMSA 1978 (i.e., "law enforcement records that reveal confidential sources, methods, information or individuals accused but not charged with a crime").

7.) **ACCIDENT RECORDS CITATION SYSTEM:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: database or other records maintenance system that maintains accident report information for statistical purposes. Data may include personal identifiers of individuals involved in an accident (i.e., name, social security number, address, license number, age, etc.), location of accident, accident detailed information, etc.
- D. Data retention: seven years after end of federal fiscal year in which created
- E. Confidentiality: Portions of record may be confidential pursuant, but not limited to 5 USC, Section 552a (i.e., social security number), Section 66-7-508 NMSA 1978 Confidentiality of records, Section 29-10-4 NMSA 1978 (i.e., arrest records) and Section 14-2-1 NMSA 1978 (i.e., "law enforcement records that reveal confidential sources, methods, information or individuals accused but not charged with a crime").
- F. Input: All records used as input for the accident records citation system are destroyed once input to system is verified and complete.

8.) **ACCOUNTING RECORDS**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records must be maintained that adequately identify the source and application of funds provided through Federal and State grants and subgrants for financially-assisted activities. These records must contain information pertaining to grant or subgrant awards and authorizations, obligations, unobligated balances, assets, liabilities, outlays or expenditures and income.
- D. Retention: Except as otherwise specified, records must be retained for three years from the starting date.  
Starting date of retention period:
  - (1) General Records. The starting date for retention of records related to multi-year projects is the date of submission of the final FSR upon project completion or, if waived, the date it would have been due.
  - (2) Equipment Records. The three year retention period for equipment records starts from the date of the equipment's disposition or replacement or transfer at FIA's direction.

**9.) BID LETTING AND AWARD SYSTEM:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: database or other method of record retention that captures letting, bidding and award information for NCRTD projects. Data may include contractor bids for a specific project, advertising documentation, district office recommendations for award, authorization from a federal administration, bid reviews, preliminary award of contract, project estimates, cost list, items list to generate proposals for contractors, bid letting information, data used to analyze bids, etc.
- D. Data retention: six years after project completion date
- E. Confidentiality: Portions of this file may contain confidential information pursuant, but not limited to Section 13-1-122 NMSA 1978 (i.e., Competitive sealed qualifications-based proposals; award of architect, engineering, landscape architect and surveying contracts) and CFR 40 Subsection 53.15 (i.e., trade secrets and confidential or privileged information).

**10.) AUTHORIZATION FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning authorization for project advertising and letting requirements that are going to be let in a given month. Files may include letting schedule, licensing requirements, project information work sheet, invitation for bid, addendum to projects, preliminary design plans, work sheet for working days, disadvantaged business goal, and certifications from appropriate in-house offices, etc.
- D. Retention: six years after project completion date
- E. Confidentiality: Portions of this file may contain confidential information pursuant, but not limited to Section 13-1-122 NMSA 1978 (i.e., Competitive sealed qualifications-based proposals; award of architect, engineering, landscape architect and surveying contracts) and CFR 40 Subsection 53.15 (i.e., trade secrets and confidential or privileged information).

**11.) CONTRACT AWARD RECOMMENDATIONS FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning recommendations and award information from the DOT bid review committee to award a contract to a particular bidder. Files may include advertising documentation, recommendations for award, authorization from federal highway administration, DOT contract goal for disadvantaged business in highway construction, bid review work sheets, bid tabulations, copy of preliminary award of contract letter, etc.
- D. Retention: six years after project completion date

- E. Confidentiality: Portions of this file may contain confidential information pursuant, but not limited to Section 13-1-122 NMSA 1978 (i.e., Competitive sealed qualifications-based proposals; award of architect, engineering, landscape architect and surveying contracts) and CFR 40 Subsection 53.15 (i.e., trade secrets and confidential or privileged information).

**12.) SITE MANAGEMENT SYSTEM:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: system that tracks and maintains information for all aspects of construction management. Data may include construction contract data, daily diaries, change orders, contractor payments, finalization, disputes, claims, materials used, etc.
- D. Retention: six years after project completion date

**13.) CALLED IN LOAD LOG:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: log used to record the overload permits issued by the department of public safety to travel on state bridges. Log may show date, load number, requester, time, firm name, load type, gross weight, height, width, length, axle number, weight, distance, origin, truck unit number, destination, number of axles, route numbers, remarks, rejected, notified, etc.
- D. Retention: three years after close of calendar year in which created

**14.) REQUEST FOR PROPERTY ABANDONMENT FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning NCRTD's recommendations and decisions regarding incoming requests from entities on properties owned and abandoned by NCRTD. File may include right of way maps showing parcels of land, copy of associated easement, survey of intended abandonment, legal land description, interdepartmental comments and recommendations for or against abandonment, declaration of vacation and abandonment, etc.
- D. Retention: permanent, transfer to archives 25 years after date of request

**15.) ABANDONMENT DOCUMENT FORMS:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: form that documents property abandonment
- D. Retention: permanent, transfer to archives 25 years after abandonment filed

**16.) ENCROACHMENT FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning encroachments onto NCRTD property. Files may include surveys, copies of deeds, contracts, notice of encroachment on highway right of way, license for encroachment, correspondence, etc.
- D. Retention:
  - (1) Structural encroachment files: 25 years after final disposition of encroachment, then transfer to archives for review and final disposition
  - (2) All others: transfer to archives 25 years after disposition of encroachment for review and final disposition

**17.) PROPERTY SALES FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning the sale of NCRTD property. Files may include right of way maps, quitclaim deeds, correspondence, etc.
- D. Retention: permanent, transfer to archives 25 years after date of sale

**18.) DISCLAIMER FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning the NCRTD disclaimer of interest or ownership of specific property. Files may include right of way maps, disclaimer, correspondence, etc.
- D. Retention: five years after date property is disclaimed, transfer to archives for review and final disposition

**19.) AIRSPACE FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning the leasing of the NCRTD right of way airspace. File may include lease agreements, right of way maps, correspondence, etc.
- D. Retention: six years after termination of lease agreement

**20.) BILLBOARD OWNER PERMIT FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning the approved issuance of permits to erect or maintain outdoor advertising along the city, county, interstate and other federally funded primary highways. File may include application for permit, inspection

documentation of proposed advertising location, check copies, billing information, plats, local government permit copy, renewal notice copy, copy of permit plates issued, correspondence, etc.

D. Retention:

(1) Approved permit: permanent, transfer to archives 25 years after termination of permit

(2) Rejected application: five years after date of rejection

21.) **CULTURAL RESOURCE REPORT FILES:**

A. Program: NCRTD records custodian

B. Maintenance System: [NCRTD preference]

C. Description: records concerning investigation and assessments conducted to determine any historic or archeological site issues affecting proposed or existing NCRTD properties or rights of way. Files may include site investigation report, surveys, clearance letter, denial letter, correspondence, etc.

D. Retention: permanent, transfer to archives 25 years after date of letter of clearance or denial

E. Confidentiality: Portions of record may be confidential pursuant, but not limited to Section 18-6-11.1 NMSA 1978, Confidentiality of site location.

22.) **ENVIRONMENTAL REFERENCE FILES:**

A. Program: NCRTD records custodian

B. Maintenance System: [NCRTD preference]

C. Description: environmental assessments conducted on NCRTD properties and potential property acquisitions. Files may include site investigation reports (i.e., detailed site investigation, field notes, drill logs, laboratory results, disposal manifest, etc.), hazardous materials assessments, photos, clean up report, correspondence, etc.

D. Retention: permanent, transfer to archives 25 years after file assessment conducted

23.) **ABOVEGROUND STORAGE TANK FACILITY FILES**

A. Program: NCRTD records custodian

B. Maintenance System: [NCRTD preference]

C. Description: Records concerning the design and construction, maintenance, inspection, repair and removal of aboveground storage tanks located on the grounds of any NCRTD property. Files may include contracts for removal, work plans and approvals, photos, authorizations to work, correspondence, etc.

D. Retention: seven years after facility is closed or tank is removed

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24.) **UNDERGROUND STORAGE TANK FACILITY FILES:**

A. Program: NCRTD records custodian

- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning the maintenance, inspection and removal of underground storage tanks located on the grounds of any NCRTD property. Files may include contracts for removal, work plans and approvals, photos, authorizations to work, correspondence, etc.
- D. Retention: permanent, transfer to archives 25 years after date storage tank removed

**25.) LABORATORY INFORMATION MANAGEMENT SYSTEM:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: database or any records retention method that maintains information regarding the testing of materials used for maintenance and construction projects. Data may include test sample name, lab number, project number, hours worked, materials used, maintenance activity, date reported, district number, test, date sampled, nature of source, location of source, date received, test results, identifiable marks, manufactured by, district number, refinery source, weekly asphalt report number, tested by, approved by, etc.
- D. Data retention: permanent

**26.) PRODUCT EVALUATION DATABASE:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: database or any records retention method that maintains information on products available for construction projects. Data may include product name, evaluation of product, approved date and status, product specifications, representative name and demographic information, comments, etc.
- D. Data retention: until product is no longer approved or use is discontinued

**27.) PRODUCT FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning approved products available for construction projects. Files may include application for product evaluation, data sheet on use of product, product specifications, material safety sheets, correspondence, etc.
- D. Retention:
  - (1) Approved products: 20 years after product evaluation approved
  - (2) Rejected products: three years from date of rejection

**28.) EQUIPMENT MANAGEMENT SYSTEM:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]

- C. Description: database or any records retention method that maintains information on all heavy equipment and fleet vehicles. Data may include district information, class unit, item number, contract number, vendor, base price, options to be ordered, total cost, date paid, budget balance, warranties, serial number, dealer name, body style, fuel type, shipping weight, vehicle description, activity code, mileage (beginning and end), daily miles, project code, account code, part number, labor, parts (i.e., task code, part number, vendor, quantity, unit price and part description, etc.), fixed assets number, inventory value, mile or hour readings, servicing information, inspections, book value, resale value, etc.
- D. Data retention: two years after date of disposition of heavy equipment or vehicle
- E. Input: All records used as input for the equipment management system are filed in fixed asset (equipment) acquisition history files

**29.) EQUIPMENT MAINTENANCE FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: complete service and maintenance history on heavy equipment and vehicles. Files may include equipment inspection report, equipment registration, equipment transfer form, change report, preventative maintenance report, inspection condemnation report, certificate of property loss, equipment usage report, copy of authorization to purchase surplus equipment, copy of verification of public entity funds for purchase of surplus equipment, etc.
- D. Retention: two years after date of disposition of heavy equipment or vehicle

**30.) PUBLIC ENTITY BUDGET AUTHORIZATION FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records relating to purchase of NCRTD equipment by public entities. Files may include authorization to purchase surplus equipment, verification of public entity funds for purchase of surplus equipment form, copy of memo of charge, request for waiver, hardship analysis report from department of finance and administration, correspondence, etc.
- D. Retention: three years after close of fiscal year in which authorization received

**31.) AUCTION DATABASE:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: database maintains or records maintenance system containing information pertaining to the auction of NCRTD equipment. Data may include inventory lot number, description, fixed asset number, serial number, meter reading, location, inspection and condemnation number, transfer number, bid number, bid amount, bidder name, bidder address, etc.
- D. Data retention: five fiscal years after date in which sale occurred

**32.) AUCTIONEER REPORT FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: report listing all equipment sold at auction. File may include equipment acquisition packet (i.e., dealer name, registration, equipment inspection report, etc.) and disposal packet ( i.e., inventory lot, description, fixed asset number, serial number, meter reading, location, inspection and condemnation number, transfer number, bid number, bid amount, sold with, bidder name, bidder address, transfer title request, etc.), copy of memo of charge, etc.
- D. Retention: five fiscal years after date of sale

**33.) FACILITY INSPECTION FILES:**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: routine inspections of the department facilities. Files may include inspection reports, cover letter to supervisor of facility, listing of areas inspected, discrepancies noted, response from supervisor on corrective action, correspondence, etc.
- D. Retention: five years after date of inspection

**34.) SAFETY RESEARCH FILES (STUDIES):**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning research conducted on safety issues (i.e., workplace violence, safety vests, safety processes, etc.). File may include study, employee safety analysis, notes, etc.
- D. Retention: 10 years after research is completed

**35.) RESOLUTION FILES**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: formal statements expressing the opinion, will, or intent of the NCRTD governing body.
- D. Retention: permanent

**36.) CAPITAL PROJECT FILES**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning the use of capital funds. Records document the progress and completion of capital projects (e.g., construction, redesigning, renovation, remodeling of NCRTD structures, streets, utility lines, etc.). Files may contain bid or quote documentation, contracts, payroll documentation,

expenditure reports, blueprints, architectural drawings, soil tests or analyses, engineering specification, payment documentation, etc.

D. Retention:

(1) Fiscal or contractual documents (e.g., bids, quotes, agreements, contracts, etc.): 10 years after completion of project

(2) Technical documents (e.g. blueprints, architectural drawings, soil tests or analyses, engineering specifications, etc.): permanent

(3) All other documents: two years after close of fiscal year in which project completed

**37.) NCRTD BONDS, NOTES, INTEREST COUPONS, AND CERTIFICATES OF INDEBTEDNESS**

A. Program: NCRTD records custodian

B. Maintenance System: [NCRTD preference]

C. Description: record of debt in form of a bond, note, certificate of indebtedness, or interest coupon incurred by the NCRTD.

D. Retention:

(1) When paying agent is a bank, savings and loan association, or other third party: until paid and certificate of destruction has been prepared

(2) When paying agent is the debtor agency (i.e., NCRTD): two years following payment and certificate of destruction has been prepared

**38.) INDUSTRIAL REVENUE BOND FILES**

A. Program: NCRTD records custodian

B. Maintenance System: [NCRTD preference]

C. Description: records concerning the issuance of NCRTD revenue bonds to acquire, own, lease, or sell projects for the purpose of promoting industry and trade other than retail trade. Files may include agreement for the abatement of taxes, project descriptions, industry or trade information, correspondence, memoranda, etc.

D. Retention: six years after termination of agreements

**39.) NCRTD BOND CERTIFICATE OF DESTRUCTION**

A. Program: NCRTD records custodian

B. Maintenance System: [NCRTD preference]

C. Description: shows the number and maturity of the bond, note, certificate, coupon, the date paid, etc.

D. Retention: six years after date created

**40.) NCRTD BOND REGISTER**

A. Program: NCRTD records custodian

B. Maintenance System: [NCRTD preference]

- C. Description: record of bonds or notes issued and paid. Register shows the bond or note issue numbers, amount of issue date bond or note canceled, coupon numbers, payment information, etc.
- D. Retention: 10 years after date of maturity

**41.) PETITION FILES**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning requests on a variety of issues (e.g., special election, ordinance change, traffic light installation, speed bump installation, etc.).
- D. Retention:
  - (1) All other petitions: one year after close of fiscal year in which received

**42.) ADA COMPLIANCE FILES**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning the Americans With Disabilities Act. File may contain ADA plan, policies, grievance procedures, grievances, resolutions, etc.
- D. Retention:
  - (1) Plans, policies, and procedures: until superseded or one year after affected grievances have been resolved
  - (2) Grievances and resolutions: one year after date closed[Note: Policies and plans adopted by ordinance or resolution.]

**43.) COLLECTIVE BARGAINING FILES**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning transactions with labor organizations representing employees in collective bargaining. Files may contain copy of certification of labor organization as the exclusive representative of employees, mediation documentation and recommendations, agreements, grievances and resolutions, decertification, correspondence, memoranda, etc.
- D. Retention:
  - (1) Agreements: six years after termination of agreement
  - (2) Grievances and resolutions: three years after date of resolution
  - (3) All other documentation: until no longer needed for reference

**44.) CLAIM OF LIEN FILES**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning liens placed against private property for services rendered by the NCRTD. Files may contain claim of lien, assessment table, copy

- of notice of public hearing, copy of notice of violation, court order, copy of work order, copy of billing, release of lien, correspondence, memoranda, etc.
- D. Retention: six years after close of fiscal year in which lien released

**45.) VEHICLE FILES**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning the history of NCRTD-owned or leased vehicles. Files may include purchase or lease information, warranty documentation, maintenance documentation, maintenance expenditure information, disposal information, etc.
- D. Retention: three years after disposition of vehicle

**46.) VEHICLE MAINTENANCE FILES**

- A. Program: motor pool records
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning the maintenance performed on NCRTD-owned vehicles. Files may include work orders, repair orders, work schedules, maintenance orders, maintenance schedules, work reports, etc.
- D. Retention: three years after close of fiscal year in which created

**47.) BUS ROUTE PLANNING FILE**

- A. Program: transportation and transit records
- B. Maintenance System: [NCRTD preference]
- C. Description: records used to establish and modify the NCRTD transit route system. File may include studies, maps, population surveys, schedule plans, route schedules, etc.
- D. Retention:
  - (1) Route schedules and maps: until superseded
  - (2) All other records: three years after close of calendar year in which created

**48.) CHARTER BUS FILES**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: records concerning charter rentals of transit system buses to private groups. Files may include rental information, fiscal documentation, related correspondence, etc.
- D. Retention: three years after close of fiscal year in which created

**49.) DAILY BUS PASSENGER REPORT**

- A. Program: transportation and transit records
- B. Maintenance System: [NCRD preference]
- C. Description: records concerning all NCRD buses, ~~including airport shuttle buses~~ per route in the NCRD transit system, used to summarize operational statistics for management review purposes. Report may show name of operator, number of regular fares, senior citizen fares, handicapped persons fares, etc.
- D. Retention: three years after close of fiscal year in which created

**50.) BUS DRIVERS DAILY CHECKLIST**

- A. Program: NCRD records custodian
- B. Maintenance System: [NCRD preference]
- C. Description: record concerning the condition and appearance of NCRD buses ~~including airport shuttle buses~~ used to identify maintenance problems on vehicles.
- D. Retention: three years after close of fiscal year in which created

**51.) TRANSIT OPERATION SUMMARY REPORTS**

- A. Program: NCRD records custodian
- B. Maintenance System: [NCRD preference]
- C. Description: reports documenting daily fares received. Reports may include monthly reports documenting ridership, revenue, route information, fuel usage, and other operational details.
- D. Retention: three years after close of fiscal year in which created

**52.) TAX RECORDS**

- A. Program: NCRD records custodian
- B. Maintenance System: [NCRD preference]
- C. Description: Include but may not be limited to, documents concerning payroll expenses, accounting procedures and regarding the NCRD's revenues.
- D. Retention: six years from the date of filing a return if applicable.

**53.) EMPLOYMENT RECORDS/PERSONNEL RECORDS**

- A. Program: NCRD records custodian
- B. Maintenance System: [NCRD preference]
- C. Description State and federal statutes require the NCRD to keep certain recruitment, employment and personnel information. The NCRD should also keep personnel files that reflect performance reviews and any complaints brought against the NCRD or individual employees under applicable state and federal statutes. The NCRD should also keep all final memoranda and correspondence reflecting performance reviews and actions taken by or against personnel in the employee's personnel file.
- D. Retention: six years

**54.) PRESS RELEASE/PUBLIC FILINGS**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: Permanent copies of all press releases and publicly filed documents should be retained under the theory that the NCRTD should have its own copy to test the accuracy of any document a member of the public can theoretically produce against the NCRTD.
- D. Retention: All in perpetuity

**55.) LEGAL FILES**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: Legal counsel should be consulted to determine the retention period of particular documents.
- D. Retention: should generally be maintained for a period of ten years.

**56.) MARKETING AND SALES DOCUMENTS**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: Copies of marketing and sales documents, invoices, contracts, leases, licenses and other legal documents
- D. Retention:
  - (1) Marketing and Sales Documents should be maintained for at least six years
  - (2) Sales invoices, contracts, leases, licenses and other legal documentation; Three years beyond the life of the agreement.

**57.) CONTRACTS**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: Final, execution copies of all contracts entered into by the NCRTD should be retained.
- D. Retention: three years beyond the life of an agreement, and longer in the case of publicly filed contracts.

**58.) EMAIL**

- A. Program: NCRTD records custodian
- B. Maintenance System: [NCRTD preference]
- C. Description: Email and Email Retention and Disposition is hereby incorporated as Appendix B, Email and Email Retention and Disposition Policy.
- D. Retention: printed in hard copy and kept in the appropriate file; or downloaded to a computer file and kept electronically or on disk as a separate file. The retention period depends upon the subject matter of the e-mail, as covered elsewhere in this policy.

## **Appendix B**

### **North Central Regional Transit District ("NCRTD") Email and Email Retention and Disposition Policy**

#### **Objective**

The purpose of this policy is to provide guidance to NCRTD employees in managing information sent or received through email transmissions and to ensure the proper use of the NCRTD email system.

#### **Applicable Staff**

All NCRTD employees

#### **Definitions**

**"Email"** means a message transmitted electronically over a communications network. A system that enables users to compose, transmit, receive and manage electronic messages and images across networks and through gateways connecting to other local area networks.

**"Electronic record"** means a computer-generated item such as an email message, a document file, an image file, etc.

**"Non-record"** means extra copies of documents kept solely for convenience of reference, stocks of publications, records not usually included within the scope of official records of an agency or government entity, personal correspondences that do not pertain to NCRTD business and library material intended only for reference or exhibition. The following specific types of materials are non-records: materials neither made nor received in pursuance of statutory requirements or in connection with the functional responsibility of the officer or agency; extra copies of correspondence; preliminary drafts; blank forms, transmittal letters or forms that do not add information; sample letters and reading or informational files.

**"Public records"** means all books, papers, maps, photographs or other documentary materials, regardless of physical form or characteristics, made or received by any agency in pursuance of law or in connection with the transaction of public business.

### **Policy Statement**

It is the policy of the NCRTD to provide employees email resources and services to assist them in the performance of their work. All email resources and services are to be managed in a lawful and effective manner. To assure this, the NCRTD has the right to monitor all aspects of the email system to ensure compliance with this policy and applicable law. Employees should not have the expectation of privacy in anything they create, send or receive on the NCRTD email system. Employees shall conduct themselves in a manner consistent with appropriate behavior standards as established in existing NCRTD policies. All NCRTD policies relating to intellectual property protection, privacy, misuse of NCRTD equipment, sexual harassment, sexually hostile work environment, data security and confidentiality shall apply to the use of email.

### **Public Records**

All email transmissions made or received by the NCRTD in pursuance of law or in connection with the transaction of business are public records. Employees shall determine if email transmissions, both "sent" and "received," are public records; separate "public records" from "non-records"; and store only that information that is a public record. Records shall be stored and retained based on the retention period for the particular records series established in records retention and disposition schedules and agency procedures.

Electronic documents, including email, are subject to the provisions of the Public Records Act and the Inspection of Public Records Act.

Destruction of a public record before its retention period has been met is illegal and is a fourth degree felony pursuant to Section 30-26-1 NMSA 1978, Tampering with Public Records.

### **Passwords**

All passwords upon request must be made known to the Executive Director, ~~and Financial Manager~~. The use of passwords to gain access to the email system or to secure specific files does not provide employees with an expectation of privacy in the respective system or document.

### **Encryption**

Employees may not encrypt any emails without obtaining written permission from their supervisor. If approved, the encryption key(s) must be made known to the agency's Executive Director.

### **Privacy and Access**

Subject to tribal sovereignty rights, email messages sent or received in conjunction with NCRTD business may be releasable to the public under the Inspection of Public Records Act with several exceptions such as medical records, letters of reference, matters of opinion, attorney-client information, trade secrets, tactical response information and law enforcement investigative files. Employees are prohibited from disclosing, copying, distributing or forwarding email messages exempted from public disclosure under state and federal laws.

### **Personal Use**

Personal email shall not impede the conduct of NCRTD business. Employees shall not subscribe to mailing lists or mail services that fall outside of the employees scope of work. Use of social media during working hours for non-work related purposes shall not impede the conduct of NCRTD business.

### **Questionable Email**

The NCRTD will provide employees with periodic Anti-Virus updates for personal computers. It is the employee's responsibility to update his or her assigned computer when notified. Employees shall not willfully and knowingly open email messages that look questionable nor shall they open attachments unless the user is certain that the attachment is from a known sender, is expected and is pertinent to the employee's job. Questionable emails and attachments are to be deleted immediately and then "double deleted" by emptying the Trash bin.

### **Unacceptable Use of Email**

Employees shall not use email resources and services for commercial purposes, including but not limited to, on-line trading and e-bay operations.

Employees shall not send or forward emails containing libelous, defamatory, offensive, racist or obscene remarks. If an employee receives an email of this nature, they must promptly notify their supervisor.

Employees shall not use email to conduct prohibited political activities or business activities related to the holding of public office.

Employees shall not establish user profiles or forward, import or create email accounts other than the profile and account established on their behalf by the NCRTD. Serious disciplinary action up to and including termination of employment may result from evidence of prohibited activity obtained through monitoring or inspection of electronic messages, files, or electronic storage devices. Illegal activity involving NCRTD IT resource usage may be referred to appropriate authorities for prosecution.

## 4. Operations Employees: Managers, Drivers, Mechanics and Dispatchers

(f) Titles and Job descriptions

**See next pages.**



# North Central Regional Transit District Job Description

<b>Title:</b>	Operations Director	<b>Code:</b>	300
<b>Division:</b>	Operations Administration	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	
<b>FLSA Status: Exempt</b>			

GENERAL PURPOSE

Provides a variety of **professional managerial and administrative duties** related to planning, organizing, directing and coordinating the day-to-day delivery of transportation services for fixed route, express, commuter, demand and para-transit services; including central dispatch/customer services and fleet and facility maintenance operations. Ensures efficient, safe and State and Federal compliant services to the public. This is an "At-Will" classification which means the Transit and Maintenance Operations Director serves at the will of the Executive Director and may be removed at any time without cause, notice, or right of appeal.

SUPERVISION RECEIVED

Works under the policy guidance and direction of the Executive Director.

SUPERVISION EXERCISED

Provides general supervision to the Fleet & Facilities Maintenance Manager, Transit Operations Manager, Transit Supervisor(s) and assigned support staff as needed.

ESSENTIAL FUNCTIONS

Manages, plans, coordinates, and evaluates the delivery of District-wide transportation services; oversees all supervisory personnel in transportation and maintenance to ensure the effective assigning, scheduling and dispatching of bus drivers and vehicles and maintenance of fleet and facilities; conducts special projects, performs analyses and develops plans as requested by Executive Director.

Develops and implements transportation service goals, objectives, policies, procedures and work plans; manages complex data analysis projects, oversees the maintenance of related records systems and databases for transportation delivery tracking and research purposes, and administers complex programs and assigned projects; oversees and monitors the tracking and recording of ridership on all routes as well as total annual ridership for monthly reporting.

Prepares and administers the budget for the transit and facility and fleet maintenance divisions; identify and research the sources of funding and monitor and comply with funding requirements.

Manages the work of staff including coaching staff for improvement and development, training, assigning, reviewing and evaluating work performance; coordinating activities, maintaining standards, allocating personnel, selecting new employees, acting on employee problems and recommending and implementing employee discipline; acts as union first point of contact, provides initial interpretation of issues and problem resolution.

Monitor staff compliance with policies and procedures; as well as local, state and federal rules and regulations; manages the proper maintenance of employee record's and department statistics related to assigned operations.

Directs operators and other assigned staff during emergencies or critical situations, equipment breakdowns and service delays; may serve as the Districts representative and liaison at city or county emergency operations command centers if requested.

Communicates, implements, and monitors adherence to OSHA regulations, as well as OSHA Regulations in support of District safety programs and policies.

Perform tasks associated with Federal and DOT reporting requirements, including, but are not limited to, providing oversight and management perspective relative to the Drug and Alcohol program reporting requirements; providing preparation for annual site visits, including review of policies and procedures in the TOPPS, SSEPP plan, and Operations Profile and the preparation of a response to DOT when annual review report is received.

Supports activities related to the development of transit/transportation plans and programs, supports strategic planning and the development and implementation of short term and long-range goals, in guiding decisions regarding the provision of the transit services with insight into operational/functional impacts.

Coordinates with Public Information Office to promote new routes and major changes that offer the greatest opportunity for increased ridership; supervises and investigates and resolves customer complaints.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:

A. A Bachelor's degree from an accredited four-year college or university in Transportation, Public Administration, Transportation Planning, Business Administration or directly related field;

AND

B. Ten (10) years of increasingly responsible experience in transit operations, three (3) years of which in a supervisory capacity;

OR

C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Thorough Knowledge of** transit system operations, including principles of organization, routing and scheduling; principles and practices of supervision including employee relations, performance evaluation, employee motivation and training, delegation and employee discipline; Federal, State and local laws, legislative mandates, regulations, policies and guidelines related to the operation of a public transit system; principles and practices of safe working practices in transit operations; experience in manual and automated schedule making, run cutting techniques and rostering; methods and techniques of researching and interpreting data and information; transit planning and transit scheduling including transit demand modeling; multimodal networks and alternative transit modes; principles and practices of public transit systems; high quality customer methodologies and principals.

**Considerable skill** in the art of diplomacy and cooperative problem solving. **Skill in** computer software programs including MS Word, Excel, Outlook, and PowerPoint; operating audio-visual equipment; public speaking; math skills; English and grammar skills; methods and techniques of researching and interpreting data and information.

**Ability to** maintain confidentiality related to all privileged documents and information; Plan and supervise the work of subordinate staff including coordinating, prioritizing, assigning, monitoring, and evaluating work; hiring, training, counseling, disciplining staff and processing grievances; analyze and recommend solutions to complex operational and personnel problems and issues; make sound decisions, establish and maintain procedures or effective daily operation of the transit system; operate a computer including word processing, spread sheet and database applications; perform basic mathematical calculations; develop and monitor a department and divisional budgets and establish budgetary controls; prepare concise and effective written communications; manage multiple projects and operations simultaneously; work independently under time deadlines and within project budget; maintain credibility while balancing competing demands within the District; build and maintain effective working relationships with those contacted in the course of work using principles of good customer service; make public presentations and communicate effectively both orally and writing; establish and maintain effective and cooperative working relationships with District Employees, member entities and the general public; exercise independent judgment in the analysis and solution of complex service delivery and scheduling issues.

3. Special Qualifications:

Must possess a valid Commercial Driver's License (CDL/P- Passenger/ Airbrake endorsements) with a satisfactory driving record. Must be able to obtain a CDL license within one year of employment with the District. Must be able to work with no advance notice additional hours, evenings, on-call, holidays and weekends and be able to travel. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform various essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Frequent travel required in normal course of job performance.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

\*\*\*\*\*

**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director



Date

4/14/19



# *North Central Regional Transit District*

## **Job Description**

<b>Title:</b>	Senior Transit Supervisor	<b>Code:</b>	<b>305</b>
<b>Division:</b>	Field Operations	<b>Effective Date:</b>	07/20
<b>Department:</b>	Operations	<b>Last Revised:</b>	05/20
<b>FLSA Status: Non-Exempt</b>			

### GENERAL PURPOSE

Coordinates and directs the movement of NCRTD public transit vehicles through the supervision of operations coordinators and dispatch/customer service representatives; manage, coordinate and deliver training for the Driver's Academy to ensure all staff is adequately trained and understands and adheres to all safety and security standards.

### SUPERVISION RECEIVED

Works under the general supervision of the Transit Operations Manager

### SUPERVISION EXERCISED

Provides close to general supervision to Operations Coordinators and Customer Service Representative(s).

### ESSENTIAL FUNCTIONS

Develops and delivers classroom training to ensure compliance; deliver all Driver Academy training and assist with Safety Training Programs to employees; Schedules and conducts re-cert and re-training.

Performs variety of supervisory, administrative, reporting, tracking and customer service tasks as needed to fulfill daily transportation commitments and schedules; monitors services in process and evaluates operational performance to ensure quality and customer satisfaction; trouble shoots and manages emergency situations, adjusts to customer issues; assess best solution and utilizes most effective and efficient resources; prepares fuel utilization, rider accident, maintenance and "tally sheet" and demand manifest reports; suspends "no-show" riders.

Responsible for staff professional development, including development of performance plans and conducting annual performance appraisals. Makes hiring, termination, and disciplinary recommendations for subordinate staff.

Ensures that Transit Operations Coordinators and Dispatcher/customer service representatives observe and adhere to all federal, state and local laws, rules and procedures; and to all District and Transit Division operating policies and procedures; observes and adheres to policies and procedures specified in the current Collective Bargaining Agreement.

Monitors and evaluates Transit Operations Coordinators and Dispatcher/Customer Service Representatives in-service performance provides additional instruction and feedback, recommends additional training when needed, and documents information used for progressive discipline in conformance with District policies and Collective Bargaining Agreement.

Provides instruction and evaluation to Transit Operations Coordinators and Dispatcher/Customer Service Representatives in behind the wheel skills; proper pre-trip and post-trip bus inspections; safety and security issues; defensive driving, customer relations and emergency management skills; and proper accident procedures and prevention techniques; conducts new hire orientation, training and evaluation; and annual refresher training programs.

Assists, monitors, and oversees Dispatcher/Customer Services Representatives and Transit Operators with special re-routing due to road closures caused by weather, street construction, traffic accidents, etc.

Oversees and monitors the preparation of the daily/weekly work schedule by the Dispatcher/customer service representatives/Customer Services Representatives to ensure adequate coverage of all bus routes.

Performs field supervisory duties, e.g., customer relations; on-time performance; ride checks; route evaluation; re-routing; bus stop and passenger shelter inspections; accident/incident investigations; and coaching and guidance.

Prepares and submits bi-weekly, for all Transit Operations Coordinators and Dispatcher/Customer Service Representative under their supervision, a computerized payroll form.

Maintains up-to-date Transit Operations Coordinators and Dispatcher/Customer Service Representative files documenting all performance appraisal reviews, commendations, training, incidents and accidents, informal coaching and guidance, written reprimands, and formal disciplinary actions.

Serves as Dispatcher/Customer Service Representative or Transit Operations Coordinator in cases of emergency or because of unforeseen staffing shortages.

Assures drivers are available and assigned to vehicles in computer system; monitors actual performance via AVL/MTD and two-way radio systems (for future CAD software).

Analyzes and makes recommendations regarding schedule adherence, and other operational needs or problems; reports discrepancies and/or unsafe conditions to appropriated personnel; and recommends and implements corrective actions. Reviews schedule for any necessary changes.

Receives, researches, and resolves customer complaints; conducts customer/site inspections; opens/closes facility to allow access for employees; issues oral and written instructions to staff on schedule changes, fares, policies, etc.; updates staff and files with various document information.

- Prepares and submits accident-related compliance forms, maintains files, or otherwise submits data to appropriate person or organization.
- Performs road checks of driver performance.
- Provides various reports and analyzes, including safety trends. Develops cost saving recommendations.

Performs related duties as required.

#### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from high school or GED;

AND

B. Eight (8) years of progressively responsible experience in passenger bus transportation (i.e., school bus, fixed-route, Para-transit, transit agency, charter bus, etc.) work experience; two (2) years of which must have been in a lead position;

OR

C. An equivalent combination of education and experience related transit field services supervision.

2. Knowledge, Skills and Abilities:

**Considerable Knowledge** of supervisory principles and practices. Ability to use computers and variety of software programs; the ability to plan, assign, direct, coordinate and review the work of others; to establish effective working relationships with associates and the public; to communicate effectively and to produce required reports relative to transit operations; principles and practices of customer service and public relations methods; operation principles, methods, systems and traffic regulations to be used in implementing an efficient, safe and dependable transit program; applicable federal, state and local laws, rules and regulations.

**Some Skill** in supervision, operation of transportation vehicles, computer operations, etc.

**Ability** to read and understand maps and time tables, which includes determining directions and following a mapped-out route; use prudent judgment and common sense in making quick, safe decisions with minimal supervision and adapt to constantly changing operating environments; work unusual hours, split shifts, weekends, holidays, and overtime as required; effectively communicate, both orally and in writing, while interacting with customers and RTD staff in a courteous, professional manner. This includes providing good customer service by attending to the needs of a diverse customer base in a sensitive manner; work and maintain professional composure while under stress and pressure; handle matters of a confidential nature; climb stairs, reach above shoulder level, walk for an extended distance, bend, stoop, lift, and push/pull up to 70 pounds without assistance as well as sit for an extended length of time; work effectively in a diverse workforce.

3. Special Qualifications:

**For Driving by District Regulations:** (1) Ability to sit without discomfort for prolonged periods of time on a variety of driver's seats in different models of transit vehicles, and fit behind the steering wheel with clearance between abdomen and wheel; (2) turn head up to 180 degrees in either direction on a regular and frequent basis; (3) walk to enter and exit the vehicle. **For Wheel Chair Tie-Downs:** Ability to bend, crouch, and/or kneel and balance while simultaneously manipulating and fastening tie-down straps. **Licensing and Special Requirements:** (1) Must obtain and maintain a valid State of New Mexico Commercial Driver's License(CDL-A or B) with (P) endorsement and airbrake certification or

must obtain and maintain a NM Commercial Driver's License (CDL-A or B) with a "P" endorsement through the North Central Regional Transit District within six (6) weeks of hire date and meet the District's driving standards; obtain and maintain all other endorsements/clearances required by DMV and obtain DOT medical certificate and maintain such for the duration of employment as a Driver. (2) Must satisfactorily complete the District's New Operator Training Program. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing. Provides on-call response to operations issues, 24/7.

4. Work Environment:

While performing the duties of this job, the employee is normally within a field environment; exposure to dust, fumes, exhausts, various noise levels, various temperatures, and chemicals for an extended length of time as well as in various outdoors weather conditions as required. Position requires maintaining physical condition necessary for sitting for prolonged periods of time.

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5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director: \_\_\_\_\_ Date \_\_\_\_\_



# North Central Regional Transit District Job Description

<b>Title:</b>	Transit Operations Manager	<b>Code:</b>	310
<b>Division:</b>	Operations Administration	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Exempt</b>			

GENERAL PURPOSE

Performs **administrative and supervisory duties** as needed to plan, organize, and coordinate the day-to-day delivery of transportation services for fixed route, express, commuter, demand and para-transit services; including central dispatch/customer services and operations.

SUPERVISION RECEIVED

Works under the general supervision of the Fleet & Facilities Operations Director.

SUPERVISION EXERCISED

Provides close to general supervision to the Transit Route Supervisors (TRS) and assigned support staff as assigned.

ESSENTIAL FUNCTIONS

Sets the tone for a positive organizational image and be an agent for change and process improvement; provides supervision, guidance and direction to Transit Route Supervisors and is responsible to create the monthly supervisor schedule.

Manages the direction and priorities for the day-to-day operations of the Transit Operations Division with a goal of providing safe, reliable and efficient bus service.

Assists with "opening" and "closing" supervisor duties when needed; provide route coverage during periods of operator shortages.

Conduct transit operator behind the wheel assessments on TRSs, Lead Transit Operators and Fleet and Facilities Staff; review the daily coversheet to ensure operators have enough time for resting and recovery between scheduled work assignments. Ensures proper route coverage with minimal overtime impact.

Maintains constant contact with dispatch if a run and / or route could not be filled before its scheduled departure from base or if developing problem occur.

Manages fixed route operator scheduling (coversheet), Avail (ITS), EWS (timekeeping software) and Adept (para-transit service scheduling software).

Ensure the accuracy of records such as (but not limited to): Time sheets, overtime controls, route/service performance, attendance, other fillable forms necessary for documenting accidents, incidents, injuries, etc.

Ensure that the sixth (6) month probationary performance evaluation is completed on all new operations staff prior to the probationary period ending. Work with Human Resources to complete a Personnel Action Form (PAF) confirming that the employee has passed the six-month probationary period; performs annual performance evaluations prior to employment anniversary date and reflective of the employee's actual work performance.

Conduct Operations Interviews when filling vacancies, assist with training of new employees; assists with ensuring the selection of adequate drivers.

Assist Operations Director with the creation, modifications, adjustments and calculations of the Spring and Fall Bids.

Access Avail data to assess Driver performance on routes (i.e. on-time performance, route adherence, speed adherence, Wheelchair checks, etc.) and provide written documentation of the Avail data assessment for each driver along with recommendations for areas for improving.

Assist, coach, and direct transit operators while in the field, random review of pre-trip inspections, vehicle cleanliness and proper completion of work records and reports. Perform fitness for duty assessment: hygiene, uniforms, signs of fatigue, signs of drug or alcohol, etc.

Ensure that Customer Service Representatives (CSR) and TRSs are monitoring Avail and Adept accordingly.

Ensures that all routes have properly assigned vehicles and operators. Works with Fleet Manager when adjustments need to be made. Coordinate with Fleet Manager on the scheduling of critical vehicle maintenance needs for safety reasons/defects.

Enforces District policies and procedures related to service operations, communicates policies and procedures to all operations personnel, and administers procedures and policy consistently and effectively. Responsible for District Transit Operations disciplinary actions to ensure that they are justified, completed thoroughly and free of errors.

Confirm the proper investigation of customer complaints, including supporting videos and documents. Make recommendations for coaching opportunities, retraining or disciplinary action. Follow-up with customers to ensure that the complaints have been addressed and feedback has been provided.

Ensure that TSRs document and report video surveillance findings on a weekly basis to ensure operator adherence to District policies and safe driver operations. Notify TFOD of accidents/events that need management attention. Interacts with police/fire dispatchers as needed for emergency situations. Communicate with facilities regarding field conditions of stops, shelters, trash, graffiti, etc.

Responds to unruly or difficult customers when situations have been escalated. Follow District policy for removal, warning and/or suspension from vehicles or facilities. Document removal or suspension process and acquires name of individuals removed in accordance with District policy.

Assist with Special Event Transportation planning and deployment Draft Standard Operating Procedures (SOPs) as assigned by TFOD. When known service disruptions are anticipated, perform field assessment to determine the best detour routing; create detour and implement; communicate decisions with Marketing, Planning and Operations staff.

May perform vehicle and/or passenger rescue procedures as defined by TFOD. Coordinates, develops and reviews hands-on and classroom safety related curriculums on a regular basis.

As needed, information and aid to customers regarding trip planning, routes, fares, rider policies/rules, and employment opportunities. Interacts with other staff, divisions, and managers to resolve questions or concerns, prior to contacting outside agencies.

Performs other related duties as required.

#### MINIMUM QUALIFICATIONS

##### 1. Education and Experience:

A. An Associate degree from an accredited college or university in Transportation, Public Administration, Transportation Planning, Business Administration or directly related field;

AND

B. Eight (8) years of increasingly responsible experience in transit operations, three (3) years of which in a supervisory capacity;

OR

C. An equivalent combination of education and experience.

##### 2. Knowledge, Skills and Abilities:

**Thorough Knowledge of** transit system operations, including principles of organization, routing and scheduling; principles and practices of supervision including employee relations, performance evaluation, employee motivation and training, delegation and employee discipline; Federal, State and local laws, legislative mandates, regulations, policies and guidelines related to the operation of a public transit system; principles and practices of safe working practices in transit operations; experience in manual and automated schedule making, run cutting techniques and rostering; methods and techniques of researching and interpreting data and information; transit planning and transit scheduling including transit demand modeling; multimodal networks and alternative transit modes; principles and practices of public transit systems; high quality customer methodologies and principals.

**Considerable skill** in the art of diplomacy and cooperative problem solving. **Skill in** computer software programs including MS Word, Excel, Outlook, and PowerPoint; operating audio-visual equipment; public speaking; math skills; English and grammar skills; methods and techniques of researching and interpreting data and information.

**Ability to** maintain confidentiality related to all privileged documents and information; Plan and supervise the work of subordinate staff including coordinating, prioritizing, assigning, monitoring, and evaluating work; hiring, training, counseling, disciplining staff and processing grievances; analyze and recommend solutions to complex operational and personnel problems and issues; make sound decisions, establish and maintain procedures or effective daily operation of the transit system; operate a computer including word processing, spread sheet and database applications; perform basic mathematical calculations; develop and monitor a department and divisional budgets and establish budgetary controls; prepare concise and effective written communications; manage multiple projects and operations simultaneously; work independently under time deadlines and within project budget; maintain credibility while balancing competing demands within the District; build and maintain effective working relationships with those contacted in the course of work using principles of good customer service; make public presentations and communicate effectively both orally and writing; establish and maintain effective and cooperative working relationships with District Employees, member entities and the general public; exercise independent judgment in the analysis and solution of complex service delivery and scheduling issues.

3. Special Qualifications:

Must possess a valid Driver's License with a satisfactory driving record. Must be able to obtain a CDL/P license with airbrake endorsement within six (6) months of employment with the District. Must be able to work with no advance notice, additional hours, evenings, on-call, holidays and weekends, and be able to travel. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing.

Must be available to work outside of regular business hours, as required by the demands of the position. Demonstrated skill in computer software programs including MS Word, Excel, Outlook, and PowerPoint. Familiarity working in union and non-union environments. Familiarity with public transit necessary. Comfortable speaking in front of elected officials and the public, capable of fielding questions and addressing concerns as presented

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform various essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Frequent travel required in normal course of job performance.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director: Anthony J. Martella Date 06/14/2019



# North Central Regional Transit District Job Description

<b>Title:</b>	Transit Supervisor	<b>Code:</b>	315
<b>Division:</b>	Field Operations	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs a **variety of first-line supervisory duties** as needed to organize, coordinate and oversee day-to-day delivery of safe, efficient and on time transportation services to the customer throughout the NCRTD.

SUPERVISION RECEIVED

Works under the general supervision of the Transit & Facilities Operations Director.

SUPERVISION EXERCISED

Provides close to general supervision to Transit Driver(s) and Customer Service Representative(s).

ESSENTIAL FUNCTIONS

Performs variety of supervisory, administrative, reporting, tracking and customer service tasks as needed to fulfill daily transportation commitments and schedules; monitors services in process and evaluates operational performance to ensure quality and customer satisfaction; trouble shoots and manages emergency situations, adjusts to customer issues; assess best solution and utilizes most effective and efficient resources; prepares fuel utilization, rider accident, maintenance and "tally sheet" and demand manifest reports; suspends "no-show" riders.

Ensures that Transit Operators and Dispatcher/customer service representatives observe and adhere to all federal, state and local laws, rules and procedures; and to all District and Transit Division operating policies and procedures; observes and adheres to policies and procedures specified in the current Collective Bargaining Agreement.

Monitors and evaluates Transit Operators and Dispatcher/customer Service Representatives in-service performance provides additional instruction and feedback, recommends additional training when needed, and documents information used for progressive discipline in conformance with District policies and Collective Bargaining Agreement.

Provides instruction and evaluation to Transit Operators and Dispatcher/customer service representatives in behind the wheel skills; proper pre-trip and post-trip bus inspections; safety and security issues; defensive driving, customer relations and emergency management skills; and proper accident procedures and prevention techniques; conducts new hire orientation, training and evaluation; and annual refresher training programs.

Assists, monitors, and oversees Dispatcher/Customer Services Representatives and Transit Operators with special re-routing due to road closures caused by weather, street construction, traffic accidents, etc.

Oversees and monitors the preparation of the daily/weekly work schedule by the Dispatcher/customer service representatives/Customer Services Representatives to ensure adequate coverage of all bus routes.

Performs field supervisory duties, e.g., customer relations; on-time performance; ride checks; route evaluation; re-routing; bus stop and passenger shelter inspections; accident/incident investigations; and coaching and guidance.

Prepares and submits bi-weekly, for each Transit Operator and Dispatcher/customer service representative under their supervision, a computerized payroll form.

Maintains up-to-date Transit Operator and Dispatcher/customer service representative files documenting all performance appraisal reviews, commendations, training, incidents and accidents, informal coaching and guidance, written reprimands, and formal disciplinary actions.

Serves as Dispatcher/customer service representative or Transit Operator in cases of emergency or because of unforeseen staffing shortages.

Assures drivers are available and assigned to vehicles in computer system; monitors actual performance via AVL/MTD and two-way radio systems (for future CAD software).

Analyzes and makes recommendations regarding schedule adherence, and other operational needs or problems; reports discrepancies and/or unsafe conditions to appropriated personnel; and recommends and implements corrective actions. Reviews schedule for any necessary changes.

Receives, researches, and resolves customer complaints; conducts customer/site inspections; opens/closes facility to allow access for employees; issues oral and written instructions to staff on schedule changes, fares, policies, etc.; updates staff and files with various document information.

Performs related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from high school or GED;

AND

B. Six (6) years of progressively responsible experience in passenger bus transportation (i.e., school bus, fixed-route, Para-transit, transit agency, charter bus, etc.) work experience; two (2) years of which must have been in a lead position;

OR

C. An equivalent combination of education and experience related transit field services supervision.

2. Knowledge, Skills and Abilities:

**Considerable Knowledge of** supervisory principles and practices. Ability to use computers and variety of software programs; the ability to plan, assign, direct, coordinate and review the work of others; to establish effective working relationships with associates and the public; to communicate effectively and to produce required reports relative to transit operations; principles and practices of customer service and public relations methods; operation principles, methods, systems and traffic regulations to be used in implementing an efficient, safe and dependable transit program; applicable federal, state and local laws, rules and regulations.

**Some Skill in** operation of transportation vehicles, computer operations, etc.

**Ability to** read and understand maps and time tables, which includes determining directions and following a mapped-out route; use prudent judgment and common sense in making quick, safe decisions with minimal supervision and adapt to constantly changing operating environments; work unusual hours, split shifts, weekends, holidays, and overtime as required; effectively communicate, both orally and in writing, while interacting with customers and RTD staff in a courteous, professional manner. This includes providing good customer service by attending to the needs of a diverse customer base in a sensitive manner; work and maintain professional composure while under stress and pressure; handle matters of a confidential nature; climb stairs, reach above shoulder level, walk for an extended distance, bend, stoop, lift, and push/pull up to 70 pounds without assistance as well as sit for an extended length of time; work effectively in a diverse workforce.

3. Special Qualifications:

**For Driving by District Regulations:** (1) Ability to sit without discomfort for prolonged periods of time on a variety of driver's seats in different models of transit vehicles, and fit behind the steering wheel with clearance between abdomen and wheel; (2) turn head up to 180 degrees in either direction on a regular and frequent basis; (3) walk to enter and exit the vehicle. **For Wheel Chair Tie-Downs:** Ability to bend, crouch, and/or kneel and balance while simultaneously manipulating and fastening tie-down straps. **Licensing and Special Requirements:** (1) Must obtain and maintain a valid State of New Mexico Commercial Driver's License(CDL-A or B) with (P) endorsement and airbrake certification or must obtain and maintain a NM Commercial Driver's License (CDL-A or B) with a "P" endorsement through the North Central Regional Transit District within six (6) weeks of hire date and meet the District's driving standards; obtain and maintain all other endorsements/clearances required by DMV and obtain DOT medical certificate and maintain such for the duration of employment as a Driver. (2) Must satisfactorily complete the District's New Operator Training Program. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing. Provides on-call response to operations issues, 24/7.

4. Work Environment:

While performing the duties of this job, the employee is normally within a field environment; exposure to dust, fumes, exhausts, various noise levels, various temperatures, and chemicals for an extended length of time as well as in various outdoors weather conditions as required. Position requires maintaining physical condition necessary for sitting for prolonged periods of time.

## 5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director:

*Anthony J. Marshall*

Date

*6/14/19*

# *North Central Regional Transit District*

## **Job Description**



<b>Title:</b>	Transit Security Officer II	<b>Code:</b>	320
<b>Division:</b>	Operations	<b>Effective Date:</b>	04/20
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/20
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

The purpose of this position is to perform general transit security enforcement services for the North Central Regional Transit District (NCRTD). This is accomplished by enforcing transit-related rules and policies. Assisting passengers, providing a safe and comfortable customer riding experience. Providing onsite patrols of NCRTD property and vehicles.

SUPERVISION RECEIVED

Works under the general supervision of the Director of Operations

SUPERVISION EXERCISED

None. However, may occasionally provide clarification to questions from Transit Officer I. Maybe assigned to provide field training and mentor new Transit Officer's. Maybe assigned to conduct field performance assessments of new hires regarding processes, procedures, routes and operating policies and procedures. Maybe assigned to provide lead supervision as assigned by Operations Director.

ESSENTIAL FUNCTIONS

Reporting:

- Immediately report any confrontations or security-related issues.
- Report potentially hazardous conditions in buildings or areas and items in need of repair, e.g. inoperative locks, broken fences, barrier damage, lighting and landscaping deficiencies, and any other potentially dangerous situation. Immediately follow up with written reports and log entries.
- Create written incident reports, independent from the police report, of intrusion, fire, theft, vandalism, disruptive behavior, criminal behavior, persons requiring emergency assistance, security breaches, unauthorized entry by any persons known or unknown, conditions which may be a hazard to the health or safety of employees or visitors, surveillance being conducted, or suspicious activity. Incident reports shall list all pertinent facts, including damage to property, or the observation of any unusual or suspicious activities, and immediate appropriate action taken to address the issue.
- Maintaining a written record of all checks performed; include time, date and name of the Transit Security Officer performing the checks.
- Maintain a duty log of activities or incidents that require action at a station or post. Separate additional reports shall be prepared on accidents, injuries, fires, bomb threats and all other unlawful acts, security violations, or any other unusual incidents or events using the prescribed paperwork.
- Ensure that all reports and other documents (i.e. event reports, logs, accident reports, and report of investigations), are written clearly, legibly and accurately.
- Conduct preliminary and follow-up investigations on incidents or complaints as assigned by the Transit Operations Director.
- Report all safety concerns immediately.

### Patrols and Inspections:

- Check assigned work site at the beginning and end of each shift including perimeter check, fencing, lighting, equipment, doors and overall safety and security. This check will be repeated over the course of the shift and just prior to end of shift
- Patrolling, when directed to do so by District personnel, and reporting unauthorized persons either on the property or observed attempting to enter the facility by any means other than through the appropriate gated entrances.
- Provide security during special events and emergency situations to protect facilities, employees, properties and visitors.
- Monitor building security parameters and report non-compliance of rules and regulations and taking appropriate actions.
- Conduct security inspections to ensure the protection of property, building security and fire and safety hazards.
- Plan and conduct daily scheduled and unscheduled security inspections of property and facilities.
- Monitor CCTV systems at any District sites with cameras as directed by the Transit Operations Director.

### Customer Service:

- Demonstrate a professional attitude at all times and be fully prepared to work at designated times in assigned post areas.
- Provide personalized service when appropriate to meet customer needs. When a problem arises, offer assistance.
- Communicate effectively, including seeking bilingual assistance when necessary. Maintain eye contact and check for the customer's understanding, i.e., ask questions.
- Provide general information about the District; greet Transit passengers and answer general questions about routes and the transit system.
- Offer a solution and follow through when problems arise.
- Summon medical assistance as appropriate
- Remain calm, show an understanding for the badge holders and or customer's situation and notify supervisor or management personnel when necessary to keep a situation from escalating.
- Be courteous, professional, and informative when interacting with the public, District personnel, and vendors.
- Perform other duties, as assigned.

### MINIMUM QUALIFICATIONS

#### 1. Education and Experience:

- A. High School Diploma or GED;  
AND
- B. Four (4) years' experience to demonstrate an aptitude and ability to perform above and related duties;  
OR
- C. Equivalent combination of education and experience.

***Must be able to obtain and maintain a New Mexico - Level 1 Security Guard License  
Must be able to obtain and maintain a CPR/First Aid Certification***

#### 2. **Knowledge** of general security concepts and practices related to the enforcement of applicable rules, regulations, ordinances, policies and procedures. Practical application of computers and peripheral equipment. English grammar, punctuation, spelling and usage. Principles and procedures of record keeping and basic report preparation. Safe work practices.

**Skills** – Strong customer service skills and problem solving; skilled in the operation of PC Computer, related software, fax machine, copy machine, telephone, and other office equipment. Skill in interpretation and explanation of District policies and procedures.

**Ability to** follow all District protocols and site-specific protocols. Ability to use a two-way radio. Ability to communicate clearly and concisely and to maintain courteous demeanor. Ability to prepare clear and concise reports. Establish and maintain effective working relationships with those contacted in the course of work. Perform the essential functions of the job with or without reasonable accommodation. Work flexible and irregular work hours. Ability to work independently and follow verbal and written instructions. Ability to maintain confidentiality as needed.

3. **Work Environment:**

While performing the duties of this job, the employee is normally within a field environment; exposure to dust, fumes, exhausts, various noise levels, various temperatures, and chemicals for an extended length of time as well as in various outdoors weather conditions as required. Position requires maintaining physical condition necessary for sitting, standing and walking for prolonged periods of time running and light carrying. Exposure to potentially hostile environments; and inclement weather conditions.

4. **Professional Standards:**

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

\*\*\*\*\*

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Approved by Executive Director: \_\_\_\_\_ Date \_\_\_\_\_



# North Central Regional Transit District Job Description

<b>Title:</b>	Customer Service Representative II	<b>Code:</b>	320
<b>Division:</b>	Operations Administration	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs **full performance level, front-line customer service** as needed to respond to the general public's calls for assistance and information. Performs ongoing clerical and communications functions as needed to expedite the timely recordkeeping and exchange of information for various rider requests and delivery of passenger services. Provides technical support to users of the CAD/AVL/ITS software and data management. Performs as a backup transit driver requiring a CDL.

SUPERVISION RECEIVED

Works under the close to general supervision of the Transit Shift Supervisor(s) as directed by the Transit & Facilities Operations Director (TOFD). Coordinates with Transit Planning, Projects and Grants Manager (PPGM) for technical direction regarding the ITS/CAD/AVL and related software.

SUPERVISION EXERCISED

Provides functional supervision to Customer Service Representative I while in training or on a project-by-project basis.

ESSENTIAL FUNCTIONS

Follows daily routine for work day preparations and planning by utilizing AVL/CAD software program;; receives and schedules next-day "demand" calls from the general public; conducts para-transit interviews to determine scope of service needs and scheduling options.

Analyzes and solves problems on AVL/CAD/ITS and related software for end users; provides a wide range of in-depth technical assistance to end users.

Meets regularly with PPGM and TOFD and reports any malfunctions of the AVL/CAD/ITS and related software that may require the manufacture's remedies.

Inputs, modifies and updates route data into the ITS software as directed by the PPGM. This includes but is not limited to data entry, stop geolocation, route pattern creation, block-run mapping, et cetera.

Provides end user set up and basic training on AVL/CAD/ITS and related software.

Assists with development of in-house procedures, processes and policies regarding utilization of AVL/CAD/ITS and related software.

Facilitates supervisors and customer service representatives in utilization of ITS to its full functionality for provision of customer services, driver route adherence and management and compliance with traffic laws and District rules and regulations.

Maintains a database of software issues and may interact with vendor support as directed by PPGM as needed for corrections. Informs PPGM of vendor interactions and software issues.

Utilizes ITS and related software to maintain daily ridership numbers; receives and processes driver ride reports, calculates total ridership, catalogs incident reports, tracks service delays and service losses, enters data into software fields and generates various automated reports; may create and/or use customized spreadsheets as needed.

Operate a multi-channel radio system to receive and transmit calls; ensures effective and timely communication with drivers; receives and disseminates all incoming calls from public; ensures compliance with FCC Rules and Regulations and NCIC and District rules and Regulations governing radio operations; acts as the direct communicative link between drivers, supervisors, law enforcement and emergency responders during accidents, incidents or community crises.

Log in all calls incoming/outgoing via telephone/radio to appropriate logs as required; maintains accurate and detailed logs on radio, telephone, referrals, and other various logs needed to complete schedules for vehicle operators and for reporting purposes.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:

- A. Graduation from high school;
- AND
- B. Two (2) year of experience performing above or related duties;
- OR
- C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Working Knowledge of** transit system operations, routing and scheduling; various computer applications; modern office practices, procedures, and equipment including a computer; basic customer relations techniques, i.e. fostering a positive attitude, maintain a courteous, helpful and professional demeanor, etc.; principles and procedures of record keeping; basic mathematic principles.

**Skill in** using personal computers and applicable software applications including spreadsheets; English and grammar skills. Versed in email communication.

**Ability to** demonstrate maturity sufficient to deal with high volume customer service calls and related customer service stress; keep all information confidential within the department; adhere to all approved District policies and procedures and regulations; maintain a clean, healthy, and safe working environment; be responsible and accountable for property assigned. Ability to interpret transit data and problem solve.

3. Special Qualifications:

Required to work different shifts, holidays, weekends, and overtime as required or requested. Must possess a valid Driver's License with a satisfactory driving record. Possess of a CDL license with multi-passenger "P" endorsement within six (6) months of hire date is required. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform various essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Occasional travel required in normal course of job performance.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).

- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

\*\*\*\*\*

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Approved by Executive Director: Anthony J. Marino Date 06/14/2019



# North Central Regional Transit District Job Description

<b>Title:</b>	Customer Service Representative I	<b>Code:</b>	321
<b>Division:</b>	Operations Administration	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs **working performance level, front-line customer service** as needed to respond to the general public's calls for assistance and information. Performs ongoing clerical and communications functions as needed to expedite the timely recordkeeping and exchange of information for various rider requests and delivery of passenger services. Provides technical support to users of the CAD/AVL/ITS software and data management.

SUPERVISION RECEIVED

Works under the close to general supervision of the Transit Shift Supervisor(s) as directed by the Transit & Facilities Operations Director (TOFD). Coordinates with Transit Planning, Projects and Grants Manager (PPGM) for technical direction regarding the ITS/CAD/AVL and related software.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Follows daily routine for work day preparations and planning by utilizing AVL/ CAD software program; prepares route assignments, including "demand" and "set route" assignments; receives and schedules next-day "demand" calls from the general public; distributes daily manifests to paratransit/ on-demand drivers; updates drivers as needed in software program Adept.

Utilizes AVL/ CAD software program to maintain daily ridership numbers; receives and processes driver ride reports, calculates total ridership, enters data into software fields and generates various automated reports from software application; may use customized spreadsheets as needed; verifies Taos paratransit/ on-demand on a daily basis in Adept Program; sends documents to Main office with demand fares.

Operates a multi-channel radio system to receive and transmit calls; ensures effective and timely communication with drivers; receives and disseminates all incoming calls from public; ensures compliance with FCC Rules and Regulations and NCIC and District rules and Regulations governing radio operations; acts as the direct communicative link between drivers, supervisors, law enforcement and emergency responders during accidents, incidents or community crisis.

Log in all calls incoming/outgoing via telephone/ radio to appropriate logs as required; maintains accurate and detailed logs on radio, telephone, referrals, and other various logs needed to complete schedules for vehicle operators and for reporting purposes; completes a daily shift report with all details on a daily basis.

Responds to emergency driving demands; fills in for absent non-CDL drivers.

Assists with driver paperwork for Human Services department, Finance, Fleet and Facilities etc.; transfers documents from HR to employees; assists with leave requests, time corrections and other documents needing to get from the Taos office to the Espanola office; maintains communication between drivers and admin. Departments.

Creates tally sheets/ spreadsheets for all routes within the district; organizes binders with needed documents; Keeping all current schedules available for drivers to keep in buses.

Assists drivers with Performance Pro evaluations; provides drivers with login information and training on how to use this program; informs transit route supervisor and HR department with any issues or concerns of the driver.

Assists with new employee training in the Taos office; ensures drivers have needed documents such as phone lists, 10-codes, route numbers etc.; assists with AVL training for new hires.

Performs In-Person Paratransit interviews as applications arrive in the Taos office; creates files and follows all rules and regulations for ADA; sends letters regarding status of paratransit service.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:

- A. Graduation from high school;
- AND
- B. One (1) year of experience performing above or related duties;
- OR
- C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Considerable knowledge of** ADL/ CAD software, creating spreadsheets and documenting ridership reports. **Some Knowledge of** transit system operations, routing and scheduling; various computer applications; modern office practices, procedures, and equipment including a computer; basic customer relations techniques, i.e. fostering a positive attitude, maintain a courteous, helpful and professional demeanor, etc.; principles and procedures of record keeping; basic mathematic principles.

**Some skill in** using personal computers and applicable software applications including spreadsheets; English and grammar skills. Versed in email communication; computer technology and software programs used within the district.

**Ability to** demonstrate maturity sufficient to deal with high volume customer service calls and related customer service stress; keep all information confidential within the department; adhere to all approved District policies and procedures and regulations; maintain a clean, healthy, and safe working environment; be responsible and accountable for property assigned. Ability to interpret transit data and problem solve; perform in an organized and precise manner using mathematical skills.

3. Special Qualifications:

Required to work different shifts, holidays, weekends, and overtime as required or requested. Must possess a valid Driver's License with a satisfactory driving record. Possess of a CDL license with multi-passenger "P" endorsement within six (6) months of hire date is desired but not required. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing.

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform various essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Occasional travel required in normal course of job performance.

5. Professional Standards:

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In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

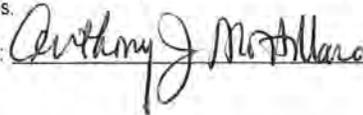
- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).

- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

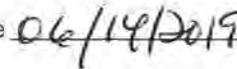
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Approved by Executive Director:



Date



# *North Central Regional Transit District*

## **Job Description**



<b>Title:</b>	Transit Security Officer I	<b>Code:</b>	-
<b>Division:</b>	Operations	<b>Effective Date:</b>	04/20
<b>Department:</b>	Administration	<b>Last Revised:</b>	04/20
<b>FLSA Status: Non-Exempt</b>			

### GENERAL PURPOSE

The purpose of this position is to perform general transit security enforcement services for the North Central Regional Transit District (NCRTD). This is accomplished by enforcing transit-related rules and policies. Assisting passengers, providing a safe and comfortable customer riding experience. Providing onsite patrols of NCRTD property and vehicles.

### SUPERVISION RECEIVED

Works under the general supervision of the Director of Operations

### SUPERVISION EXERCISED

None.

### ESSENTIAL FUNCTIONS

#### Reporting:

- Immediately report any confrontations or security-related issues.
- Report potentially hazardous conditions in buildings or areas and items in need of repair, e.g. inoperative locks, broken fences, barrier damage, lighting and landscaping deficiencies, and any other potentially dangerous situation. Immediately follow up with written reports and log entries.
- Create written incident reports, independent from the police report, of intrusion, fire, theft, vandalism, disruptive behavior, criminal behavior, persons requiring emergency assistance, security breaches, unauthorized entry by any persons known or unknown, conditions which may be a hazard to the health or safety of employees or visitors, surveillance being conducted, or suspicious activity. Incident reports shall list all pertinent facts, including damage to property, or the observation of any unusual or suspicious activities, and immediate appropriate action taken to address the issue.
- Maintaining a written record of all checks performed; include time, date and name of the Transit Security Officer performing the checks.
- Maintain a duty log of activities or incidents that require action at a station or post. Separate additional reports shall be prepared on accidents, injuries, fires, bomb threats and all other unlawful acts, security violations, or any other unusual incidents or events using the prescribed paperwork.
- Ensure that all reports and other documents (i.e. event reports, logs, accident reports, and report of investigations), are written clearly, legibly and accurately.
- Conduct preliminary and follow-up investigations on incidents or complaints as assigned by the Transit Operations Director.
- Report all safety concerns immediately.

### Patrols and Inspections:

- Check assigned work site at the beginning and end of each shift including perimeter check, fencing, lighting, equipment, doors and overall safety and security. This check will be repeated over the course of the shift and just prior to end of shift
- Patrolling, when directed to do so by District personnel, and reporting unauthorized persons either on the property or observed attempting to enter the facility by any means other than through the appropriate gated entrances.
- Provide security during special events and emergency situations to protect facilities, employees, properties and visitors.
- Monitor building security parameters and report non-compliance of rules and regulations and taking appropriate actions.
- Conduct security inspections to ensure the protection of property, building security and fire and safety hazards.
- Plan and conduct daily scheduled and unscheduled security inspections of property and facilities.
- Monitor CCTV systems at any District sites with cameras as directed by the Transit Operations Director.

### Customer Service:

- Demonstrate a professional attitude at all times and be fully prepared to work at designated times in assigned post areas.
- Provide personalized service when appropriate to meet customer needs. When a problem arises, offer assistance.
- Communicate effectively, including seeking bilingual assistance when necessary. Maintain eye contact and check for the customer's understanding, i.e., ask questions.
- Provide general information about the District; greet Transit passengers and answer general questions about routes and the transit system.
- Offer a solution and follow through when problems arise.
- Summon medical assistance as appropriate
- Remain calm, show an understanding for the badge holders and or customer's situation and notify supervisor or management personnel when necessary to keep a situation from escalating.
- Be courteous, professional, and informative when interacting with the public, District personnel, and vendors.
- Perform other duties, as assigned.

### MINIMUM QUALIFICATIONS

#### 1. Education and Experience:

- A. High School Diploma or GED;  
AND
- B. Two (2) years' experience to demonstrate an aptitude and ability to perform above and related duties;  
OR
- C. Equivalent combination of education and experience.

***Must be able to obtain and maintain a New Mexico - Level 1 Security Guard License***

***Must be able to obtain and maintain a CPR/First Aid Certification***

#### 2. **Knowledge** of general security concepts and practices related to the enforcement of applicable rules, regulations, ordinances, policies and procedures. Practical application of computers and peripheral equipment. English grammar, punctuation, spelling and usage. Principles and procedures of record keeping and basic report preparation. Safe work practices.

**Skills** – Strong customer service skills and problem solving; skilled in the operation of PC Computer, related software, fax machine, copy machine, telephone, and other office equipment. Skill in interpretation and explanation of District policies and procedures.

**Ability to follow all District protocols and site-specific protocols. Ability to use a two-way radio. Ability to communicate clearly and concisely and to maintain courteous demeanor. Ability to prepare clear and concise reports. Establish and maintain effective working relationships with those contacted in the course of work. Perform the essential functions of the job with or without reasonable accommodation. Work flexible and irregular work hours. Ability to work independently and follow verbal and written instructions. Ability to maintain confidentiality as needed.**

3. **Work Environment:**

While performing the duties of this job, the employee is normally within a field environment; exposure to dust, fumes, exhausts, various noise levels, various temperatures, and chemicals for an extended length of time as well as in various outdoors weather conditions as required. Position requires maintaining physical condition necessary for sitting, standing and walking for prolonged periods of time running and light carrying. Exposure to potentially hostile environments; and inclement weather conditions.

4. **Professional Standards:**

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director: \_\_\_\_\_ Date \_\_\_\_\_



# North Central Regional Transit District Job Description

<b>Title:</b>	Transit Operator III / Lead	<b>Code:</b>	325
<b>Division:</b>	Field Operations	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	02/20
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs **advanced, CDL licensed duties** in the operation of assigned NCRTD transport and passenger vehicles as needed to travel assigned fixed and "demand" service routes. Must possess a CDL license with multi-passenger "P" endorsement. Assists with field training duties as assigned.

SUPERVISION RECEIVED

Works under the close to general supervision of the Transit Shift Supervisor(s) or Transit & Facilities Operations Director.

SUPERVISION EXERCISED

May provide lead supervision and training to Transit Operators on an assigned basis, or in the absence of a Supervisor.

ESSENTIAL FUNCTIONS

Performs various lead operator duties; may be assigned to provide field training and mentor new Transit Operators as they are shadowing during introductory/probationary periods; may conduct field performance exams testing new hires regarding processes, procedures, routines and operating policies and practices.

Operates assigned passenger vehicles employing defensive driving techniques, maintaining professional courtesy while under stress, making public address announcements, properly answering questions and solving transit-related concerns of passengers, and exercising prudent judgment under a variety of constantly changing operating conditions.

Conducts self in an appropriate manner as a representative of the RTD, working effectively in a diverse work environment, using prudent judgment at all times, performing duties in a safe manner, and assuring professional quality of services to all external and internal customers.

Operates transit vehicles in revenue and non-revenue service while in strict compliance with RTD policies, directives, and procedures and all Federal and New Mexico traffic laws and regulations. This includes using proper defensive driving techniques.

Performs RTD pre and post trip inspection of transit vehicles for mechanical problems prior to beginning scheduled run. This includes conducting an external/internal visual inspection of the transit vehicle and pre-testing of necessary equipment, operating/safety devices, and transit vehicle controls for use while in service. Also conducts an internal visual inspection at the end of the schedule service day to collect and turn-in lost items.

Completes accident and incident reports accurately and legibly as necessary at the end of scheduled shift resulting from traffic accidents, customer issues or complaints.

Provides customer service information in a courteous, professional manner. This includes operating the automated stop announcements system and /or stating stop and public information announcements over the public address systems, and properly answering questions and solving transit-related concerns of passengers.

Complies with American with Disabilities Act (ADA) in operating the transit vehicle. This includes providing accessibility for disabled passengers to board and de-board by properly operating the accessibility lift and safely securing such passengers in a courteous manner, announcing designated stops, and pre-testing all passenger accessibility lifts and equipment during pre-trip inspections.

Communicates with Central Dispatch for the purpose of providing information on fares, transfers, ticket refunds, routes, and other District Transit policies and rules concerning conduct, service, and policy changes.

Informs Central Dispatch of passenger lift pick-up and drop-off locations, and when hydraulic passenger lift fails to operate properly or of missed pickups of passengers.

Observes and responds to emergency situations involving passengers, the public, or buses for the purpose of maintaining public/passenger safety, and proper bus operation.

Performs other related duties as required.

#### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from high school or GED;

AND

B. Six (6) years of driving experience and preferred two (2) years of experience performing above or related duties;

OR

C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Working Knowledge of** stress management, current bus routes and stops within the District; transit system operations, routing and scheduling; basic customer relations techniques, i.e. fostering a positive attitude, maintain a courteous, helpful and professional demeanor, etc.; principles and procedures of record keeping; basic mathematic functions.

**Skill in** using personal computers and applicable software applications including spreadsheets; English and grammar skills.

**Ability to** successfully complete the Bus Operator Training Program, which includes achieving the required minimum scores on all written and driving tests and evaluations; tell time and keep a timely schedule; read and understand maps and time tables, which includes determining directions and following a mapped-out route; demonstrate maturity sufficient to deal with high volume customer service interaction and related stress; use prudent judgment and common sense in making quick, safe decisions with minimal supervision and adapt to constantly changing operating environments; keep all information confidential within the department; adhere to all approved District policies and procedures and regulations; maintain a clean, healthy, and safe working environment; be responsible and accountable for property assigned; effectively communicate, both orally and in writing, while interacting with customers and RTD staff in a courteous, professional manner. This includes providing good customer service by attending to the needs of a diverse customer base in a sensitive manner.

3. Special Qualifications:

Must be 21 years of age. **For Driving by District Regulations:** (1) Ability to sit without discomfort for prolonged periods of time on a variety of driver's seats in different models of transit vehicles, and fit behind the steering wheel with clearance between abdomen and wheel; (2) turn head up to 180 degrees in either direction on a regular and frequent basis; (3) walk to enter and exit the vehicle. **For Wheel Chair Tie-Downs:** Ability to bend, crouch, and/or kneel and balance while simultaneously manipulating and fastening tie-down straps. **Licensing and Special Requirements:** (1) Must obtain and maintain a valid State of New Mexico Commercial Driver's License(CDL-A or B) with (P) endorsement and airbrake certification or must obtain and maintain a NM Commercial Driver's License (CDL-A or B) with a "P" endorsement through the North Central Regional Transit District within six (6) weeks of hire date and meet the District's driving standards; obtain and maintain all other endorsements/clearances required by DMV and obtain DOT medical certificate and maintain such for the duration of employment as a Driver. (2) Must satisfactorily complete the District's New Operator Training Program.

4. Work Environment:

While performing the duties of this job, the employee is normally within a field environment; exposure to dust, fumes, exhausts, various noise levels, various temperatures, and chemicals for an extended length of time as well as in various outdoors weather conditions as required. Position requires maintaining physical condition necessary for sitting for prolonged periods of time.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director: Anthony J. McNeill Date 02/03/2020



# North Central Regional Transit District Job Description

<b>Title:</b>	Transit Operator II	<b>Code:</b>	326
<b>Division:</b>	Field Operations	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs **full performance level, CDL licensed duties** in the operation of assigned NCRTD transport and passenger vehicles as needed to travel assigned fixed and "demand" service routes. Must possess a CDL license with multi-passenger "P" endorsement. Assists with field training duties as assigned.

SUPERVISION RECEIVED

Works under the close to general supervision of the Transit Shift Supervisor(s) or Transit & Facilities Operations Director.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Operates assigned passenger vehicles employing defensive driving techniques, maintaining professional courtesy while under stress, making public address announcements, properly answering questions and solving transit-related concerns of passengers, and exercising prudent judgment under a variety of constantly changing operating conditions.

Conducts self in an appropriate manner as a representative of the RTD, working effectively in a diverse work environment, using prudent judgment at all times, performing duties in a safe manner, and assuring professional quality of services to all external and internal customers.

Operates transit vehicles in revenue and non-revenue service while in strict compliance with RTD policies, directives, and procedures and all Federal and New Mexico traffic laws and regulations. This includes using proper defensive driving techniques.

Performs RTD pre and post trip inspection of transit vehicles for mechanical problems prior to beginning scheduled run. This includes conducting an external/internal visual inspection of the transit vehicle and pre-testing of necessary equipment, operating/safety devices, and transit vehicle controls for use while in service. Also conducts an internal visual inspection at the end of the schedule service day to collect and turn-in lost items.

Completes accident and incident reports accurately and legibly as necessary at the end of scheduled shift resulting from traffic accidents, customer issues or complaints.

Provides customer service information in a courteous, professional manner. This includes operating the automated stop announcements system and /or stating stop and public information announcements over the public address systems, and properly answering questions and solving transit-related concerns of passengers.

Complies with American with Disabilities Act (ADA) in operating the transit vehicle. This includes providing accessibility for disabled passengers to board and de-board by properly operating the accessibility lift and safely securing such passengers in a courteous manner, announcing designated stops, and pre-testing all passenger accessibility lifts and equipment during pre-trip inspections.

Communicates with Central Dispatch for the purpose of providing information on fares, transfers, ticket refunds, routes, and other District Transit policies and rules concerning conduct, service, and policy changes.

Informs Central Dispatch of passenger lift pick-up and drop-off locations, and when hydraulic passenger lift fails to operate properly or of missed pickups of passengers.

Observes and responds to emergency situations involving passengers, the public, or buses for the purpose of maintaining public/passenger safety, and proper bus operation.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

## 1. Education and Experience:

A. Graduation from high school or GED;

AND

B. Five (5) years of driving experience and preferred one (2) years of experience performing above or related duties;

OR

C. An equivalent combination of education and experience.

## 2. Knowledge, Skills and Abilities:

**Working Knowledge** of current bus routes and stops within the District; transit system operations, routing and scheduling; basic customer relations techniques, i.e. fostering a positive attitude, maintain a courteous, helpful and professional demeanor, etc.; principles and procedures of record keeping; basic mathematic functions. **Some knowledge** of stress management.

**Skill in** using personal computers and applicable software applications including spreadsheets; English and grammar skills.

**Ability to** successfully complete the Bus Operator Training Program, which includes achieving the required minimum scores on all written and driving tests and evaluations; tell time and keep a timely schedule; read and understand maps and time tables, which includes determining directions and following a mapped-out route; demonstrate maturity sufficient to deal with high volume customer service interaction and related stress; use prudent judgment and common sense in making quick, safe decisions with minimal supervision and adapt to constantly changing operating environments; keep all information confidential within the department; adhere to all approved District policies and procedures and regulations; maintain a clean, healthy, and safe working environment; be responsible and accountable for property assigned; effectively communicate, both orally and in writing, while interacting with customers and RTD staff in a courteous, professional manner. This includes providing good customer service by attending to the needs of a diverse customer base in a sensitive manner.

## 3. Special Qualifications:

Must be 21 years of age. **For Driving by District Regulations:** (1) Ability to sit without discomfort for prolonged periods of time on a variety of driver's seats in different models of transit vehicles, and fit behind the steering wheel with clearance between abdomen and wheel; (2) turn head up to 180 degrees in either direction on a regular and frequent basis; (3) walk to enter and exit the vehicle. **For Wheel Chair Tie-Downs:** Ability to bend, crouch, and/or kneel and balance while simultaneously manipulating and fastening tie-down straps. **Licensing and Special Requirements:** (1) Must obtain and maintain a valid State of New Mexico Commercial Driver's License (CDL-A or B) with (P) endorsement and airbrake certification or must obtain and maintain a NM Commercial Driver's License (CDL-A or B) with a "P" endorsement through the North Central Regional Transit District within six (6) weeks of hire date and meet the District's driving standards; obtain and maintain all other endorsements/clearances required by DMV and obtain DOT medical certificate and maintain such for the duration of employment as a Driver. (2) Must satisfactorily complete the District's New Operator Training Program.

## 4. Work Environment:

While performing the duties of this job, the employee is normally within a field environment; exposure to dust, fumes, exhausts, various noise levels, various temperatures, and chemicals for an extended length of time as well as in various outdoors weather conditions as required. Position requires maintaining physical condition necessary for sitting for prolonged periods of time.

## 5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

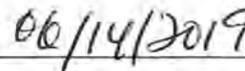
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Approved by Executive Director:



Date





# *North Central Regional Transit District*

## **Job Description**

<b>Title:</b>	Transit Operator I	<b>Code:</b>	<b>327</b>
<b>Division:</b>	Field Operations	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

### GENERAL PURPOSE

Performs **working level, non-CDL licensed duties** in the operation of assigned NCRTD transport and passenger vehicles as needed to travel assigned fixed and "demand" service routes.

### SUPERVISION RECEIVED

Works under the close to general supervision of the Transit Shift Supervisor(s), Transit Operations Manager or Transit & Facilities Operations Director.

### SUPERVISION EXERCISED

None.

### ESSENTIAL FUNCTIONS

Operates assigned passenger vehicles employing defensive driving techniques, maintaining professional courtesy while under stress, making public address announcements, properly answering questions and solving transit-related concerns of passengers, and exercising prudent judgment under a variety of constantly changing operating conditions.

Conducts self in an appropriate manner as a representative of the RTD, working effectively in a diverse work environment, using prudent judgment at all times, performing duties in a safe manner, and assuring professional quality of services to all external and internal customers.

Operates transit vehicles in revenue and non-revenue service while in strict compliance with RTD policies, directives, and procedures and all Federal and New Mexico traffic laws and regulations. This includes using proper defensive driving techniques.

Performs RTD pre and post trip inspection of transit vehicles for mechanical problems prior to beginning scheduled run. This includes conducting an external/internal visual inspection of the transit vehicle and pre-testing of necessary equipment, operating/safety devices, and transit vehicle controls for use while in service. Also conducts an internal visual inspection at the end of the schedule service day to collect and turn-in lost items.

Completes accident and incident reports accurately and legibly as necessary at the end of scheduled shift resulting from traffic accidents, customer issues or complaints.

Provides customer service information in a courteous, professional manner. This includes operating the automated stop announcements system and /or stating stop and public information announcements over the public address systems, and properly answering questions and solving transit-related concerns of passengers.

Complies with American with Disabilities Act (ADA) in operating the transit vehicle. This includes providing accessibility for disabled passengers to board and de-board by properly operating the accessibility lift and safely securing such passengers in a courteous manner, announcing designated stops, and pre-testing all passenger accessibility lifts and equipment during pre-trip inspections.

Communicates with Central Dispatch for the purpose of providing information on fares, transfers, ticket refunds, routes, and other District Transit policies and rules concerning conduct, service, and policy changes.

Informs Central Dispatch of passenger lift pick-up and drop-off locations, and when hydraulic passenger lift fails to operate properly or of missed pickups of passengers.

Observes and responds to emergency situations involving passengers, the public, or buses for the purpose of maintaining public/passenger safety, and proper bus operation.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:
  - A. Graduation from high school or GED;
  - AND
  - B. Four (4) years of driving experience and preferred one (1) year of experience performing above or related duties;
  - OR
  - C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Working Knowledge of** current bus routes and stops within the District; transit system operations, routing and scheduling; basic customer relations techniques, i.e. fostering a positive attitude, maintain a courteous, helpful and professional demeanor, etc.; principles and procedures of record keeping; basic mathematic functions. **Some knowledge of** stress management.

**Skill in** using personal computers and applicable software applications including spreadsheets; English and grammar skills.

**Ability to** successfully complete the Bus Operator Training Program, which includes achieving the required minimum scores on all written and driving tests and evaluations; tell time and keep a timely schedule; read and understand maps and time tables, which includes determining directions and following a mapped-out route; demonstrate maturity sufficient to deal with high volume customer service interaction and related stress; use prudent judgment and common sense in making quick, safe decisions with minimal supervision and adapt to constantly changing operating environments; keep all information confidential within the department; adhere to all approved District policies and procedures and regulations; maintain a clean, healthy, and safe working environment; be responsible and accountable for property assigned; effectively communicate, both orally and in writing, while interacting with customers and RTD staff in a courteous, professional manner. This includes providing good customer service by attending to the needs of a diverse customer base in a sensitive manner.

3. Special Qualifications:

Must be 21 years of age. **For Driving by District Regulations:** (1) Ability to sit without discomfort for prolonged periods of time on a variety of driver's seats in different models of transit vehicles, and fit behind the steering wheel with clearance between abdomen and wheel; (2) turn head up to 180 degrees in either direction on a regular and frequent basis; (3) walk to enter and exit the vehicle. **For Wheel Chair Tie-Downs:** Ability to bend, crouch, and/or kneel and balance while simultaneously manipulating and fastening tie-down straps. **Licensing and Special Requirements:** (1) Must meet the District's driving standards; obtain and maintain all other endorsements/clearances required by DMV and obtain DOT medical certificate and maintain such for the duration of employment as a Operator. (2) Must satisfactorily complete the District's New Operator Training Program.

4. Work Environment:

While performing the duties of this job, the employee is normally within a field environment; exposure to dust, fumes, exhausts, various noise levels, various temperatures, and chemicals for an extended length of time as well as in various outdoors weather conditions as required. Position requires maintaining physical condition necessary for sitting for prolonged periods of time.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director:

 Date 6/14/19



# North Central Regional Transit District Job Description

<b>Title:</b>	Transit Operations Coordinator	<b>Code:</b>	330
<b>Division:</b>	Field Operations	<b>Effective Date:</b>	07/20
<b>Department:</b>	Operations	<b>Last Revised:</b>	05/20
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

The Operations Coordinator will provide assistance to the Transit Shift Supervisors, Senior Transit Supervisor and Operations Manager with a **variety of first-line supervisory duties** as needed to organize, coordinate and oversee day-to-day delivery of safe, efficient and on time transportation services to the customer throughout the NCRTD. and to keep bus service safely operating, To coordinate and oversee day-to-day delivery of safe, efficient and on time transportation services, to ensure all policies and procedures are adhered to and for responding to emergency situations. Operations Coordinators will provide overall backup in the absence of a Transit Route Supervisor, Transit Operator or Dispatch and support to Transit Operators in all phases of transit route operations. This position is deemed to be a "supervisor in training".

SUPERVISION RECEIVED

Works under the general supervision of the Senior Transit Supervisor or Operations Manager.

SUPERVISION EXERCISED

Provides close to general supervision to Transit Operator(s) and Customer Service Representative(s).

ESSENTIAL FUNCTIONS

Performs variety of supervisory, administrative, reporting, tracking and customer service tasks as needed to fulfill daily transportation commitments and schedules; monitors services in process and evaluates operational performance to ensure quality and customer satisfaction; trouble shoots and manages emergency situations, adjusts to customer issues; assess best solution and utilizes most effective and efficient resources; prepares fuel utilization, rider accident, maintenance and "tally sheet" and demand manifest reports; suspends "no-show" riders.

Ensures that Transit Operators and Dispatcher/customer service representatives observe and adhere to all federal, state and local laws, rules and procedures; and to all District and Transit Division operating policies and procedures; observes and adheres to policies and procedures specified in the current Collective Bargaining Agreement.

Monitors and evaluates Transit Operators and Dispatcher/customer Service Representatives in-service performance provides additional instruction and feedback, recommends additional training when needed, and documents information used for progressive discipline in conformance with District policies and Collective Bargaining Agreement.

Provides instruction and evaluation to Transit Operators and Dispatcher/customer service representatives in behind the wheel skills; proper pre-trip and post-trip bus inspections; safety and security issues; defensive driving, customer relations and emergency management skills; and proper accident procedures and prevention techniques; conducts new hire orientation, training and evaluation; and annual refresher training programs.

Assists, monitors, and oversees Dispatcher/Customer Services Representatives and Transit Operators with special re-routing due to road closures caused by weather, street construction, traffic accidents, etc.

Assists with the preparation of the daily/weekly work schedule to ensure adequate coverage of all bus routes.

Performs field supervisory duties, e.g., customer relations; on-time performance; ride checks; route evaluation; re-routing; bus stop and passenger shelter inspections; accident/incident investigations; and coaching and guidance.

Prepares and submits bi-weekly, for each Transit Operator and Dispatcher/customer service representative under their supervision, a computerized payroll form.

Maintains up-to-date Transit Operator and Dispatcher/customer service representative files documenting all performance appraisal reviews, commendations, training, incidents and accidents, informal coaching and guidance, written reprimands, and formal disciplinary actions.

Serves as Dispatcher/customer service representative or Transit Operator in cases of emergency or because of unforeseen staffing shortages.

Assures drivers are available and assigned to vehicles in computer system; monitors actual performance via AVL/MTD and two-way radio systems (for future CAD software).

May be assigned to provide field training and mentor new Transit Operators as they are shadowing during introductory/probationary periods; may conduct field performance exams testing new hires regarding processes, procedures, routines and operating policies and practices.

Operates assigned passenger vehicles employing defensive driving techniques, maintaining professional courtesy while under stress, making public address announcements, properly answering questions and solving transit-related concerns of passengers, and exercising prudent judgment under a variety of constantly changing operating conditions.

Analyzes and makes recommendations regarding schedule adherence, and other operational needs or problems; reports discrepancies and/or unsafe conditions to appropriated personnel; and recommends and implements corrective actions. Reviews schedule for any necessary changes.

Receives, researches, and resolves customer complaints; conducts customer/site inspections; opens/closes facility to allow access for employees; issues oral and written instructions to staff on schedule changes, fares, policies, etc.; updates staff and files with various document information.

Performs additional related duties as required.

#### MINIMUM QUALIFICATIONS FOR OPERATIONS COORDINATOR

1. Education and Experience:

A. Graduation from high school or GED;

AND

B. Three (3) years of driving experience in passenger bus transportation (i.e., school bus, fixed-route, Para-transit, transit agency, charter bus, etc.) work experience; one (1) year of which must have been in a lead position;

OR

C. An equivalent combination of education and experience related transit field services supervision.

2.. Knowledge, Skills and Abilities for Operations Coordinator:

**Knowledge of** supervisory principles and practices. Ability to use computers and variety of software programs; the ability to plan, assign, direct, coordinate and review the work of others; to establish effective working relationships with associates and the public; to communicate effectively and to produce required reports relative to transit operations; principles and practices of customer service and public relations methods; operation principles, methods, systems and traffic regulations to be used in implementing an efficient, safe and dependable transit program; applicable federal, state and local laws, rules and regulations.

**Some Skill in** operation of transportation vehicles, computer operations, etc.

**Ability to** read and understand maps and time tables, which includes determining directions and following a mapped-out route; use prudent judgment and common sense in making quick, safe decisions with minimal supervision and adapt to constantly changing operating environments; work unusual hours, split shifts, weekends, holidays, and overtime as required; effectively communicate, both orally and in writing, while interacting with customers and RTD staff in a courteous, professional manner. This includes providing good customer service by attending to the needs of a diverse customer base in a sensitive manner; work and maintain professional composure while under stress and pressure; handle matters of a confidential nature; climb stairs, reach above shoulder level, walk for an extended distance, bend, stoop, lift, and push/pull up to 70 pounds without assistance as well as sit for an extended length of time; work effectively in a diverse workforce.

3.. Special Qualifications:

Must be 21 years of age. For Driving by District Regulations: (1) Ability to sit without discomfort for prolonged periods of time on a variety of driver's seats in different models of transit vehicles, and fit behind the steering wheel with clearance between abdomen and wheel; (2) turn head up to 180 degrees in either direction on a regular and frequent basis; (3) walk to enter and exit the vehicle. For Wheel Chair Tie-Downs: Ability to bend, crouch, and/or kneel and balance while simultaneously manipulating and fastening tie-down straps. Licensing and Special Requirements: (1) Must obtain and maintain a valid State of New Mexico Commercial Driver's License(CDL-A or B) with (P) endorsement and airbrake certification or must obtain and maintain a NM Commercial Driver's License (CDL-A or B) with a "P" endorsement through the North Central Regional Transit District within six (6) weeks of hire date and

meet the District's driving standards; obtain and maintain all other endorsements/clearances required by DMV and obtain DOT medical certificate and maintain such for the duration of employment as a Driver. (2) Must satisfactorily complete the District's New Operator Training Program. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing. Provides on-call response to operations issues, 24/7.

4. Work Environment:

While performing the duties of this job, the employee is normally within a field environment; exposure to dust, fumes, exhausts, various noise levels, various temperatures, and chemicals for an extended length of time as well as in various outdoors weather conditions as required. Position requires maintaining physical condition necessary for sitting for prolonged periods of time.

5. Professional Standards:

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In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director: Anthony J. Michillaro Date 5/21/2020



# North Central Regional Transit District Job Description

<b>Title:</b>	Operations Support Technician	<b>Code:</b>	335
<b>Division:</b>	Operations Support	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs a variety of **administrative support** duties designed to expedite day-to-day administrative functions of the Operations Department.

SUPERVISION RECEIVED

Works under general supervision of the Transit & Facilities Operations Director or Transit Operations Manager. May receive functional supervision from the Transit & Facilities Maintenance Manager on a project-by-project basis.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Coordinates and implements office services such as acquisition of supplies and materials, review of time sheets and inputting of work hours, record keeping, projects, and budgetary expenditures, monitors related administrative processes to ensure compliance with established methods, practices and procedures and maintain accuracy of administrative and financial actions and records; ensures the inclusion of all supporting documentation and signature authorizations.

Provides support and other assistance to the Transit & Facilities Operations Director, including the collection and preparation of various operations reports from daily driver report data and/or AVL/CAD software; monitors schedules and deadlines on behalf of the Transit & Facilities Operations Director.

Acts as a Designated Employer Representative (DER) for the organization; responsible for ensuring adherence to the NCRTD, FTA, and NMDOT Drug and Alcohol Policies; receives notification via IMRO for random drug test selections; may coordinate various tests, include pre-employment, random, post-accident, return to duty, and reasonable suspicion drug testing; schedules functional ability tests and pre-employment hurdles for administrative and operations staff, receives results and maintains results documentation; provides information to the Operations Director for corrective action for test failures according to established policy; may be on call or called upon after or before regular work hours to administer test procedures.

Processes daily invoices and scans payment vouchers; ensures compliance with established fiscal guidelines; creates and/or verifies purchase order numbers; follows procedures for adding vendors to vendor lists, i.e., obtaining tax certificates, etc.; receives "demand response" revenue collections; balances cash revenues and delivers deposits to finance department; assists the finance staff in the analysis of funding sources and expenditure charging and other budgetary duties including the tracking and charging of purchase requisitions and payment vouchers; assists to analyze and monitor budget in order to forecast and account for short term needs and monitors cash flow.

Receives and reconciles fuel receipts with WEX monthly fuel consumption report; posts fuel transaction reports to Excel spreadsheet for reconciliation; documents total gallon consumption and expense monthly for inclusion in year sustainability report; monitors record to verify use at State-approved fueling sites; prepares weekly report of fuel receipts and compiles for monthly review.

Monitors ridership documentation and reconciles run manifests; creates "run exceptions" report; ensures accuracy of ridership statistics for entry into "data point" software system; prepares monthly reports for ridership and performance measure analysis and inclusion in monthly board packet.

Compiles and enters all utility billing into a sustainability reporting software (Star Energy); collects data from various offices; organizes data for inclusion in year-end reports submitted to Sustainability Committee.

Analyzes operating practices such as record keeping systems, forms control, office layout, and the creation of new administrative systems as needed; makes recommendations for changes in various function procedures and implements the same upon approval.

Provides backup support coverage for Dispatch/Customer Service, also assistance with scheduling demand response services as needed; may assist with planning for special events; serves as liaison with public regarding service related to operations, and schedules; may act as first point of contact for customers regarding complaints and commendations.

Assists in the communication of operational and personnel policy information to staff and employees; may participate in interview process of applicants and conducts Operation's Department orientation of new employees; maintains training records and files; monitors employee participation in required "refresher" courses, i.e., defensive driving, first-aid, etc., as needed to maintain driver credentials; issues employee uniforms and monitors uniform inventory.

Utilizes various computer programs and applications such as spreadsheets, state and federal databases, and graphics to assemble, coordinate, and format data and/or reports.

May review or coordinate the work of others, including ensuring the accuracy of timesheets and other employee data; may coordinate and work with human resources in the accounting of employee compensatory time, annual, sick and other leave, and to track the scheduling of employee evaluations.

Performs other related duties as required.

#### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from high school; plus, two (2) years of specialized training related to administrative support functions or an associate degree in bookkeeping, secretarial science or related field;

AND

B. Two (2) years of increasingly responsible administrative support and office clerical experience, that involve frequent public contact;

OR

C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Working knowledge** of procurement policies, standard federal and state policies and requirements, and basic accounting and bookkeeping methods; proper business English usage including spelling, grammar, and syntax; modern office practices and procedures; clerical procedures and methods related to filing and documenting; report and presentation writing; personal computers and current office software programs for word processing, spreadsheet, presentation, and databases at the advanced level of proficiency; interpersonal communication skills and telephone etiquette; standard office equipment operation. **Some knowledge** of general transit system administrative processes desirable; pertinent District functions, policies, rules and regulations.

**Skill** in using personal computers and applicable software applications including spreadsheets and data base programs.

**Ability** to conduct self in an appropriate manner as a representative of the NCRTD working effectively in a diverse work environment; quickly learn District operations, programs, policies, procedures, and the functions of the assigned office; perform assigned administrative support functions with speed and accuracy under time pressure; operate a computer including word processing, spread sheet and data base applications; perform basic mathematical calculations; understand and explain District and department policies and procedures; maintain records and files; research and compile data and information, and apply analytical skills; prepare concise and effective written communications; manage multiple projects and operations simultaneously; work independently under time deadlines; build and maintain effective working relationships with those contacted in the course of work using principles of good customer service; communicate effectively both orally and writing in an office environment; maintain confidentiality.

3. Special Qualifications:

Must be available to work outside regular business hours, as required by the demands of the job. (Must possess a valid Driver's License with a satisfactory driving record.)

4. Work Environment:

Incumbent of the position generally performs in a typical office setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve some muscular strain related to walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

\*\*\*\*\*

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Approved by Executive Director: Anthony J. Intillano Date 06/14/2019



# North Central Regional Transit District Job Description

<b>Title:</b>	Fleet & Facilities Manager	<b>Code:</b>	350
<b>Division:</b>	Fleet & Facilities	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Exempt</b>			

GENERAL PURPOSE

Performs **administrative and supervisory duties** as needed to plan, organize and coordinate the day-to-day fleet and facilities operations including transit bus fleet maintenance, repair and parts procurement, fleet & facilities safety compliance, facilities maintenance & repair and surplus property and equipment disposal.

SUPERVISION RECEIVED

Works under the general supervision of the Transit & Maintenance Operations Director.

SUPERVISION EXERCISED

Provides close to general supervision to various technical, trade, and support staff.

ESSENTIAL FUNCTIONS

Assists in development and management of budgets for expenses including supplies, repairs, and other needs; monitors expenditures and account balances to ensure compliance with established spending limitations and financial management objectives.

Manages fleet fuel credit card program; recommends and implements policy and practice related to fuel card use; monitors driver compliance with established guidelines; generates daily, monthly, and quarterly reports to review and analyze fuel consumption and forecast operational demands.

Manages and oversees the maintenance and administration, utilizing fleet maintenance software, of all aspects of the organization's fleet transportation vehicles; oversee all operations for transit fleet vehicles, including the procurement, servicing, operation, maintenance, and repairs of NCRTD vehicles.

Monitors, evaluates, and improves operations related to the efficiency, safety, and financial effectiveness of the fleet; researches, evaluates, and participates in the procurement and negotiation of vehicle replacement, including the preparation of customized specifications for NCRTD needs.

Directs and performs safety inspections of all new and existing vehicles to ensure vehicles are in compliance with established laws, regulations, and policies; ensures the proper and timely repair of vehicles in violation of safety standards.

Serves as fleet operator trainer; acts as CDL examiner; trains drivers in pre-trip procedures and inspection processes; may conduct "maneuvering over the road" driving examinations; ensures compliance with New Mexico DOT commercial driver licensing laws, rules and regulations.

Assists the Transit & Maintenance Operations Director as needed and acts as the Transit & Maintenance Operations Director in their absence as assigned by the Executive Director.

Directs and monitors off-site maintenance and repair of vehicles; establishes effective working relationships with contract service providers as needed to expedite the completion of maintenance and repair to return vehicles to operation and service; monitors quality of services received; directs and oversees emergency repair and recovery functions for roadside vehicles; develops schedules for vehicle maintenance and repair and ensures adherence to such schedules.

Manages and coordinates the acquisition of vehicles, materials, equipment, parts, etc., in compliance with NCRTD Procurement Codes; solicits bids according to established guidelines; participates in making bid awards to most responsible bidders; maintains stock and supplies to meet maintenance and servicing needs for both fleet and buildings; directs related inventory functions.

Manages the final disposition and disposal of shop waste and surplus equipment, including used NCRTD vehicles according to all laws and regulations; maintains all records and requirements for the fleet, including vehicle registrations, inspection records, repair records, and records for warranties, etc.

Manages the construction and maintenance of infrastructure associated with bus line stops and passenger waiting areas; oversees installation of signage and postings related to infrastructure needs and requirements.

Manages, oversees and administers, utilizing facilities maintenance software, the maintenance of all aspects of the organization's Administrative, Operations, and Maintenance Facility (The Jim West Building); ensure that all building systems continue to operate efficiently and that the physical condition of the facility does not deteriorate; ensures that all building features are in compliance with all regulations and policies.

Maintains records for maintenance and repair work on the facility and to record all safety inspections; develops schedules and priorities for maintenance and repair work on the facility and ensures the adherence to such schedules; ensures compliance with facility safety standards.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from college with bachelor's degree in public facilities management, fleet administration or a directly related field;

AND

A. Eight (8) years of progressively responsible experience performing above or related duties, two (2) years in a supervisory capacity;

OR

C. An equivalent combination of education and experience related to "rolling stock" management and facility maintenance.

2. Knowledge, Skills and Abilities:

**Thorough Knowledge** of methods, practices, and procedures of fleet management and building maintenance and repair; business and financial principles, such as budgeting, contract development, and the establishing of price agreements; depreciation factors and fleet condition reports. **Working knowledge** of the Wright Express Fuel Card System; NCRTD Procurement Code; occupational hazards and the necessary safety precautions applicable to vehicle and building maintenance work.

**Considerable skill** in the art of diplomacy and cooperative problem solving. **Skill** in using personal computers and applicable software applications including spreadsheets programs; operating audio-visual equipment; public speaking; math skills; English and grammar skills; hand and power tools.

**Ability to** clearly and effectively communicate both verbally and in writing.

3. Special Qualifications:

Must possess a valid Driver's License with a satisfactory driving record. Must be able to obtain a CDL Class B license with passenger (P) and air brake endorsement within six months of employment with the District. Demonstrated skill in computer software programs including MS Word, Excel, Outlook, and PowerPoint. Must be current or acquire within six (6) months the following ASE certification(s); ASE-Certified Master Transit Bus Technician. Must be able to work with no advance notice additional hours, evenings, on-call, holidays and weekends and be able to travel. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing.

4. Work Environment:

Incumbent of the position generally performs in a facility setting with appropriate climate controls. Tasks require a variety of physical activities, generally involve moderate muscular strain, such as walking, standing, stooping, sitting, reaching and lifting. Must be able to lift 20 lbs. Regular talking, hearing and seeing required in the normal course of performing the job. Common eye, hand and finger dexterity required to perform various essential functions. Mental application utilizes memory for details, listening, verbal instructions, emotional stability, discriminating thinking and creative problem solving. Frequent travel required in normal course of job performance.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director



Date

6/14/19



# North Central Regional Transit District Job Description

<b>Title:</b>	Facilities Maintenance Specialist	<b>Code:</b>	355
<b>Division:</b>	Field Operations	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs a **variety of journey level skilled duties** related to the day-to-day upkeep, maintenance, repair, remodeling and construction of district equipment and facilities. Assist Fleet and Operations on an "As Needed" basis.

SUPERVISION RECEIVED

Works under the general supervision of the Fleet & Facilities Maintenance Manager.

SUPERVISION EXERCISED

May provide close to immediate supervision to less experienced facilities maintenance staff while in training or on a project by project basis.

ESSENTIAL FUNCTIONS

Diagnoses problems and makes repairs or replaces worn or defective equipment parts; and performs construction and remodeling work on District buildings, premises, and property.

Leads and performs preventative maintenance on environmental systems; replaces or cleans filters; performs routine maintenance on HVAC systems; cleans and/or repairs vents and ducts; maintains and/or replaces thermostats.

Repairs and maintains building fixtures, furniture, electrical, and plumbing systems; diagnoses failures in equipment and initiates necessary repairs; repairs and maintains toilets, sinks, water fountains, and drainage pipes; replaces or repairs electrical switches, fixtures, and related systems; replaces parts in any motorized or electrical machinery; replaces or installs doors, locks, windows, and related hardware.

Ensures that all buildings safety features are operational; inspects fire extinguishers as scheduled; checks alarm and/or sprinkler systems; assists in maintaining building security system and procedures; checks for and reports signs of vandalism, theft, or break-ins.

Inspects and evaluates physical condition of establishment; maintains grounds and landscaping at various District facilities including shelters and bus stops; coordinates bus stop maintenance and grooming, assesses needs and priorities, maintains all bus shelters, signage, and trash receptacles; pickups all trash at all shelters; insure that all shelter areas are free of weeds and trash; performs snowplowing of parking lots and bus pull outs as needed; shoveling snow from sidewalks and shelters as needed.

Performs routine administrative duties; periodically inventories maintenance supplies and equipment, and investigates new and improved maintenance processes; assists in establishing repair priorities.

Performs general record keeping; records completed maintenance tasks on work orders; uses a computer terminal for data entry, inquiries, and modification; safely operates all electrical and air powered tools, pipe fitting, welding, hydraulic, pneumatic, and other mechanical tools, snow removal equipment and/or other equipment as assigned; handles hazardous materials safely; conforms to all safety regulations and practices.

Assists with various fleet operations, shuttles buses to various destinations, performs light maintenance and repairs; assists to modify bus features, i.e., welds and fabricates bike racks, ski racks, etc.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:
    - A. Graduation from high school or GED;
- AND

B. Five (5) years of progressively responsible experience in industrial maintenance mechanics or in building construction trades (carpentry, painting, plumbing, heating and air conditioning);

OR

C. An equivalent combination of education and experience related to "rolling stock" management.

Facilities Maintenance Specialist, page 2

2. Knowledge, Skills and Abilities:

**Considerable Knowledge of** building safety and security codes and OSHA standards and requirements; occupational hazards and the necessary safety precautions applicable to vehicle and building maintenance work electrical circuits and devices related to building maintenance; the operation and repair of environmental control systems and related building equipment; plumbing, electrical, and carpentry methods; safety procedures and ability to follow safe working practices; pertinent District functions, policies, rules and regulations;

**Some Skill in** maintenance of electric motors, pumps, HVAC systems, etc.; use of miscellaneous hand and power tools for carpentry, painting, plumbing, electrical work, basic mechanics, basic electrical and plumbing operations, basic carpentry and masonry.

**Ability to** repair and maintain environmental control systems and plumbing and electrical systems; repair and maintain furniture, doors, windows, and related hardware; use hand and power tools, safety equipment, and related maintenance equipment; maintain adequate maintenance and supplies and equipment; read, write, and do math at the 12th grade level; follow instructions; coordinate maintenance and projects; establish and maintain effective working relationships; read and understand at the appropriate level technical manuals, schematics, blueprints and technical trade code books pertaining to facilities and equipment serviced; conduct self in an appropriate manner as a representative of the NCRTD working effectively in a diverse work environment.

3. Special Qualifications:

Must be able to obtain a CDL Class B license with passenger (P) and air brake endorsement within six months of employment with the District. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing.

4. Work Environment:

Tasks require variety of physical activities generally involving muscular strain, such as walking, standing, stooping, sitting, reaching, lifting, etc. (occasionally move up to 50 pounds). Talking, hearing and seeing essential to the performance of the job. The work environment is generally 50% indoors in a temperature-controlled office and 50% outdoors in various weather conditions; some travel is required. Noise level in the work environment is usually moderate but on occasion may be exposed to loud noises when diagnosing problems or making repairs. While performing the duties of this job, the employee works near moving equipment and vehicles and is exposed to risk. May be required to work in confined spaces and wear personal protective equipment or respirator to protect against exposure to loud noises and exposure to hazardous materials. Common eye, hand, finger dexterity is required. Mental application utilizes memory for details, verbal instructions, discriminating thinking. Occasional local travel required in normal course of job performance.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director: Anthony J. M. Alvaro Date 06/14/2019



# North Central Regional Transit District Job Description

<b>Title:</b>	Facilities Maintenance Worker	<b>Code:</b>	360
<b>Division:</b>	Facilities Operations	<b>Effective Date:</b>	04/13
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs a **variety of semi-skilled duties** related to the day-to-day upkeep, maintenance, repair, remodeling and construction of district facilities. Assists Facilities Maintenance Specialist in all aspects of facilities maintenance, repairs and cleaning of District buildings, premises and property. Assist Fleet and Operations on an "As Needed" basis.

SUPERVISION RECEIVED

Works under the general supervision of the Facilities & Fleet Maintenance Manager. May receive technical or functional supervision from higher level staff as assigned.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Assists Fleet/Facilities Manager in shuttling buses to and from repair facilities. Safely operates a variety of vehicles and buses to and from repair facilities when repairs and servicing is required on the entire NCRTD fleet. Washes fleet vehicles and details interiors of all fleet vehicles as required.

Assists Facilities Maintenance Specialist in performing preventative maintenance on environmental systems. Assists with replacing or cleaning filters of building HVAC equipment. Assists with cleaning vents and ducts.

Assists Facilities Maintenance Specialist in repairing and maintaining building fixtures and furniture. Assists in repairs and maintenance of toilets, sinks, water fountains, and drainage pipes. Assists in replacing or installing doors, locks, windows, and related hardware. Assists with replacement of burned out or non-functioning lighting fixtures both internally and externally.

Assists in maintaining buildings safety features. Documents fire extinguishers inspections. Ensures security systems are functional and operating. Checks for and reports signs of vandalism and theft.

Cleans and maintains District's properties. Maintains grounds and landscaping at various District facilities including shelters and bus stops. Performs inspection of and maintains all bus shelters, signage, and trash receptacles. Pressure washes shelters and replaces panels as needed. Pickups trash at all shelters. Ensure that all shelter areas are free of weeds and trash. Installs information in shelter kiosks and multi-sided displays and repairs as needed. Snowplowing of parking lots and bus pull outs as needed; shoveling snow from sidewalks and shelters as needed.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:
  - A. Graduation from high school or GED;
  - AND
  - B. One (1) year of driving experience in the Transit or School Bus industry and general landscaping, labor, trash and snow removal procedures for the duties and functions listed under "Knowledge, Skills and Abilities;
  
2. Knowledge, Skills and Abilities:
 

**Some Knowledge** of basic method and proper and efficient use of hand and power tools, materials and equipment used in maintenance and construction trades; safety procedures;

**Some Skill** in the tools and performance of the tasks for the various maintenance and cleaning tasks.

**Ability to safely operate all power washers, electrical, air and gas-powered tools, mechanical tools, snow removal equipment and/or other equipment as assigned; handle hazardous materials safely; conform to all safety regulations and practices; quickly learn and apply pertinent District functions, policies, rules and regulations; perform heavy and sustained manual labor; operate vehicles while observing legal and defensive driving practices; use hand and power tools, safety equipment, and related maintenance equipment; maintain adequate maintenance and supplies and equipment; read, writes, and do math at the 12th grade level; effectively follow oral and written instructions; establish and maintain effective working relationships; conduct self in an appropriate manner as a representative of the NCRTD working effectively in a diverse work environment; complete basic work activity records and time reports; learn and effectively perform maintenance techniques specific to work assignments; work independently in the temporary absence of supervision.**

3. Special Qualifications:

Must be available to work outside regular business hours, as required by the demands of the job. Must be able to obtain a CDL Class B license with passenger (P) and air brake endorsement within six months of employment with the District. Demonstrate regular and reliable attendance. Project a positive image and support for the NCRTD at all times.

4. Work Environment:

Tasks require variety of physical activities generally involving muscular strain, such as walking, standing, stooping, sitting, reaching, lifting, etc. (occasionally move up to 50 pounds). Talking, hearing and seeing essential to the performance of the job. Tasks require sufficient manual dexterity with or without reasonable accommodation, which permits the employee to operate hand equipment, feel objects or controls and make adjustments to equipment. The work environment is generally 15% indoors in a temperature-controlled office and 85% outdoors in various weather conditions; some travel is required. Noise level in the work environment is usually moderate but on occasion may be exposed to loud noises while utilizing cleaning tools. While performing the duties of this job, the employee works near moving equipment and vehicles and is exposed to risk. May be required to work in confined spaces and wear personal protective equipment or respirator to protect against exposure to loud noises and exposure to hazardous materials.

5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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Approved by Executive Director: Anthony J. Morille Date 06/14/2019



# North Central Regional Transit District Job Description

<b>Title:</b>	Fleet Technician	<b>Code:</b>	371
<b>Division:</b>	Fleet Maintenance	<b>Effective Date:</b>	07/15
<b>Department:</b>	Operations	<b>Last Revised:</b>	07/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs a variety of **Working level skilled tasks** related to the maintenance, service, repair, and rebuilding of light or heavy-duty mechanized vehicles, engines and equipment, and transit fleet maintenance program.

SUPERVISION RECEIVED

Works under the general supervision of the Fleet Maintenance Foreman or the Fleet & Facilities Maintenance Manager.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

**Operations Functions:** Tests, services and repairs vehicles and mechanical equipment; performs trouble shooting and analysis of malfunctions using various technical and computerized testing and calibration equipment (diagnostic computers, scanners, scopes, battery testers, etc.) as needed to assure safe and efficient operation of District vehicles and equipment.

Inspects malfunctioning vehicles and equipment, determines source of malfunction/problem and make necessary repairs and adjustments to automobiles, trucks, vans and various light and heavy transit equipment.

Performs preventative maintenance and makes repairs to equipment; maintains engines (diesel and gas), transmissions, differentials, and other essential mechanical systems (I.E. cooling, charging, air, brake, suspension, computerized control, fuel, electrical, A/C, etc.); performs emergency field repairs and service; operates equipment for mechanical testing purposes; services and replaces equipment parts such as radiators, generators, distributors, brakes and clutches as required; assists in the minor repair of damaged body frames, brakes drums and rotors.

Disassembles and repairs engines, automatic & manual transmissions, transfer cases and differentials; repairs or replaces oil and air filters, carburetors, fuel pumps, and other necessary parts; adjusts brakes and any other necessary adjustable components or pieces.

Installs, maintains and repairs electrical systems, components, parts, accessories and equipment; assures proper function of radios, communication devices, lights and other electrical components.

Fabricates tools, equipment and parts not readily available; performs extensive metal fabrication, welding, cutting and design of necessary equipment.

Conducts various analyses and inspections of equipment and mechanical systems to determine the most cost-effective means of maintenance, replacement or repair; performs general equipment inspections and certifications; checks and maintains service schedules consistent with manufacturer specifications.

May order replacement parts and supplies; performs periodical inventories of parts, supplies, and equipment; investigates new or improved maintenance processes or procedures.

Performs general record keeping; records completed maintenance and repairs on work orders; uses a computer terminal for data input and review.

Performs Road calls/repairs to include tire and wheel assembly replacement as needed.

Performs other related duties as required.

#### MINIMUM QUALIFICATIONS

1. Education and Experience:

A. Graduation from high school or GED; plus, two (2) years of specialized technical or vocational training related to above duties;

AND

B. Four (4) years of skilled Technician experience in maintenance and repair of gasoline and diesel engines;

OR

C. An equivalent combination of education and experience related to "rolling stock" management.

2. Knowledge, Skills and Abilities:

**Working knowledge** of the design, adjustment, operation, maintenance, and repair of diversified mechanical and electrical equipment including light, medium, and heavy gasoline and diesel engines; hydraulics, generators, and welding; materials and tools used in equipment maintenance; hazards and safety precautions common to municipal maintenance and repair activities; installation and repair of automotive air conditioning systems; welding methods and procedures; servicing and repair of air brakes and air systems; auto electrical systems and equipment; gas and arc welding.

**Working level skills** in the use of mechanical tools, materials, welding, and testing equipment.

**Ability to** read and interpret maintenance manuals, parts books, and mechanical drawings; diagnose complex and non-routine mechanical and electrical defects and determine parts and adjustments necessary to repair equipment; communicate effectively, verbally, and in writing; establish and maintain effective working relationships with employees of the department, serves as back up driver for transit system.

3. Special Qualifications:

Must be able to obtain a CDL Class B license with passenger (P) and air brake endorsement within six months of employment with the District and a satisfactory driving record. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing, post-accident, pre-hire and return to duty testing.

Must be current or acquire within six (6) months the following ASE certification(s); H8 – Preventive Maintenance & Inspection (PMI), H4 – Brakes, H6 – Electrical/Electronic Systems May be a certified welder (ARC, MIG, overhead, Stick, etc.)

Maybe required to be on-call, work different shifts, holidays, weekends, and overtime as scheduled or requested.

4. Work Environment:

Employee occasionally works in outside weather conditions and occasionally works near moving mechanical parts and is occasionally exposed to wet and/or humid conditions. The employee occasionally is exposed to fumes or airborne particles, risk of electrical shock, and vibration. The employee is frequently exposed to toxic or caustic chemicals. Occasionally, tasks require a variety of physical activities, generally involving muscular strain, related to walking, standing, stooping, sitting, reaching, lifting (lifting and/or move up to 100 pounds and occasionally lift and/or move up to 150 pounds). Talking, hearing and seeing essential to performing required job functions. Common eye, hand and finger dexterity required to perform some essential functions. Mental application utilizes memory for details, verbal instructions, emotional stability, discriminating thinking and creative problem solving.

## 5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

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**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director:

*Anthony J. Marshall*

Date

*06/14/2019*



# North Central Regional Transit District

## Job Description

<b>Title:</b>	Vehicle Electronics Technician	<b>Code:</b>	375
<b>Division:</b>	Fleet	<b>Effective Date:</b>	07/2017
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/2019
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs a variety of **working level** technical electronic installations, repairs, modifications performing preventive maintenance on all electronic systems, components and computers on vehicles including, but not limited to, automatic fare collection equipment, communications equipment, ITS, ADA annunciators, Automatic Passenger Counters, security camera systems, Wheelchair lifts, Overhead signs, recorders and related equipment and other electronics.

SUPERVISION RECEIVED

Works under general supervision of the Fleet Maintenance Foreman and/or Fleet & Facilities Maintenance Manager

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Essential Functions are not intended to be an exhaustive list of all responsibilities, duties and skills. They are intended to be accurate summaries of what the job classification involves and what is required to perform it. Employees are responsible for all other duties as assigned.

Installs, maintains, tests, diagnoses, repairs, calibrates, reprograms, and adjusts electronic and related mechanical equipment and/or systems on vehicles. Plans and executes preventive maintenance schedules on said equipment and systems.

Performs preventive and corrective maintenance, troubleshooting, repair and adjustment at the system, board, card, and discrete component level on various electronic systems and components including those associated with security systems monitoring, ADA announcement, Automatic Passenger Counters, communications, door control, lighting and auxiliary electrical supply as well as those found in auxiliary equipment such as destination signs and automatic fare equipment; troubleshoots, maintains, adjusts and programs microprocessors found in such equipment.

Maintains a test bench and associated equipment; maintains appropriate supplies for timely repair of equipment; orders, receives, inspects, inventories and stocks repair parts, diagnostic equipment and tools.

Prepares work orders to document repair history of equipment; prepares and maintains records of work performed and parts and materials used; and, submits reports as required, using Assist Software or another electronic data computer.

Recommends improvements and works with supervisor and other maintenance staff regarding modifications; uses diagnostic test equipment and precision measuring devices during the assigned work, including automated test equipment (ATE). Verifies performance of new or modified systems or equipment.

Reads and interprets diagrams, engineering drawings, manuals, schematics and work orders and wire diagrams.

Measures, tests and inspects completed work to confirm adherence to specifications.

Participates in establishing long-term Department goals and ensures compliance with Federal IT/IS goal requirements. Participates in aligning IT/IS solutions to district needs.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:

- A. Graduation from high school; plus, two (2) years of specialized training or an associate degree in vehicle electronics or related field;

AND

- B. Four (4) years of experience in the installation, maintenance or repair of electronic systems and components, including communications components and microprocessor systems.

OR

- C. An equivalent combination of education and experience.

2. Knowledge, Skills and Abilities:

**Working Knowledge of** basic operating principles of analog and digital electronics, electrical and electronic circuitry, and associated mechanical mechanisms; maintenance, repair and programming of electronic micro-processing systems; methods, equipment and materials used in the secondary maintenance and repair of a variety of electronic and electromechanical systems, components and equipment; use and care of test equipment and power and hand tools of the trade; troubleshooting and diagnostic techniques; shop arithmetic as required for the trade; and safety practices and procedures pertaining to the work.

**Skill in** diagnosing and repairing operational problems in a variety of electronic systems, components and equipment at the system, board and card level including microprocessors; performing preventive maintenance on and modifications to electronic systems and components; reading and interpreting engineering schematics, drawings, diagrams, manuals and work orders; using and maintaining hand and power tools and testing equipment of the trade, to include automated test equipment (ATE).

**Ability to** understand and follow oral and written directions; maintain accurate records of work performed and materials used; establish and maintain effective working relationships with those contacted in the course of the work; develop a strong understanding and proficiency in the technology equipment used in Transit operations and maintenance including Avail software and hardware, Apollo camera systems, and facility security systems.

3. Special Qualification:

Must be able to obtain a CDL Class B license with passenger (P) and air brake endorsement within six months of employment with the District with a satisfactory driving record. Demonstrated skill in computer software programs including MS Word, Excel, Outlook, and PowerPoint. Must be able to work with no advance notice additional hours, evenings, on-call, holidays and weekends and be able to travel. Demonstrate regular and reliable attendance. Project a positive image and support for the NCRTD at all times. This position is deemed to be a safety sensitive position under FTA drug and alcohol regulations, and therefore is subject to random drug testing.

4. Work Environment:

The work environment characteristics described here are representative of those an employee encounter while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The employee works in an environment which is generally 50% indoors in a temperature-controlled office and 50% outdoors in various weather conditions; some travel is required. Noise level in the work environment is usually moderate but on occasion may be exposed to loud noises when diagnosing problems or making repairs. While performing the duties of this job, the employee works near moving equipment and vehicles and is exposed to risk. May be required to work in confined spaces and wear personal protective equipment or respirator to protect against exposure to loud noises and exposure to hazardous materials.

Work is performed mainly in a shop environment with some field work including outside work with exposure to inclement weather conditions. Must be able to work various shifts, weekends, holidays and overtime.

Must be able to lift and carry equipment weighing up to 75 lbs. Squatting, kneeling, stooping, climbing and bending may be required for extended periods. Must possess color vision to distinguish parts and wiring.

Sufficient clarity of speech and hearing or other communication capabilities, with or without reasonable accommodation, which permits the employee to discern verbal instructions, communicate effectively, hear within the normal range of conversation, speak clearly and concisely, and carry on telephone communication.

Sufficient vision or other powers of observation, with or without reasonable accommodation, which permits the employee to comprehend written work instructions; comprehend, prepare, and review a wide variety of written and electronic materials at arm's length or less (distinguish colors, letters and numbers); and to see in detail objects or printed material at greater than arm's length.

Sufficient manual dexterity with or without reasonable accommodation, which permits the employee to write reports, operate hand equipment, feel objects or controls and make adjustments to equipment.

Sufficient personal mobility, flexibility, and physical reflexes, with or without reasonable accommodation, which permits the employee to bend or stoop repeatedly, sit, walk or stand for long periods of time, lift up to 75 pounds, and work in a field environment; and frequently stoop, crouch, kneel or bend.

Must possess the mobility necessary to transport oneself to other locations within the District, as required by the needs of the position.

## 5. Professional Standards:

At North Central Regional Transportation District, we offer services as a team of respectful, qualified professionals. Our customers come first. They are our neighbors. We believe that the following Professional Standards are crucial for you to embody if we are going to be a match as employer and employee.

In addition to being competent in the essential functions outlined above and minimum qualifications outlined above, you have an important professional role to play in NCRTD. To fill that role, you are expected to practice and exhibit the following attitudes and behaviors while at work.

- Remain a professional, balanced, respectful, problem-solver, even under stress or when out of your comfort zone.
- Demonstrate trustworthy behavior and speech (personal integrity and professional competence, do what you say you will do, be dependable, be accountable, act as a contributing member of our professional team).
- Show respect for coworkers and customers (be attentive, recognize others' contributions and concerns, maintain the dignity of all people, empathize, honor differences, build rapport when possible and forgiveness where necessary).
- Keep a positive, "can do" attitude toward tasks, coworkers, management and customers.
- Communicate coherently (listen to understand, speak to be understood, no blaming, ask questions).
- Demonstrate flexibility in the face of changes and new ideas (understand why changes are being made, ask questions about them when necessary, give them a chance and offer feedback where appropriate).
- Be a steward (1) of our organization's resources (avoid waste, suggest cost saving ideas, take care of things by keeping them clean and the area safe); and (2) of your personal career (identify one or two areas of growth, learning or certification to pursue every year).

\*\*\*\*\*

**Disclaimer:** The above statements describe the general nature, level, and type of work performed by the incumbent(s) assigned to this classification. They are not intended to be an exhaustive list of all responsibilities, demands, and skills required of personnel so classified. Job descriptions are not intended to and do not imply or create any employment, compensation, or contract rights to any person or persons. Management reserves the right to add, delete, or modify any and/or all provisions of this description at any time as needed without notice. This job description supersedes earlier versions.

Approved by Executive Director:

*Anthony J. Matthews*

Date

*06/14/2019*



# North Central Regional Transit District Job Description

<b>Title:</b>	Custodian	<b>Code:</b>	395
<b>Division:</b>	Facilities	<b>Effective Date:</b>	04/19
<b>Department:</b>	Operations	<b>Last Revised:</b>	04/19
<b>FLSA Status: Non-Exempt</b>			

GENERAL PURPOSE

Performs a variety of routine unskilled and semi-skilled tasks related to maintaining district facilities, including heavy cleaning duties.

SUPERVISION RECEIVED

Works under the general supervision of the Fleet & Facilities Manager.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

Performs a variety of custodial duties to keep District facilities in a clean and orderly condition, including, cleaning floors, washing walls and glass, and removing trash; wet or dry mopping of the floors, cleaning the bathrooms, vacuuming carpets, dusting furniture; identifies repair needs and informs management.

Performs daily cleaning of common and high traffic areas, including foyer, conference rooms, board room, break room and kitchen areas, printing area and all hallways and common areas as well as entrance / exit areas

Performs daily cleaning of restroom facilities; two (2) women's and two (2) men's and one unisex.

Performs daily cleaning of offices and board room.

Performs various weekly duties, i.e., dusting windowsills and wall picture frames; dusting and disinfecting vertical surfaces of desks, file cabinets, chairs, tables, and other office furniture; vacuum carpeting, including under desks, chairs, tables, etc.; cleaning hard surface; cleaning and dry polishing glass surfaces.

Performs various monthly duties, i.e., performs high dusting (below 8 feet); vacuums upholstered furniture, including board room chairs, and window roller blinds; damp wipes window frames and picture frames; cleans windows inside and outside.

Monitors and requests the purchase requisitions for cleaning supplies and equipment necessary to perform duties.

Performs other related duties as required.

MINIMUM QUALIFICATIONS

1. Education and Experience:
  - A. Sufficient education to demonstrate an aptitude to perform above and related duties;
  - AND
  - B. Sufficient experience to demonstrate an ability to perform above and related duties.

2. Knowledge, Skills and Abilities:

**Some Knowledge** of customer service principles and processes for providing good customer service, i.e., customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction; English Language structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.

**Some skill** in self-motivation, time management and identifying best practices for completion of custodial assignments.

**Ability** to communicate information and ideas so other will understand; listen to and understand information, direction and ideas presented through spoken words and sentences; see details at close range (within a few feet of the observer); tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem; speak clearly so others can understand.



- (g) Hiring procedures (ie) background check, driving record, valid **driver's** license  
**Drivers must fulfill requirements listed in job description.**
- (h) Training Plan/Record Keeping Policy and Procedures  
**Refer to Records and Email Retention Policy in section 3.**
- (i) Code of Conduct Policy  
**Refer to Code of Conduct Policy in section 3.**
- (j) Drug & Alcohol Policy for Safety Sensitive Employees  
**See next pages.**

NCRTD

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# Drug and Alcohol Policy

Effective as of September 8, 2017

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Adopted by: NCRTD Board of Directors

Date Adopted: 9/8/17

Last Revised: 11/4/11

## I. Purpose of Policy

This policy complies with 49 CFR Part 655, as amended and 49 CFR Part 40, as amended. Copies of Parts 655 and 40 are available in the drug and alcohol program manager's office and can be found on the internet at the Federal Transit Administration (FTA) Drug and Alcohol Program website <http://transit-safety.fta.dot.gov/DrugAndAlcohol/>.

All covered employees are required to submit to drug and alcohol tests as a condition of employment in accordance with 49 CFR Part 655.

Portions of this policy are not FTA-mandated, but reflect NCRTD's policy. These additional provisions are identified by **bold text**.

In addition, DOT has published 49 CFR Part 29, implementing the Drug-Free Workplace Act of 1988, which requires the establishment of drug-free workplace policies and the reporting of certain drug-related offenses to the FTA.

The unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the covered workplace. An employee who is convicted of any criminal drug statute for a violation occurring in the workplace shall notify the Human Resources Director no later than five days after such conviction.

## 2. Covered Employees

**This is the policy of the North Central Regional Transit District which shall hereinafter be referred to as the NCRTD or the "District."**

This policy applies to every person, including an applicant or transferee, who performs or will perform a "safety-sensitive function" as defined in Part 655, section 655.4. **and such additional employees as may be subjected to the policy under state and local law to the extent that they further define the term "safety-sensitive."**

You are a covered employee if you perform any of the following:

- Operating a revenue service vehicle, in or out of revenue service

- Operating a non-revenue vehicle requiring a commercial driver's license
- Controlling movement or dispatch of a revenue service vehicle
- Maintaining (including repairs, overhaul and rebuilding) of a revenue service vehicle or equipment used in revenue service
- Carrying a firearm for security purposes

See Attachment A for a list of covered positions by job title.

**In addition, the provisions regarding pre-employment testing shall apply to all employees of the District.**

### 3. Prohibited Behavior

Use of illegal drugs is prohibited at all times. All covered employees are prohibited from reporting for duty or remaining on duty any time there is a quantifiable presence of a prohibited drug in the body above the minimum thresholds defined in Part 40. Prohibited drugs include:

- marijuana
- cocaine
- phencyclidine (PCP)
- opiates
- amphetamines

All covered employees are prohibited from performing or continuing to perform safety-sensitive functions while having an alcohol concentration of 0.04 or greater.

**If the North Central Regional Transit District has actual knowledge of the use of alcohol while the employee is performing safety-sensitive functions, the employee will not be permitted to continue to perform the safety sensitive duty.**

All covered employees are prohibited from consuming alcohol while performing safety-sensitive job functions or while on-call to perform safety-sensitive job functions. If an on-call employee has consumed alcohol, they must acknowledge the use of alcohol at the time that they are called to report for duty. If the on-call employee claims the ability to perform his or her safety-sensitive function, he or she must take an alcohol test with a result of less than 0.02 prior to performance.

All covered employees are prohibited from consuming alcohol within four (4) hours prior to the performance of safety-sensitive job functions.

All covered employees are prohibited from consuming alcohol for eight (8) hours following involvement in an accident or until he or she submits to the post-accident drug and alcohol test, whichever occurs first.

#### **A. Manufacture, Trafficking, Ingestion, and Use**

**Any employee engaging in the manufacture, distribution, dispensing, possession or use of prohibited substances on North Central Regional Transit District premises, in public transit vehicles, in uniform or while on business related to a public transportation system will be subject to disciplinary action up to and including termination. Ingestion of stated drugs is prohibited at all times. Law enforcement shall be notified, as appropriate, where criminal activity is suspected.**

**B. Notification of Criminal Drug Conviction**

**All employees are required to notify the transit system of any criminal drug statute conviction for a violation occurring in the workplace within five days after such conviction. Failure to comply with this provision shall result in disciplinary action, up to and including termination. Any safety sensitive employee must also report any circumstances where there was a criminal conviction or loss of driving privileges due to drug or alcohol misuse within 5 days of such conviction or loss of privileges.**

**C. Supervisory Action Following a Positive Test**

**Any time that the NCRTD performs a test and the tested individual tests positive or refuses the test the supervisor responsible for the employee shall make reasonable efforts to provide assistance to the employee in obtaining transportation needed for the employee to safely travel to his or her non-work destination and to make arrangements for recovering or removing any privately owned vehicle that may be upon NCRTD property at the employee's sole cost and expense. The NCRTD will not prohibit or interfere in the tested employees ownership, use or operation of privately owned vehicles but may alert law enforcement if it has reason to believe that the employee intends to operate a vehicle while impaired.**

## **4. Consequences for Violations**

Following a positive drug or alcohol (BAC at or above 0.04) test result or test refusal, the employee will be immediately removed from safety-sensitive duty and referred to a Substance Abuse Professional.

Following a BAC of 0.02 or greater, but less than 0.04, the employee will be immediately removed from safety-sensitive duties for at least eight hours unless a retest results in the employee's alcohol concentration being less than 0.02.

### **Zero Tolerance**

Per NCRTD policy, any employee who tests positive for drugs or alcohol (BAC at or above 0.04) or refuses to test will be referred to a Substance Abuse Professional (SAP) **and terminated from employment pursuant to the District's personnel rules and regulations and subject to such additional procedural requirements as may be imposed by the District or pursuant to a valid collective bargaining agreement.**

## 5. Circumstances for Testing

### Pre-Employment Testing

Pre-employment alcohol tests are conducted after making a contingent offer of employment or transfer. All pre-employment alcohol tests will be conducted using the procedures set forth in 49 CFR Part 40.

A negative pre-employment drug test result is required before an employee can first perform safety-sensitive functions. If a pre-employment test is cancelled, the individual will be required to undergo another test and successfully pass with a verified negative result before performing safety-sensitive functions.

If a covered employee has not performed a safety-sensitive function for 90 or more consecutive calendar days, and has not been in the random testing pool during that time, the employee must take and pass a pre-employment test before he or she can return to a safety-sensitive function.

A covered employee or applicant who has previously failed or refused a DOT pre-employment drug and/or alcohol test must provide proof of having successfully completed a referral, evaluation, and treatment plan meeting DOT requirements.

### Reasonable Suspicion Testing

All covered employees shall be subject to a drug and/or alcohol test when NCRTD has reasonable suspicion to believe that the covered employee has used a prohibited drug and/or engaged in alcohol misuse. A reasonable suspicion referral for testing will be made by a trained supervisor or other trained company official on the basis of specific, contemporaneous, articulable observations concerning the appearance, behavior, speech, or body odors of the covered employee.

Covered employees may be subject to reasonable suspicion drug testing any time while on duty. Covered employees may be subject to reasonable suspicion alcohol testing while the employee is performing safety-sensitive functions, just before the employee is to perform safety-sensitive functions, or just after the employee has ceased performing such functions. **The NCRTD will provide transportation to and from all testing and employees refusal to accept transportation by and from the NCRTD shall be deemed a refusal to test.**

### Post-Accident Testing

Covered employees shall be subject to post-accident drug and alcohol testing under the following circumstances:

#### Fatal Accidents

As soon as practicable following an accident involving the loss of a human life, drug and alcohol tests will be conducted on each surviving covered employee operating the public transportation vehicle at the time of the accident. In addition, any other covered employee whose performance

could have contributed to the accident, as determined by NCRTD using the best information available at the time of the decision, will be tested.

#### Non-fatal Accidents

As soon as practicable following an accident not involving the loss of a human life, drug and alcohol tests will be conducted on each covered employee operating the public transportation vehicle at the time of the accident if at least one of the following conditions is met:

- (1) The accident results in injuries requiring immediate medical treatment away from the scene, unless the covered employee can be completely discounted as a contributing factor to the accident
- (2) One or more vehicles incurs disabling damage and must be towed away from the scene, unless the covered employee can be completely discounted as a contributing factor to the accident
- (3) The vehicle is a rail car, trolley car or bus, or vessel, and is removed from operation, unless the covered employee can be completely discounted as a contributing factor to the accident

In addition, any other covered employee whose performance could have contributed to the accident, as determined by NCRTD using the best information available at the time of the decision, will be tested.

A covered employee subject to post-accident testing must remain readily available, or it is considered a refusal to test. Nothing in this section shall be construed to require the delay of necessary medical attention for the injured following an accident or to prohibit a covered employee from leaving the scene of an accident for the period necessary to obtain assistance in responding to the accident or to obtain necessary emergency medical care.

**The NCRTD will provide transportation to and from all testing and employees refusal to accept transportation by and from the NCRTD shall be deemed a refusal to test.**

## Random Testing

Random drug and alcohol tests are unannounced and unpredictable, and the dates for administering random tests are spread reasonably throughout the calendar year. Random testing will be conducted at all times of the day when safety-sensitive functions are performed.

Testing rates will meet or exceed the minimum annual percentage rate set each year by the FTA administrator. The current year testing rates can be viewed online at [www.transportation.gov/odapc/random-testing-rates](http://www.transportation.gov/odapc/random-testing-rates).

The selection of employees for random drug and alcohol testing will be made by a scientifically valid method, such as a random number table or a computer-based random number generator. Under the selection process used, each covered employee will have an equal chance of being tested each time selections are made.

A covered employee may only be randomly tested for alcohol misuse while the employee is performing safety-sensitive functions, just before the employee is to perform safety-sensitive functions, or just after the employee has ceased performing such functions. A covered employee may be randomly tested for prohibited drug use anytime while on duty.

Each covered employee who is notified of selection for random drug or random alcohol testing must immediately proceed to the designated testing site.

### Random Testing – End of Shift

Random testing may occur anytime an employee is on duty so long as the employee is notified prior to the end of the shift. Employees who provide advance, verifiable notice of scheduled medical or child care commitments will be random drug tested no later than three hours before the end of their shift and random alcohol tested no later than 30 minutes before the end of their shift. Verifiable documentation of a previously scheduled medical or child care commitment, for the period immediately following an employee's shift, must be provided at least 30 minutes before the end of the shift.

## 6. Testing Procedures

**All testing shall be performed by an independent contractor of the NCRTD following all federally mandated, state and local procedures.**

All FTA drug and alcohol testing will be conducted in accordance with 49 CFR Part 40, as amended.

### Dilute Urine Specimen

**If there is a negative dilute test result, NCRTD will accept the test result and there will be no retest,** unless the creatinine concentration of a negative dilute specimen was greater than or equal to 2 mg/dL, but less than or equal to 5 mg/dL.

Dilute negative results with a creatinine level greater than or equal to 2 mg/dL but less than or equal to 5 mg/dL require an immediate recollection under direct observation (see 49 CFR Part 40, section 40.67).

### Split Specimen Test

In the event of a verified positive test result, or a verified adulterated or substituted result, the employee can request that the split specimen be tested at a second laboratory. NCRTD guarantees that the split specimen test will be conducted in a timely fashion. The employee shall be required to pay for the test. However, analysis shall not be conditioned upon the employee's payment.

## 7. Test Refusals

As a covered employee, you have refused to test if you:

- (1) Fail to appear for any test (except a pre-employment test) within a reasonable time, as determined by NCRTD.
- (2) Fail to remain at the testing site until the testing process is complete. An employee who leaves the testing site before the testing process commences for a pre-employment test has not refused to test.
- (3) Fail to attempt to provide a breath or urine specimen. An employee who does not provide a urine or breath specimen because he or she has left the testing site before the testing process commenced for a pre-employment test has not refused to test.
- (4) In the case of a directly-observed or monitored urine drug collection, fail to permit monitoring or observation of your provision of a specimen.
- (5) Fail to provide a sufficient quantity of urine or breath without a valid medical explanation.
- (6) Fail or decline to take a second test as directed by the collector or NCRTD for drug testing.
- (7) Fail to undergo a medical evaluation as required by the MRO or NCRTD's Designated Employer Representative (DER).
- (8) Fail to cooperate with any part of the testing process.
- (9) Fail to follow an observer's instructions to raise and lower clothing and turn around during a directly-observed test.
- (10) Possess or wear a prosthetic or other device used to tamper with the collection process.
- (11) Admit to the adulteration or substitution of a specimen to the collector or MRO.
- (12) Refuse to sign the certification at Step 2 of the Alcohol Testing Form (ATF).
- (13) Fail to remain readily available following an accident.

As a covered employee, if the MRO reports that you have a verified adulterated or substituted test result, you have refused to take a drug test.

As a covered employee, if you refuse to take a drug and/or alcohol test, you incur the same consequences as testing positive and will be immediately removed from performing safety-sensitive functions, and referred to a SAP.

## 8. Voluntary Self-Referral

**Any employee who has a drug and/or alcohol abuse problem and has not been selected for reasonable suspicion, random or post-accident testing or has not refused a drug or alcohol test may voluntarily refer her or himself to the Human Resources Director, who will refer the individual to a substance abuse counselor for evaluation and treatment.**

**The substance abuse counselor will evaluate the employee and make a specific recommendation regarding the appropriate treatment. Employees are encouraged to voluntarily seek professional substance abuse assistance before any substance use or dependence affects job performance.**

**Any safety-sensitive employee who admits to a drug and/or alcohol problem will immediately be removed from his/her safety-sensitive function and will not be allowed to perform such function until successful completion of a prescribed rehabilitation program.**

## 9. Prescription Drug Use

**The appropriate use of legally prescribed drugs and non-prescription medications is not prohibited but is subject to the District's Over-the Counter and Prescription Drug Policy. However, the use of any substance which carries a warning label that indicates that mental functioning, motor skills, or judgment may be adversely affected must be reported to the District's Human Resources Director. Medical advice should be sought, as appropriate, while taking such medication and before performing safety-sensitive duties. When possible, alternative substances should be requested from the prescribing physician. It is the employee's responsibility to inform the physician the nature of employee's job duties.**

## 10. Contact Person

For questions about NCRTD's anti-drug and alcohol misuse program, contact the District's Human Resources Director.

### Systems Contacts

**Any questions regarding details of the systems and application of this policy should contact the following North Central Regional Transit District's representative:**

- **Designated Employer Representative/Program Manager:**  
Michelle Jacquez – Operations Administrative Assistant  
1327 North Riverside Drive  
Española, New Mexico 87532  
505-629-4654
- **SAMHSA Certified Laboratory:**
  - Alere Labs  
1111 Newton Street  
Gretna, LA 70053

- Alere Labs  
450 Southlake Boulevard  
Richmond, VA 23236
- **Medical Review Officer:**  
Dr. Stephen Kracht  
8140 Ward Parkway, Suite 275  
Kansas City, MO 64114
- **SAP (Substant Abuse Provider):**
- Kim DuTremaine, LCSW, LADAC, SAP  
511 E. 20<sup>th</sup> Street  
Farmington, New Mexico 87504
- Sheena Bachelor-Evridge  
4601 Paradise Blvd NW Suite G  
Albuquerque, New Mexico 87411

## II. Information Disclosure

The North Central Regional Transit District will strictly adhere to all standards of confidentiality and assure all employees that testing records and results will be released only to those authorized by FTA rules to receive such information. All drug and alcohol testing records will be maintained in a secure manner so that disclosure of information to unauthorized persons does not occur. Privacy of each tested employee shall be strictly maintained. Information will only be released in the following circumstances:

1. to a third party only as directed by specific, written instruction of the employee;
2. to the decision-maker in a lawsuit, grievance, or other proceeding initiated by or on the behalf of the employee tested;
3. to a subsequent employer upon receipt of a written request from the employee;
4. to the National Transportation Safety Board during an accident investigation;
5. to the DOT or any DOT agency with regulatory authority over the employer or any of its employees, or to a State oversight agency authorized to oversee rail fixed-guideway systems; or
6. to the employee, upon written request.

Employees have the unqualified right to review their drug and alcohol testing records, to have access to information to dispute the results of any testing outcome, to have access to any pertinent records such as equipment calibration records and records of laboratory certifications.

Attachment A: Covered Positions

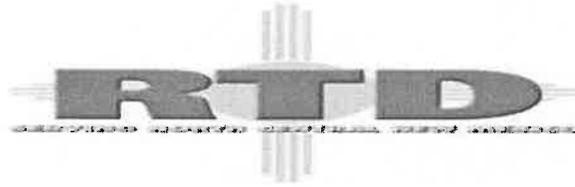
1. Operations Director
2. Fleet and Facilities Manager
3. Fleet Mechanic
4. Fleet and Facilities Maintenance Worker
5. Transit Vehicle Electronics Technician
6. Transit Supervisor
7. Transit Driver I
8. Transit Driver II
9. Transit Driver III / Lead
10. Customer Service Rep. I
11. Customer Service Rep. II
12. Lead Customer Service Rep. III //Driver II

## 5. Vehicle fleet

(e) Update in BlackCat

(f) Preventive maintenance schedules

**See next page. Completed every 6,000 miles.**



UNIT NO.: \_\_\_\_\_

MILEAGE: \_\_\_\_\_

DATE: 8/27/20

COMMERCIAL VENDOR PERFORMING INSPECTION: Point S (TIRE FACTORY)

**MULTI-POINT INSPECTION-PERFORMED AT EACH SERVICE INTERVAL OF VEHICLE**

SYMBOLS: √=OK, A=ADJUSTED, C=CLEANED, R=REPAIRED/REPLACED, L=LUBED, O=OTHER AS NEEDED  
X=NEEDS REPAIR, NA=NOT REQUIRED

TASK DONE	TASK DESCRIPTION				QTY.
	RTD SUPPLIED OIL FILTER NO.:				
	CHANGE ENGINE OIL AND FILTER	5W20	5W30	15W40	
	INSPECT AIR FILTER REPLACE IF NECESSARY	RTD AIR FILTER NO.:			
	CHECK TRANSMISSION FLUID LEVEL	RTD FUEL FILTER NO.:			
	SERVICE TRANSMISSION AT MULTIPLES OF 50,000 MILES				
	CHECK COOLANT LEVEL				
	CHECK WASHER FLUID FILL IF BELOW 3/4 FULL				
	CHECK BRAKE FLUID				
	CHECK POWER STEERING FLUID				
	INSPECT WINDSHIELD FOR PITS				
	INSPECT WIPER BLADES REPLACE IF NECESSARY				
	INSPECT SERPENTINE BELT(S)				
	INSPECT RADIATOR HOSES, HEATER HOSES AND AIR CONDITIONER LINES				
	INSPECT FOR DEBRIS BETWEEN CONDENSER AND RADIATOR				
	INSPECT FOR OIL AND FLUID LEAKS				
	INSPECT ENGINE BATTERY/TERMINALS/CABLES FOR CORROSION, CLEAN IF NECESSARY				
	INSPECT AUXILARY BATTERY/TERMINALS/CABLES FOR CORROSION, CLEAN IF NECESSARY				
	CHECK THE OPERATION OF HORN, EXTERIOR LIGHTS, TURN SIGNALS, HAZARD AND STOP LIGHTS				
	GREASE CHASSIS				
	CHECK DIFFERENTIAL OIL LEVEL				
	INSPECT EXHAUST SYSTEM AND HEAT SHIELDS, BRACKETS/HANGERS				
	INSPECT SUSPENSION SHOCKS/STRUTS				
	INSPECT STEERING LINKAGE, BALL JOINTS, DRIVESHAFT AND U-JOINTS				
	ROTATE AND BALANCE WHEELS/TIRES (Rotate single rear wheel only)				
	CHECK TIRE PRESSURE AND CONDITION OF TIRES/WHEELS: 4/32 FRONT MIN. 2/32 MIN. REAR TREAD DEPTH				
	INSPECT BRAKE SHOES/PADS/DRUMS/ROTORS (LIFE REMAINING) % FRONT % REAR				
	INSPECT WHEEL ENDS FOR END PLAY AND NOISE				
	CHECK AIR CONDITIONER FOR TEMPERATURE OUTPUT AND PERFORMANCE (Rear also as needed)				
	OPEN/INSPECT/LUBRICATE RUBBER MOLDINGS/SEALS ON ALL EMERGENCY WINDOWS/DOORS				
	CYCLE/INSPECT AND LUBRICATE WHEEL CHAIR LIFT WITH SILCONE SPRAY ON ALL PIVOT POINTS				
	REMARKS/OTHER REPAIRS NEEDED				

TECHNICIAN'S SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

(g) Pre/Post inspection procedures  
**See next page.**





- (h) Fleet Replacement Plan for FY 22  
**Contained in BlackCat.**

## 6. Accident/Incident Reporting Procedures

- (c) Procedures to include accident reporting and documentation in the corresponding vehicle inventory record in BlackCat  
**See next pages.**

## ACCIDENT HANDLING PROCEDURES

This procedure MUST be followed in the event of ALL accidents involving a NCRTD vehicle. No exceptions. Each driver involved in an accident, no matter how small is subject to Drug and Alcohol testing based on the decision of management. Depending on the circumstances of the accident a driver may be subject to disciplinary action up to and including termination.

### Driver Responsibility

1. Check your location. DO NOT move your vehicle unless you are instructed to do so by law enforcement or when leaving the vehicle where it is would expose the passengers to greater danger such as in a busy traffic lane, on a blind, curve, near the top of a hill, or because of weather.
2. Secure the vehicle by disengaging the transmission (place in PARK or NEUTRAL), setting the brakes, turning off the engine and turning on the four-way hazard flashers.
3. Make the decision to evacuate or not to evacuate the vehicle. EVACUATE IF NECESSARY.
4. Assess the condition of your passengers and **contact dispatch**\* providing the following information:
  - a. Exact Location, cross street, direction of travel
  - b. Type of emergency and exactly what has occurred
  - c. Number of passengers on the vehicle, number of wheelchair passengers and any injuries involved
  - d. What type of help you will need from law enforcement and emergency personnel
  - e. Whether-or-not you are blocking traffic and if the vehicle can be safely moved

**\*Dispatch will call 911, contact a Supervisor and Fleet Manager with relevant information and activate a Rider Alert.**

5. Respond to passenger needs and assist any injured passengers. (All drivers must be in possession of a current First Aid/CPR certification).
6. Inform all passengers of the situation, what actions you have taken and how they will be affected.
7. Request that all passengers and witnesses complete courtesy cards including their names, phone numbers and any other information they can provide. Collect the cards to turn in to management.
8. Cooperate with law enforcement and system management. By this time a NCRTD member of the management staff should be present. At this time they will handle the rest of the situation.
9. DO NOT assign blame or take responsibility for the accident.
10. DO NOT talk to the media, but instead refer the media to system management.

**The Responder in charge (Supervisor or Fleet Manager or Operations Director) on the scene will:  
OR if no Responder has arrived, driver will continue as instructed by Dispatch to:**

11. Get all necessary information from other drivers, law enforcement and emergency medical personnel including:

- a. License numbers of all other vehicle(s)
- b. Make, model, and color of other vehicle(s)
- c. Name, phone number and driver license number of other driver(s)
- d. Insurance carrier and policy number of other driver(s)
- e. Names of ambulance company and hospital to which injured were transported
- f. Name, department and badge number of responding law enforcement officer(s)
- g. Any other pertinent observations, including condition or behavior of other driver(s)

12. Complete all required accident report documentation as soon as possible.

13. Management is to determine whether-or-not drug and alcohol testing is required (using the Accident/Incident Documentation Form in the accident response folder). In the event of a minor incident management may determine testing is not required, but this decision must be documented as to why no testing was done. Drug and Alcohol testing MUST be performed in the event of 1) a fatality (No Exceptions) or 2) in the event the vehicle must be towed or 3) if someone receives medical attention away from the scene. The exception in cases 2 & 3 is: If the supervisor on the scene can determine that the driver's actions were not a contributing factor to the accident. Then no post-accident D&A testing is required but must document.

14. If responding management personnel is not the Transit Shift Supervisor, the responding management personnel is responsible for advising the Operations and Facilities Director as soon as possible, with complete written documentation, along with pictures of the damage to the NCRTD vehicle and the accident scene.

15. It will be determined by staff management if any disciplinary action regarding the transit operator will be taken. A transit operator may be suspended pending receipt of the drug and alcohol test, and a determination will be made as to termination based on the facts and circumstances of the accident and if any policies and procedures have been violated.

**The Responder in Charge will:**

16. Responder in charge will retrieve the police report, assemble all documentation and forward information to:

- Finance Director for NMSIF alerting of pending claims for repairs or injuries.
- Management Debrief Team\* for debriefing of the accident.

\*Management Debrief Team: Executive Director, Human Resources Director, Finance Director, Operations and Facilities Director, Fleet and Facilities Director, Public Information Officer and Supervisor involved or other Responder in Charge:

DATE OF REPORT: \_\_\_\_\_

AGENCY: \_\_\_\_\_

### VEHICLE ACCIDENT REPORT FORM

#### ABOUT THE ACCIDENT

Date of Accident \_\_\_\_\_ Time \_\_\_\_\_ A.M. Were You \_\_\_\_\_ Inbound  
\_\_\_\_\_ P.M. \_\_\_\_\_ Outbound

Veh. No. \_\_\_\_\_ Route Name \_\_\_\_\_ Driver \_\_\_\_\_ Age \_\_\_\_\_

Driver's ID No. \_\_\_\_\_ Address \_\_\_\_\_ Date of Birth \_\_\_\_\_

Location Of Accident \_\_\_\_\_

Road Condition \_\_\_\_\_ Weather \_\_\_\_\_

At What Distance Did You Notice The Impending Accident \_\_\_\_\_ Feet

What Was Your Speed \_\_\_\_\_ MPH What Was Your Speed At Impact \_\_\_\_\_ MPH

Approximate Distance Traveled After Impact \_\_\_\_\_ Feet

Did You Sound Horn \_\_\_\_\_

No. of Passengers On Board At Time Of Accident \_\_\_\_\_

Point Of Impact On Your Vehicle \_\_\_\_\_

Damage To Your Vehicle Confined To \_\_\_\_\_

#### NARRATIVE (DESCRIPTION OF ACCIDENT)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

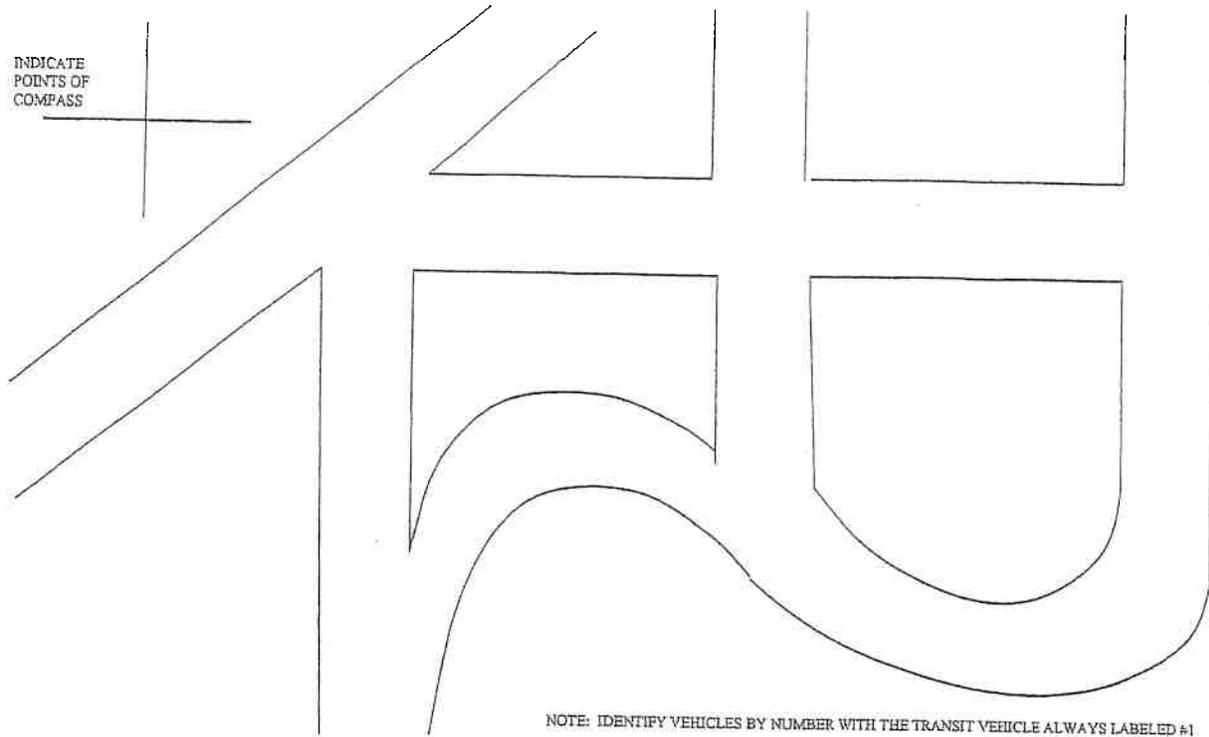
#### WITNESSES

Name _____	Address _____	Phone # _____
Name _____	Address _____	Phone # _____
Name _____	Address _____	Phone # _____
Name _____	Address _____	Phone # _____
Name _____	Address _____	Phone # _____

**SKETCH OF ACCIDENT SCENE**

Please indicate on the diagram the position of vehicles, directions they were facing, traffic signal lights or stop signs, and other information which you deem pertinent.

INDICATE  
POINTS OF  
COMPASS



NOTE: IDENTIFY VEHICLES BY NUMBER WITH THE TRANSIT VEHICLE ALWAYS LABELED #1

**ABOUT THE INJURIES**

Was Anyone In Your Vehicle Injured?  Yes  No If yes, list below:

Name	Address	Taken to the Hospital?	
		Yes	No
_____	_____	Yes	No
_____	_____	Yes	No
_____	_____	Yes	No
_____	_____	Yes	No

Was Anyone In The Other Vehicle Injuries?  Yes  No If yes, list below:

Name	Address	Taken to the Hospital?	
		Yes	No
_____	_____	Yes	No
_____	_____	Yes	No
_____	_____	Yes	No

ABOUT THE SECOND VEHICLE, PEDESTRIAN OR PROPERTY

Year Make Type Color License Plate No. State Inbound Outbound

Driver or Pedestrian's Name

Address City State Age

Owner's Name Address

City State

Insurance Number Company

Agent

Point of Impact

Damage to His/Her Vehicle

What Did Driver Say

Approximate Distance Vehicle Traveled After Impact FT

Number of Passengers In Vehicle

Did Police Investigate Department

ABOUT THE THIRD VEHICLE, PEDESTRIAN OR PROPERTY

Year Make Type Color License Plate No. State Inbound Outbound

Driver or Pedestrian's Name

Address City State Age

Owner's Name Address

City State

Insurance Number Company

Agent

Point of Impact

Damage to His/Her Vehicle

What Did Driver Say

Approximate Distance Vehicle Traveled After Impact FT

Number of Passengers In Vehicle

Did Police Investigate Department

Signature of Person Preparing This Report:

Signature of Person Receiving This Report:

IF MORE THAN THREE VEHICLES, PEDESTRIANS OR PROPERTIES ARE INVOLVED ATTACH ADDITIONAL COPIES OF THIS PAGE

(d) Insurance forms, Accident/incident reporting forms in vehicle  
**See next pages.**

# NCRTD VEHICLE DAMAGE REPORT FORM

## I. GENERAL INFORMATION

DATE OF DAMAGE:    /    /	UNIT NO.:	TIME:    :	A.M. P.M.
DRIVER'S FULL NAME (PRINT):		DRIVER'S LICENSE NO.:	
LICENSE PLATE NO.:		ODOMETER READING:	
LOCATION/ADDRESS WHERE DAMAGE OCCURRED:		DESIGNATED ROUTE:	

## II. DESCRIPTION OF HOW DAMAGE OCCURRED AND DAMAGE TO RTD VEHICLE

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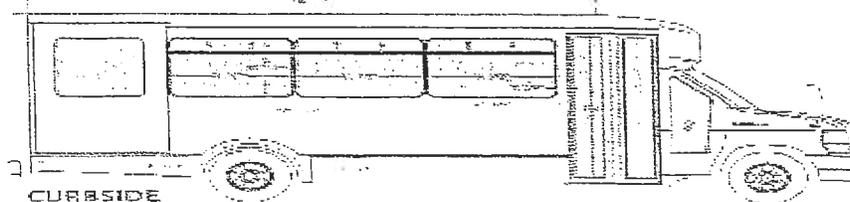
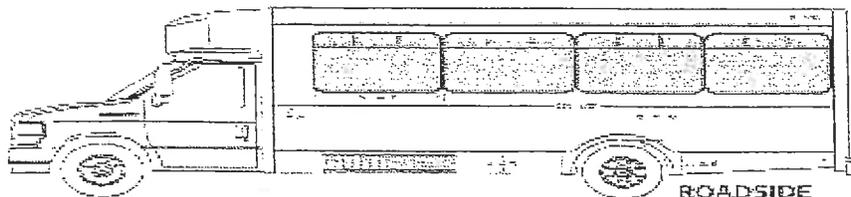
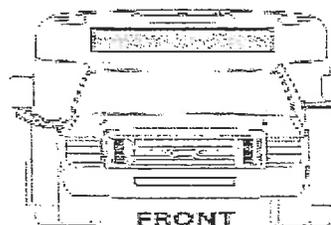
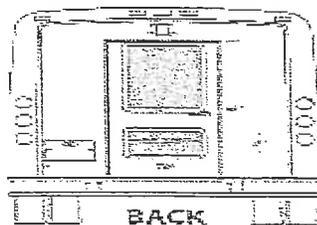
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## III. DAMAGE LOCATION? (IDENTIFY ON ILLUSTRATION)



DRIVER'S SIGNATURE

DATE

SUPERVISOR'S SIGNATURE

DATE

## 7. Passenger Conduct Policy

See next pages.

# ENHANCING YOUR RIDING EXPERIENCE



The NCRTD “Blue Bus” is committed to providing a safe and comfortable experience. We kindly ask that for your benefit and that of your fellow passengers you respect the guidelines and rules outlined below so you can continue to enjoy the service.

## FOR EVERYONE’S SAFETY:

- Vehicles are equipped with video and audio surveillance
- Please remain seated while the vehicle is in motion
- Drivers will assist passengers with visual or mental impairments, find the right bus at stops served by multiple routes
- Children under the age of 10 must be accompanied by an adult or guardian
- We can carry only 2 bikes—bike racks are “first come, first served”

## OUT OF COURTESY FOR EACH OTHER:

- Please avoid playing music that can be heard by others
- Please avoid talking loudly on your cell phone
- Appropriate clothing must be worn (shirt, pants/bottoms and shoes)
- Animals are allowed on buses under one of the following exceptions:
  - Service animals necessary for travel by passengers with disabilities
  - Animals that can be safely transported in a carrier

## WE TAKE PRIDE IN KEEPING OUR BUSES CLEAN FOR YOU! TO HELP US:

- Food in a sealed container is okay, but eating is not permitted on the bus
- Only non-alcoholic beverages in a sealed hard container can be consumed
- Please don’t put your feet on your seat or back of the seat in front of you
- Please use trash receptacles on the bus and at the bus stops

## DRIVERS HAVE THE RESPONSIBILITY TO REFUSE SERVICE WHEN THEY SEE:

- Smoking on the bus
- Open Alcoholic beverages
- Illegal drugs
- Offensive or threatening language
- Belligerent behavior
- Weapons

## LOST ITEMS?

- While the NCRTD is not responsible for lost or stolen items, we encourage you to notify the RTD at 866-206-0754 to see if it’s been recovered
- Lost and found items are only kept for 30 days