

**Bay Area Rapid Transit District  
And  
Service Employees  
International Union, Local 1021**

**Labor Agreement**

**July 1, 2009 – June 30, 2013**

**Representing Employees In The  
Maintenance And Clerical  
Subunit Of The Joint Council**



TABLE OF CONTENTS

<b>ARTICLE 0.0</b>	<b>GENERAL UNDERSTANDING</b>	<b>1</b>
<b>ARTICLE 1.0</b>	<b>MUTUAL AGREEMENTS</b>	<b>1</b>
SECTION 1.1	MUTUAL RIGHTS & RESPONSIBILITIES	1
SECTION 1.2	TERM OF AGREEMENT	1
SECTION 1.3	AGREEMENTS FURNISHED	2
SECTION 1.4	SUCCESSOR RIGHTS	2
SECTION 1.5	BENEFICIAL PRACTICES	2
SECTION 1.6	NO STRIKES AND NO LOCKOUTS	3
SECTION 1.7	WAGE GUIDELINES	4
* SECTION 1.8	CONTRACTING WORK	5
SECTION 1.9	DOMESTIC PARTNERS	6
<b>ARTICLE 2.0</b>	<b>UNION SECURITY</b>	<b>6</b>
* SECTION 2.1	UNION RECOGNITION	6
SECTION 2.2	UNION MEMBERSHIP	6
* SECTION 2.3	UNION ACCESS TO WORK LOCATIONS	7
SECTION 2.4	DUES DEDUCTION	7
SECTION 2.5	BULLETIN BOARDS	8
* SECTION 2.6	VENDING MACHINES	8
<b>ARTICLE 3.0</b>	<b>EMPLOYEE AFFAIRS</b>	<b>10</b>
SECTION 3.1	INVESTIGATION OF EMPLOYEES	10
* SECTION 3.2	ACCESS TO PERSONNEL FILES	10
SECTION 3.3	PERSONAL APPEARANCE	11
SECTION 3.4	CREDIT UNION	11
SECTION 3.5	EDUCATIONAL ASSISTANCE PROGRAM	11
SECTION 3.6	LOST ARTICLES	13
<b>ARTICLE 4.0</b>	<b>VACATION &amp; LEAVES OF ABSENCE</b>	<b>14</b>
SECTION 4.1	VACATION	14
SECTION 4.2	BEREAVEMENT	15
SECTION 4.3	MILITARY LEAVE	16
SECTION 4.4	MATERNITY LEAVE	16

* SECTION 4.5	LEAVE OF ABSENCE	17
* SECTION 4.6	JURY DUTY	18
SECTION 4.7	WITNESS DUTY	19
<b>ARTICLE 5.0</b>	<b>INSURANCE BENEFITS</b>	<b>20</b>
* SECTION 5.1	GROUP INSURANCE & DISTRICT SELF-FUNDED PLANS – GENERAL	20
* SECTION 5.2	PERS-MEDICAL & PRESCRIPTION DRUG BENEFITS	22
* SECTION 5.3	DENTAL PLAN	30
* SECTION 5.4	VISION CARE PLAN	31
SECTION 5.5	GROUP LIFE	31
* SECTION 5.6	VOLUNTARY/ADDITIONAL LIFE INSURANCE	31
SECTION 5.7	ASSAULT INSURANCE	32
SECTION 5.8	SURVIVOR BENEFITS	32
SECTION 5.9	DISABILITY COVERAGE	37
SECTION 5.10	EMPLOYEE ASSISTANCE PROGRAM	38
SECTION 5.11	BENEFITS REVIEW	38
<b>ARTICLE 6.0</b>	<b>RETIREMENT BENEFITS</b>	<b>39</b>
* SECTION 6.1	PUBLIC EMPLOYEES' RETIREMENT SYSTEM	39
SECTION 6.2	PERS PICK UP	39
SECTION 6.3	PENSIONERS' LIFE INSURANCE	40
* SECTION 6.4	MONEY PURCHASE PENSION PLAN	41
SECTION 6.5	PERS RATE REDUCTIONS	41
SECTION 6.6	ADDITIONAL PERS OPTION	42
<b>ARTICLE 7.0</b>	<b>TRANSPORTATION</b>	<b>42</b>
SECTION 7.1	PASS PRIVILEGES	42
SECTION 7.2	TRANSPORTATION, WORK RELATED	44
SECTION 7.3	TRAVEL ALLOWANCE	44
<b>ARTICLE 8.0</b>	<b>PAY PROCEDURES</b>	<b>45</b>
* SECTION 8.1	PAY PERIODS	45
SECTION 8.2	COST OF LIVING/WAGE ADJUSTMENT	46
SECTION 8.3	TRANSFERS WITHIN THE UMBRELLA	47

## BARGAINING UNIT

<b>ARTICLE 9.0</b>	<b>SICK LEAVE &amp; DISABILITY</b>	<b>48</b>
SECTION 9.1	SICK LEAVE	48
SECTION 9.2	INDUSTRIAL INJURY/ILLNESS	55
* SECTION 9.3	MEDICAL EXAMINATIONS	56
SECTION 9.4	DEFINITIONS	58
SECTION 9.5	TEMPORARY MODIFIED ASSIGNMENT PROCEDURE	59
SECTION 9.6	STRESS MANAGEMENT	64
<b>ARTICLE 10.0</b>	<b>INTERPRETATION</b>	<b>65</b>
<b>ARTICLE 11.0</b>	<b>HEALTH AND SAFETY</b>	<b>65</b>
* SECTION 11.1	SAFETY	65
* SECTION 11.2	JOINT UNION/MANAGEMENT SAFETY AND HEALTH COMMITTEE	66
SECTION 11.3	FIRST AID FACILITIES	67
SECTION 11.4	BREAK & REST FACILITIES	67
SECTION 11.5	PHYSICAL AND WEIGHT LIFTING REQUIREMENTS	67
<b>ARTICLE 12.0</b>	<b>FURNISHED EQUIPMENT</b>	<b>68</b>
SECTION 12.1	TOOLS	68
* SECTION 12.2	UNIFORMS	69
SECTION 12.3	SAFETY SHOES	71
SECTION 12.4	SAFETY GLASSES	71
SECTION 12.5	PAYROLL DEDUCTIONS	72
<b>ARTICLE 13.0</b>	<b>WORK DAY &amp; WORK WEEK</b>	<b>72</b>
* SECTION 13.1	5-8 WORK DAY & WORK WEEK	72
* SECTION 13.2	4-10 WORK DAY & WORK WEEK	74
* SECTION 13.3	MEAL PERIODS – MAINTENANCE	75
SECTION 13.4	MEAL PERIODS – CLERICAL	76
SECTION 13.5	BREAK PERIODS	76
* SECTION 13.6	SHIFT EXCHANGE	77

<b>ARTICLE 14.0</b>	<b>PREMIUM PAY</b>	<b>77</b>
	SECTION 14.1 OVERTIME	77
*	SECTION 14.2 SHIFT DIFFERENTIAL	79
	SECTION 14.3 STAND-BY PAY	80
*	SECTION 14.4 UNSCHEDULED CALL-BACK	80
	SECTION 14.5 LEADWORKER	81
*	SECTION 14.6 SPECIAL PAY PREMIUMS	81
	SECTION 14.7 TEMPORARY INSTRUCTOR	82
	SECTION 14.8 COMPENSATORY TIME OFF	82
	SECTION 14.9 SPECIAL POSITION ASSIGNMENT	83
<b>SECTION 15.0</b>	<b>VACATION</b>	<b>83</b>
*	SECTION 15.1 SENIORITY & SELECTION: VACATION	83
	SECTION 15.2 CANCELLATION DUE TO ILLNESS	84
<b>ARTICLE 16.0</b>	<b>HOLIDAYS</b>	<b>85</b>
*	SECTION 16.1 NUMBER OF HOLIDAYS	85
*	SECTION 16.2 EMPLOYEE'S BIRTHDAY	85
	SECTION 16.3 HOLIDAY PAY	86
	SECTION 16.4 HOLIDAY OVERTIME	87
*	SECTION 16.5 HOLIDAY SCHEDULING	87
<b>ARTICLE 17.0</b>	<b>TRAINING</b>	<b>88</b>
*	SECTION 17.1 GENERAL PROVISIONS	88
*	SECTION 17.2 JOINT TRAINING COMMITTEE	89
*	SECTION 17.3 INTERMEDIATE AND SENIOR CLERKS IN TRAINING	89
	SECTION 17.4 EMPLOYEE DEVELOPMENT SPECIALISTS	90
	SECTION 17.5 TRAINING SCHEDULING	91
	SECTION 17.6 TRAINING, TRAVEL AND SHIFT DIFFERENTIAL	91

SECTION 17.7	CHANGE DEVELOPMENT AND TRAINING OVERSIGHT COMMITTEE	91
SECTION 17.8	TRAINING EQUIPMENT AND MATERIAL	93
SECTION 17.9	TRAINING PROGRAMS	93
<b>ARTICLE 18.0</b>	<b>NON-DISCRIMINATION/AFFIRMATIVE ACTION</b>	<b>99</b>
SECTION 18.1	EQUAL OPPORTUNITY	99
SECTION 18.2	AFFIRMATIVE ACTION COMMITTEE	99
<b>ARTICLE 19.0</b>	<b>SPECIAL PROVISIONS</b>	<b>100</b>
* SECTION 19.1	STAFF ASSISTANTS, CLERICAL AND ENGINEERING AIDES	100
SECTION 19.2	FOREWORKERS	101
<b>ARTICLE 20.0</b>	<b>UNION REPRESENTATIVES</b>	<b>102</b>
* SECTION 20.1	UNION REPRESENTATIVES	102
SECTION 20.2	SUPER-SENIORITY	105
<b>ARTICLE 21.0</b>	<b>GRIEVANCE PROCEDURE</b>	<b>106</b>
SECTION 21.1	DEFINITION	106
* SECTION 21.2	PROCEDURE	106
SECTION 21.3	WITNESSES	109
SECTION 21.4	TIME LIMITS	110
<b>ARTICLE 22.0</b>	<b>DISCIPLINE PROCEDURE</b>	<b>110</b>
SECTION 22.1	PRE-DISCIPLINARY HEARING REQUIRED	110
SECTION 22.2	PRE-DISCIPLINARY HEARING	110
SECTION 22.3	DEROGATORY MATERIAL	111
SECTION 22.4	JOB ABANDONMENT	111
<b>ARTICLE 23.0</b>	<b>SENIORITY</b>	<b>112</b>
SECTION 23.1	DISTRICT DATE-OF-HIRE	112
SECTION 23.2	CLASSIFICATION SENIORITY	112

SECTION 23.3	COMMON SENIORITY DATE	112
SECTION 23.4	SYSTEM-BIDDING SENIORITY	113
SECTION 23.5	TERMINATION OF EMPLOYMENT	113
<b>ARTICLE 24.0</b>	<b>BIDDING</b>	<b>113</b>
* SECTION 24.1	CLERICAL SUBUNIT	113
* SECTION 24.2	MAINTENANCE SUBUNIT	114
* SECTION 24.3	SYSTEM-WIDE BIDDING	115
SECTION 24.4	SYSTEM-WIDE POSITION AWARD	117
SECTION 24.5	ADVANCE BID PROCEDURE	118
* SECTION 24.6	FOREWORKER EVALUATION COMMITTEE	119
SECTION 24.7	RELIEF SHIFT	120
SECTION 24.8	ELIGIBILITY BIDDING POOLS	121
<b>ARTICLE 25.0</b>	<b>REDUCTION IN FORCE</b>	<b>122</b>
* SECTION 25.1	CLERICAL	122
SECTION 25.2	MAINTENANCE	123
SECTION 25.3	RECALL	124
<b>ARTICLE 26.0</b>	<b>PROBATION</b>	<b>125</b>
SECTION 26.1	NEW HIRES	125
* SECTION 26.2	PROMOTION WITHIN THE BARGAINING UNIT	125
SECTION 26.3	EMPLOYEES HOLDING/ACCEPTING POSITIONS OUTSIDE THE BARGAINING UNIT	126
<b>ARTICLE 27.0</b>	<b>TEMPORARY POSITIONS</b>	<b>127</b>
* SECTION 27.1	POSITION ASSIGNMENT	127
SECTION 27.2	TEMPORARY UPGRADE	131
SECTION 27.3	PART-TIME EMPLOYMENT AND TEMPORARY AGENCY EMPLOYMENT	131
<b>ARTICLE 28.0</b>	<b>CLASSIFICATION &amp; PAY</b>	<b>134</b>
* SECTION 28.1	JOB DESCRIPTIONS	134
* SECTION 28.2	FUNCTIONAL CLASSIFICATION 1	134
* SECTION 28.3	CLASSIFICATION PLAN	146

<i>SEIU 2009-2013</i>		vii
SECTION 28.4	BASE WAGE SCHEDULE	147
SECTION 28.5	BUSINESS ADVANCEMENT PLAN – “BAP” (UPDATE OF ELECTRONIC DATA MANAGEMENT SYSTEMS)	165
<b>ARTICLE 29.0</b>	<b>SIDE LETTERS AND MEMORANDA OF UNDERSTANDING (MOU’s)</b>	<b>166</b>
SECTION 29.1	DEFINITIONS	168
SL UPE-1-3	SYSTEM FOREWORKER JOB DESCRIPTION	172
SL GEN-4-4	DEFERRED COMPENSATION PLAN AND QUALIFIED MONEY PURCHASE PENSION PLAN	174
SL GEN-4-3(A)	IMPLEMENTING THE TRANSFER OF 1.627%	180
SL UPE -6-2	BUDGET ANALYST CLASSIFICATION	183
SL UPE-6-3	NEW UPE 790 PAY PLAN FOR PROFESSIONAL EMPLOYEES	184
SL ATU/SL-8-9	TRANSPORTATION AND SYSTEM SERVICE DEPARTMENT	186
SL GEN-4-5	DONATION OF VACATION & FLOATING HOLIDAYS	189
SL SEIU-1-9	CAD DRAFTERS	191
SL FSA SEIU/ SL 6-7	FLEXIBLE SPENDING ACCOUNT	192
SL SEIU Side Letter No. 7-5	RS&S WORK CREWS FOR SHOP-SPECIFIC PROJECTS	198
SL-10-1	RETIREE MEDICAL ELIGIBILITY AND COST SAVINGS	200
MOU UPE/ MOU 002-4	SUPER SENIORITY	202
MOU UPE/ MOU 007-4	4-10 WORK WEEK PLAN	203
MOU UPE/ MOU 022-6	4-10 WORK WEEK	204
MOU 011-4	RELIEF SHIFT - ROLLING STOCK & SHOPS	205
MOU UPE/ MOU 014-4	ROLLING STOCK FOREWORKER MEAL PERIODS	207

*\* See Minute Clarification, Memorandum of Understanding and/or Side Letters*

MOU UPE/ MOU 028-6	CLERICAL STAFF OVERTIME PROCEDURE - TRANSIT INFORMATION CENTER	208
MOU UPE/ MOU 031-7	EDS/SHOP TRAINERS	210
MOU-033-7	SYSTEM SERVICE ISSUES	211
MOU-034-7	BUILDING FOREWORKER CLASSIFICATION	214
MOU 027-6	CLERICAL STAFF OVERTIME PROCEDURE - ROLLING STOCK & SHOPS	215
MOU-040-8	CLASS A DRIVER'S LICENSE IN TRACK & STRUCTURE	217
MOU-95-01	RANDOM SUBSTANCE ABUSE TESTING REPRESENTATION	219
MOU-044-8	RESOLUTION OF SERVICE WORKERS UPGRADE TO FOREWORKER II POSITION(S)	221
MOU 049-8	FOREWORKER EVALUATION COMMITTEE	223
MOU-047-8	MODIFICATION TO MEMORANDUM OF UNDERSTANDING 007-4	226
MOU GEN-8-1	FLEXIBLE SPENDING ACCOUNT PROGRAM	227
MOU No. 062-1 (formerly 062-2)	LAYOFF PROCESS	228
MOU 063-3	HAYWARD "BACK SHOP" PROBATIONARY PERIOD REVERSION	240
MOU 062-2	LAI-D-OFF EMPLOYEES - ELEVATOR AND ESCALATOR TRAINING	242

**ATTACHMENT A**

BUILDINGS WORKER	244
ELECTRICAL HELPER	247
QUALITY TEAM LEADER	250
STRUCTURES WORKER	254
SYSTEM SERVICE WORKER	256
TRACK WORKER	258
TRANSIT VEHICLE ELECTRONIC TECHNICIAN	261
TRANSIT VEHICLE MECHANIC	264
UTILITY WORKER	267
VEHICLE INSPECTOR	269



## **0.0 GENERAL UNDERSTANDING**

The parties agree that whenever the word "will" and/or "shall" is used in the Agreement, they are synonymous.

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## **1.0 MUTUAL AGREEMENTS**

### **1.1 MUTUAL RIGHTS & RESPONSIBILITIES**

The Unions and the District agree that both have obligations and responsibilities to see that the statutory objective of the Bay Area Rapid Transit District law is attained and the public receives a rapid and efficient transit system. The District has the duty to execute the traditional responsibilities of the District to attain this goal and the Unions recognize the District responsibilities. The District, in turn, recognizes its responsibility to treat employees fairly and equitably.

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### **1.2 TERM OF AGREEMENT**

The term of this Agreement shall be from and including the first day of July 2009 up to and including the 30th day of June 2013 or one hundred (100) days following receipt of notice of a desire to modify or terminate this Agreement, whichever occurs later. Each party shall comply with Section 1137.1, Par. B of Chapter 9, Part 3, of Division 2 of the California Labor Code, as amended. In the event either party serves notice upon the other party of a desire to modify or terminate the Agreement, the parties shall meet and make all reasonable efforts to reach agreement on the subject matters of such proposed modifications.

The parties shall respond to any requests for information reasonably necessary for intelligent negotiations and the standards and guidelines in accordance with 1137.1, Par. C, of Chapter 9, Part 3 of Division 2 of California Labor Code, as amended. Each party shall supply to the other party such reasonable data as are requested by the other party.

To the fullest extent possible the parties shall endeavor to complete their negotiations at least seven (7) days prior to the date any lawful economic action may be taken in connection with any dispute concerning any proposed changes in any Collective Bargaining Agreement.

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### **1.3 AGREEMENTS FURNISHED**

The District will ensure that copies of this Agreement are printed within sixty (60) days of signing, will pay the full cost of printing such Agreements, and will ensure the Allied printing label appears. The Union will provide a list of Allied printing establishments in the Bay Area within three (3) days of signing.

The District will provide two hundred (200) copies of the Agreement to each of the signatory Unions for the term of this Agreement.

The District will provide a copy of the Agreement to all current employees within two (2) weeks of receipt of printed copies. New employees will be provided a copy of the Agreement upon employment.

The Agreement shall be provided on pocket size paper. Removable binders shall be replaced when worn out.

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### **1.4 SUCCESSOR RIGHTS**

In the event the operations of the District, in whole or in part, are assumed by any other entity, public or private, the successor organization or organizations shall agree, as a condition precedent of said assumption, to all terms and conditions of this Agreement as though said Agreement were more fully set forth in the assumption agreement by and between District and the assuming party or parties.

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### **1.5 BENEFICIAL PRACTICES**

Rules or regulations or practices within the scope of representation affecting employees beneficially will not be changed without mutual agreement, provided that District Management has accepted the past practice over a reasonable period of time as an established practice that is unequivocal, clearly enunciated and acted upon. For purposes of this provision, "District Management" does not include any individuals represented by SEIU.

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## 1.6 NO STRIKES AND NO LOCKOUTS

A. It is the intent of the District and the Unions to assure uninterrupted transit service to the public during the life of this Agreement. Accordingly,

1. No employee or Unions signatory hereto shall engage in, cause or encourage any strike slowdown, picketing, concerted refusal to work, or other interruption of the District's operations for the duration of this Agreement as a result of any labor dispute;
2. The District shall not lockout any employee covered by this Agreement during its term as a result of any labor dispute;
3. It shall not be a violation and shall not be cause for discipline for a District employee voluntarily to refuse to enter upon any property involved in a primary bona fide labor dispute. It shall not be a violation of this Section and shall not be cause for discipline of any employee by any party or other employee subject to this Agreement, should any employee voluntarily enter District property at a time when the District is involved in a primary labor dispute; provided, however, such employees shall not perform, nor be assigned, any work of any BART employee represented by the employee organization in such dispute.

For purposes of this Section, a primary labor dispute is defined as a dispute between BART and other BART employee organizations. (Reference R. E. Burns Arbitration Award of 7/2/74 for other specifics.)

4. In any case where employee conduct occurs in violation of this Section, the Unions will promptly take all necessary action to bring about a termination of such conduct, and where so requested by the District, will give individual notification to the employees involved to cease such conduct.

B. In the event of any alleged violation of Paragraph A of this Section, either the District or the Unions may seek immediate arbitration before one of the named arbitrators to be selected in accord with the arbitration procedures set forth in the appropriate Subunit supplemental provisions. The party seeking such arbitration shall use its best efforts to notify the other party of the referral to arbitration by means of telephone or written notice including telegraphic, delivered to the principal office of the party against whom the award is being sought. The question in such arbitration shall be whether

either party or any employee covered by this Agreement has engaged or is engaging in activities in violation of this Section. The arbitrator shall have full equitable power to resolve the dispute, including the power to immediately issue an order to terminate the activities in violation of this Section. Such award shall be binding on both parties and employees. The expenses of the arbitration shall be borne by the party against whom the award is entered. Unless the parties agree that the arbitrator shall retain jurisdiction to decide the underlying dispute at the same hearing, he/she shall refer the dispute leading to or determined to be the cause of the alleged violation of Paragraph A of Section 1.6 to the appropriate grievance and arbitration procedure provided under this Agreement. If either party raises an issue of arbitrability of the dispute allegedly causing the violation of Paragraph A of Section 1.6, said preliminary issue of arbitrability shall be decided by the same arbitrator selected to hear the underlying dispute on the merits.

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## **1.7 WAGE GUIDELINES**

Both parties recognize this Agreement is the result of negotiations between the parties for represented employees and, in the event any wage increase or other benefit or condition provided in this Agreement results in any challenge or determination by any governmental agency, the parties agree to use their best efforts in a joint appeal to such governmental agency to uphold the validity and propriety of such provision.

Pending exhaustion of such appeal, the challenged provision shall be suspended except that, the parties may commence negotiations within thirty (30) days of such challenge to ensure that the superseded portion(s) shall be rewritten to conform legally as nearly as possible to the original intent.

In the alternative, the parties may negotiate an alternate provision not exceeding the cost of the provision challenged.

Should the parties fail to agree, the grievance procedure may be invoked in its entirety by either party.

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## 1.8 CONTRACTING WORK \*

It is in the intent of the parties that work connected with the operation and maintenance of the system be performed by the bargaining unit employees, consistent with the basic Bay Area Rapid Transit District operations and maintenance philosophy.

Should it become necessary to deviate from this practice, the Unions shall be informed of the reason work is being contracted. The District shall fax a Contract Notification Form to the President of the ATU, or the BART Chapter President, the President of the Professional Chapter, and the Chair of the SEIU Contracting Out Committee, whichever Union is directly affected, prior to submitting the Contract Notification Form to the Procurement Department. The Contract Notification Form will identify the date it is faxed. The Union shall have seven (7) workdays after the Contract Notification Form is faxed to provide any comments to the department manager. If comments are received within the seven (7) workday period, the Department Manager will consider the comments before making his or her final decision to contract.

It is agreed that prior to contracting work, the District will give consideration to whether adequate numbers of qualified employees are available to perform the necessary work within time limits available, whether sufficient and suitable equipment is available within the District to perform the work, whether shop capacity is adequate, whether the use of District employees shall involve extra cost to the District, or whether the performance of the work presents added hazards to existing employees which are not present in their normal assignments. Temporary work load, over and above normal positions, including overtime, may be contracted out. Suppliers' personnel performing work related to their equipment and clearly not bargaining unit work will not be prohibited.

Contracts in effect at the time of this Agreement will not be voided by terms of this Agreement.

### \* Minute Clarification

District procedures regarding contracting out work which include prior notice to the Unions at the commencement of the contracting process shall continue during the term of this Agreement.

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## 1.9 DOMESTIC PARTNERS

All benefits and considerations afforded to spouses of employees/retirees shall be provided to eligible domestic partners on a substantially equivalent basis subject to any statutory constraints.

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## 2.0 UNION SECURITY

### 2.1 UNION RECOGNITION \*

A. Pursuant to an election conducted April 18, 1973, by the State Conciliation Service, the District recognizes United Public Employees Local 1021 of the Service Employees International Union, AFL-CIO, as the sole and exclusive bargaining agent for employees in the Clerical and Maintenance Subunits and Local 1555 of the Amalgamated Transit Union International, AFL-CIO, as the sole and exclusive bargaining agent for employees in the Transportation Subunit, as described in the Decision of the Director of the California Department of Industrial Relations, dated March 6, 1973, In the Matter of Bargaining Units of the San Francisco Bay Area Rapid Transit District, as amended.

The District recognizes Local 1555 of the Amalgamated Transit Union International, AFL-CIO, as the sole and exclusive bargaining agent for Emergency Procedures Assistants (EPA) employees in the Transportation Subunit, as described in the decision of the Director of California Department of Industrial Relations, dated July 11, 1980.

#### \* Minute Clarification

The parties agree that the inclusion of the language recognizing Amalgamated Transit Union - Local 1555 as representative for the EPA's in Section 2.1 of the Agreement does not alter the agreement between the District and ATU 1555 that the only terms and conditions governing EPA's will be those set forth in the Article of the Collective Bargaining Agreement specifying such terms and conditions.

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### 2.2 UNION MEMBERSHIP

Employees within the scope of this Agreement shall become members of the Union and remain members in good standing as a condition precedent to continued employment with the District.

Present employees who are members shall be required to continue their membership in the appropriate Union. All other employees shall be required to become members of the applicable Union to their Subunit within thirty-one (31) days of the signing of this Agreement or thirty-one (31) calendar days following employment, whichever occurs later, except those employees in classifications or positions subsequently excluded from the bargaining unit by mutual agreement. In the event of such an agreement, exclusions shall be set forth by Side Letter.

All employees covered by this Agreement, within thirty-one (31) days of the execution of this Agreement, or for new hires, within thirty-one (31) days following the date of employment, shall execute a payroll deduction authorization. The timely execution of such authorization shall be a condition precedent to continued employment with the District.

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### **2.3 UNION ACCESS TO WORK LOCATIONS \***

Non-employee business agents and employee Union officials will be permitted access to District facilities for the purpose of conducting Union business. Where reasonable and practical, they will provide notification in advance to the area supervisors as to the general purpose of said visit, the anticipated time involved, and employees to be contacted. District will provide an area for meeting purposes. Such agents or officials will be permitted entry upon presentation of acceptable identification to the supervisor in charge of the shop, whenever possible, and will be required to observe all safety and other rules and regulations of the District.

#### **\* Minute Clarification**

The understanding of the parties regarding changes in Section 2.3, Union Access to Work Locations, is that outside Union officials who have contacted a shop to advise of a visit shall, upon arrival at the shop, contact the person in charge of the shop and advise of their arrival. They will then decide where the meeting is to be held, as appropriate.

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### **2.4 DUES DEDUCTION**

The District agrees to make payroll deductions as hereafter indicated from the pay of employees covered by the Agreement. Such deductions shall commence upon submission of a written authorization satisfactory

to the District by the employee as forwarded by the Union. Deductions shall include monthly membership dues, assessments, insurance premiums, initiation fees, and contributions and shall be forwarded monthly to the appropriate Union. Dues and assessments shall be uniformly applicable to all employees in the same job classification or pay level in the applicable subunit.

No fines or penalty imposed on an individual by the Union shall be collected by means of payroll deduction under this Section. The Unions agree to furnish the District with written notice of changes in amounts to be deducted by the tenth of the month in which such changes are to be effected.

The Unions shall hold the District harmless from any and all claims, and will indemnify it against any unusual costs in implementing these provisions.

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## 2.5 BULLETIN BOARDS

Clear covered bulletin boards with locks and keys will continue to be provided in Maintenance, Transportation, Stations and office facilities for the sole use of the Amalgamated Transit Union Local 1555 and Service Employees International Union Local 1021 notices of meetings or other business pertaining to the Unions. Any additional number of boards and their locations shall be mutually agreed upon by the parties.

Due to relocation of District offices, the parties agree to meet within 180 days of signing this contract to establish bulletin board locations.

The Unions agree that Employee Relations shall be furnished a copy of any material being displayed on any bulletin board at the time of posting. Said material shall be authenticated by the signature of the designated representative of the Union. Such Union bulletin boards shall be maintained by the Unions.

If a copy of posted material is not provided to the District within twenty-four (24) hours, it shall be removed from all bulletin boards.

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## 2.6 VENDING MACHINES \*

ATU Local 1555 and SEIU Local 1021 are authorized to establish vending machines in the District employees' work areas, and the District shall approve any reasonable plan with respect to such machines.

The Unions shall have the responsibility of contracting for the installation of such machines, along with maintenance.

Proceeds shall be deposited in a special fund under the direction and control of a representative of ATU Local 1555 and SEIU Local 1021, and shall be divided on a basis established by the Unions, allocated for the exclusive benefit of the employee's welfare and recreation as determined by the Unions.

The Unions will hold the District harmless from any expense or claim relating to the establishment and maintenance or distribution of such vending machines. The Unions shall indemnify the District in any contract entered into by Unions for the vending machines.

**\* Minute Clarification**

A. The parties have reached the following agreements with respect to vending machines in the Regional Administration Facility (RAF):

ATU Local 1555 and SEIU Local 1021 are authorized to establish vending machines in the portions of the RAF Building exclusively owned and controlled by the District (District's "condominium unit") except for the cafeteria. The District shall approve any reasonable plan with respect to vending machines in the District's unit other than the cafeteria.

The Unions may also establish vending machines in portions of the RAF Building which are not exclusively owned and controlled by the District if the other owners/occupiers do not object.

The District shall have complete discretion over the administration and operation of the cafeteria, including design and placement of equipment, selection of vendors, and installation of vending machines, if any. Any proceeds from the operation of the cafeteria, including vending machines located therein, shall accrue to the District.

B. The deletion from this section the language "and shall be in accordance with the current practice for vending machines in passenger stations" in the 1985-88 Agreement, is only to reflect the current practice of not maintaining or using vending machines in stations.

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### **3.0 EMPLOYEE AFFAIRS**

#### **3.1 INVESTIGATION OF EMPLOYEES**

Employees shall cooperate fully in any investigation of misconduct, operational difficulties, etc. made by the District, subject to the provisions of the grievance/discipline procedure. Failure on the part of employees to cooperate during such investigation may result in disciplinary action. The District shall not initiate any investigations of its employees without reasonable cause.

The District reserves the right to conduct District-wide investigations. The District shall seek the prior cooperation and assistance of the Union and the Union shall, in such cases, cooperate fully and take whatever action necessary to bring about a cessation of the activity that gave rise to the investigation.

District lockers may be periodically inspected as determined by the District, but such routine locker checks will not be initiated without prior notification to a Union representative to include an offer to be present during such inspection. Inspections deemed necessary as part of an investigation to determine a violation of criminal law shall not be subject to restriction.

The District shall not utilize or involve Police Services in the investigation of any incidents initially involving industrial relations, including accidents of an industrial nature. However, after an initial investigation of an incident involving industrial relations or such accidents, Police Services may be utilized if and when a violation of criminal law is indicated.

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#### **3.2 ACCESS TO PERSONNEL FILES \***

Each employee shall be provided a copy of all matters placed in their official personnel file. Upon written request of the employee, matters as referenced in the Supplemental Provision shall be removed from the file.

An employee shall be permitted at any time during regular office hours to inspect his/her personnel file. He/she may also authorize in writing the Union Representative to also inspect his/her personnel file. Such reviews shall be made in the Employee Relations Department subject to the presence of a member of the Employee Relations staff or its designee.

Suspended or terminated employees (and their Union Representative), pending final disposition of the case, shall have similar access rights.

Material in personnel files shall be regarded as confidential and disclosed only in accordance with provisions of law.

**\* Minute Clarification**

The parties agree that this first paragraph of this Section is intended to conform to the practice of maintaining the confidentiality of the employees' personnel files and that the employees shall receive copies of all matters placed in their file with the exception of personnel transaction forms, medical reports and reference checks.

The District agrees that personnel transaction forms will not be accessible to supervisory personnel who review qualifications of employees for promotional consideration.

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### **3.3 PERSONAL APPEARANCE**

Employees will maintain an appropriate appearance.

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### **3.4 CREDIT UNION**

The District will continue to participate in The Golden One Credit Union, Provident Central Credit Union, and Metro 1 Credit Union. Employees may select only one of the three (3) Credit Unions for utilization of payroll deduction. The District will make brochures and application forms available to employees upon request.

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### **3.5 EDUCATIONAL ASSISTANCE PROGRAM**

The District's Educational Assistance Program will be continued during the life of this Agreement. Employees who wish to enroll in job-related and promotion oriented courses which will improve their job knowledge and performance will be compensated by the District for expenses as follows:

- A. When an employee is in the process of acquiring a sixty (60) semester unit or a ninety (90) quarter unit degree (e.g., Associate of Arts, Certificate of Achievement), or when an employee is properly authorized to enroll in a correspondence course and/or a specific

course of study that may not result in a degree, said employee shall be reimbursed up to a maximum of seven hundred fifty dollars (\$750.00) per fiscal year.

- B. When an employee exceeds sixty (60) semester units or ninety (90) quarter units and is enrolled in upper division course work, said employee shall be reimbursed up to a maximum of one thousand dollars (\$1,000.00) per fiscal year.
- C. The maximum amount that an employee may be reimbursed under this program in any fiscal year is one thousand dollars (\$1,000.00).

Out-of-pocket expenses for required textbooks and course materials may be included for reimbursement within the above dollar limits. Textbooks may be retained by the employee upon completion of the course.

Courses must be taken at an accredited institution, or through correspondence courses or other approved vendors, whether training is delivered in-person or on-line, if comparable courses are not available in local schools or if the work assignment of the individual is such that it does not permit regular classroom attendance. Approval of other vendors under this section and the establishment of criteria for successful completion, when those listed below are inapplicable shall be at the discretion of the Department Manager of Training and Development.

Except for unusual circumstances, employees will not be granted time off from their regular work schedule to attend courses taken under this Section.

Approval for said courses must be granted by the department head prior to enrollment. Reimbursement shall be made upon presentation of proper receipts and upon completion of the course with at least a grade "C" or its equivalent.

At the employee's option, an advance may be secured from the District against tuition costs by agreeing to payroll deduction of the amount of the advance if:

1. satisfactory evidence of completion of the course taken is not provided to the District within thirty (30) days following completion of the course; or
2. the course is not completed with at least a grade "C" or its equivalent; or

3. the course is failed; or
4. the employee voluntarily drops the course for any reason, including voluntary shift change or termination of employment with the District.

If the employee's course is not completed due to a District required shift change or reduction in force, repayment of the advance will not be required.

D. The District will periodically provide the Union with a report of Union members who have applied for District course compensation, the course subject and status of the course application.

E. **Definitions**

1. **District required shift change:** a reorganization or District mandated classification rebid resulting in an involuntary shift change due to the seniority of an employee.
2. **District required reduction in force:** reduction in force actions as described in SEIU 1021 Article 25 and ATU 1555 Article S31, resulting in employee being placed in lay-off status with recall rights.
3. **Voluntary shift change:** any shift change in which the individual has the ability to control movement affecting him/her adversely, i.e., advance bid, promotion, reverting to his/her former position, system bids, line/yard bids, lateral bids, etc.

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### 3.6 LOST ARTICLES

All lost property shall be handled in accordance with the following procedures:

- A. If given to an employee by other than another employee, the name and address of the finder shall be obtained and he/she shall be notified of the procedures under this Section.
- B. If found by an employee, it will be returned without delay to the owner or, if unable to do so, turned into the District not later than the following day. When an employee is of the opinion such property is valuable, he/she shall immediately report the same to the supervisor, and it shall be properly identified and turned over by the supervisor to the Lost and Found office.

- C. The District Lost and Found office will maintain a record of such property, including the name of the employee turning in the property, and if unclaimed after a prescribed period, the property shall be sold at public auction pursuant to regulations established by the District not in conflict with this Section. Employees shall be permitted to bid at such auction.
  - D. The Union shall be provided a copy of the public notice of auction at the time such notice is published.
  - E. Lost property turned in by an employee may be returned to the employee finding same following the prescribed retention period if such return is permitted by law.
  - F. The District agrees to furnish any information to the employee finding lost property as to its final disposition upon request from the employee.
  - G. Any property found that is suitable for an employee welfare or recreation program, or for other District purposes, shall be retained by the District after the period of retention has expired and allocated to such purpose.
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#### **4.0 VACATION & LEAVES OF ABSENCE**

##### **4.1 VACATION**

The District will grant three (3) weeks of vacation following one (1) year of service, four (4) weeks of vacation after eight (8) years of service, five (5) weeks vacation after fifteen (15) years of service and six (6) weeks vacation after twenty (20) years of service. Employees may carry over up to sixty (60) days (up to forty-eight [48] days for employees on a 4-10 Plan) of vacation. Employees with four (4) or more weeks of accumulated vacation will be allowed to buy back up to forty (40) hours of such vacation. The election of such buy-back shall be made in December with determination of the four (4) week eligibility threshold to be made in December the following year with payment made in the second February following the election. Subject to applicable law and policies applicable to the MPPP program, employees may elect to have such payment deposited in their MPPP account on a post tax basis. This shall take effect when BAP Phase I goes live.

Employees will select their vacation in accordance with the applicable seniority provisions consistent with the scheduling ability of their department, division or section.

In the event an employee terminates or retires, he/she shall be granted pro rata vacation compensation based upon his/her accrued credits.

Vacation allocation will be scheduled throughout the calendar year; however, to the maximum extent possible, consideration consistent with operating requirements will be given to allow employees to take their vacation during the summer months.

Should a contractual holiday fall within the employee's vacation period, compensation will be applied consistent with holiday provisions of this Agreement.

Years of service shall be based upon the employee's date of employment by the Bay Area Rapid Transit District or in the case of 13(c) employees, in accordance with the 13(c) Award.

Vacation accrual will not be continued beyond thirty-one (31) days in the event an employee is in a non-pay status.

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## 4.2 BEREAVEMENT

When a death occurs or appears imminent in the immediate family of an employee, the employee shall be granted up to a total of five (5) days for death of the employee's current spouse or eligible domestic partner per Board Resolutions 4455 and 4757, or other members of the employee's immediate family if the employee is on a five (5) day per week work week schedule or a nine-eighty (9/80) work schedule, four (4) days if the employee is on a four (4) day per week work week schedule. Such leave shall not be deducted from any other leave accrual. To be eligible for compensation for bereavement pay, the employee, upon his/her return, must provide written verification by the attending physician of death or imminence and indication of relationship of the member of the immediate family involved. False information given concerning the death, imminence, or relationship shall be cause for discharge. The immediate family of an employee is defined as spouse or an employee's eligible domestic partner, child, or a child of an employee's domestic partner, parent, brother, sister, grandparent; and current, parent of spouse/eligible domestic partner, step-parent, step-child and legal guardian.

"Domestic Partner" is defined in Section 1.9.

Only one (1) bereavement leave within a twelve (12) month period shall be granted an employee for each member of the immediate family.

In agreeing to continue existing language in this Section, the parties understand that alternate forms of leave, e.g., vacation, floating holidays, leaves of absence without pay, are available to employees who may wish to extend the bereavement period and such reasonable request for said extensions have been granted in the past and shall continue to be considered and granted in the same manner.

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### **4.3 MILITARY LEAVE**

Employees of the District who are ordered to active duty with the Armed Forces for a period not to exceed one hundred eighty (180) calendar days, including travel time, will be granted a temporary military leave of absence for time required to meet military obligations as established by State and Federal law. Employees must furnish the District with a copy of the orders as early as possible prior to such leave.

During such military leave, employees with one (1) year of District service will be eligible for their existing straight time rate of pay for the first thirty (30) calendar days of any such absence during a fiscal year (July 1 - June 30).

For purposes of this Section, weekend military training sessions shall not be considered as Military Leave; however, employees who have military training sessions on weekends (Saturday and Sunday), and whose assigned work week includes Saturday or Sunday, or both, may request adjustment of their scheduled rest day or days off where work is available which they are qualified to perform in order to attend such sessions without loss of pay. Employees must request such arrangements in writing as far in advance as possible and provide verification of attendance upon return to work. No additional compensation, shift premiums, or other extra costs to the District shall result from such adjustments.

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### **4.4 MATERNITY LEAVE**

Maternity Leave of absence will be granted each employee covered by this Agreement who becomes pregnant. Such leave will begin no later

than the date the employee's doctor states in writing she should discontinue working.

Maternity Leave will continue until the date on which the employee's doctor states in writing she is capable of returning to work, or until such time as an additional leave of absence granted by the District expires.

Should there be a determination that there is a pregnancy-related disability, employees may utilize unused sick leave and, to the extent possible, the Disability Insurance provided by the District.

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#### 4.5 LEAVE OF ABSENCE \*

Employees may occasionally be required to request time off without pay. When such time off becomes necessary, it must be requested through the employee's immediate supervisor.

A leave of absence, for the purposes of this Section, is defined as an absence from work requested in writing by a District employee and approved in writing by the employee's Department Head and by the Department Manager of the Employee Relations Department. Such leaves must specify an agreed-upon period of time normally longer than two (2) days but not to exceed six (6) calendar months.

Leaves of absence generally fall into the following categories:

- A. **Emergency Leave:** To assist an employee in taking care of crisis circumstances or conditions which cannot normally be handled while working full time.
- B. **Vocational/Educational Leave:** To assist an employee in preparation for possible upward mobility in the District. (The District makes no representation that leave for such purpose will result in promotions or transfers.)
- C. **Leave for Personal Matters:** To allow employees time off to attend to such matters which are not urgent and are purely personal in nature, but which are of such character as to require a short absence from work.
- D. **Voluntary Service Leave:** To allow employees time off who are volunteer members of a federal, state, or local certified fire department, police department, or American Red Cross.

The District will determine the length of time it will grant for such leave in each individual case.

The District reserves the right to extend a given leave if it deems it desirable to do so.

During the period of time in which an employee is on leave of absence, he/she shall accumulate service with the District.

Any employee who fails to return to work upon conclusion of the agreed-upon leave of absence shall be considered to have voluntarily terminated his/her employment with the District, subject to the terms of section 22.4 of the SEIU agreement or 39.7 of the ATU agreement for non-probationary employees.

Employees on leave of absence shall have the option to pay any costs involved into and continue to participate in Health & Welfare programs and life insurance.

#### **\* Minute Clarification**

The parties agree that requests for leaves of two (2) days or less shall continue to be made through the employee's immediate or appropriate supervisor without the involvement of the Employee Relations Department.

The District further agrees to continue its practice of notifying the Union on approved leaves of absence in excess of thirty (30) days. The District also agrees that in the event it considers a request for extension of a leave of absence beyond a six (6) month period, it shall advise the Union prior to approving such leave.

However, the District is not precluded from approving such extended leave in the event the Union objects.

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#### **4.6 JURY DUTY \***

Pursuant to State law, an employee shall be excused from work on a workday on which he/she performs jury service, providing he/she gives prior notification to his/her supervisor. During such excused absence, an employee shall be paid up to an amount of the difference between jury fees and his/her existing shift earnings, exclusive of reimbursable travel expenses.

No such payment will be made to an employee excused for jury service unless a statement is provided to the District showing the amount of fees paid or payable and the time spent in jury service.

When an employee has served five (5) consecutive days on jury duty under the 5-8 work week plan or four (4) consecutive days under the 4-10 work week plan and that service conflicts with one or more of the employee's RDOs, the employee has the option to reschedule their RDOs with his/her supervisor without additional cost to the District.

#### **\* Minute Clarification**

The parties agree exercise of this option shall be within the work week in which the Jury Duty occurs. If the court recesses for the day without discharging the employee from jury duty or discharges the employee from jury duty, the employee may use a floating holiday or accumulated vacation for the next scheduled shift.

Also, if the employee's active jury duty encompasses a portion of his or her normally scheduled (i.e. non-jury duty) days off, he or she shall receive the following Saturday and/or Sunday as a day(s) off. If the employee performs active jury duty on the first normally scheduled RDO, Saturday shall be a substitute RDO. If the employee performs active jury duty on his or her second normally scheduled RDO (or third in the case of four-ten employees) Sunday shall be a substitute RDO.

The employee shall notify his or her supervisor of his or her election to work or use holiday or vacation time as provided above in accordance with his or her department's normal departmental reporting procedures.

#### **\*Minute Clarification**

The split RDOs will be used in the case of jury duty only on a non-precedent setting basis.

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## **4.7 WITNESS DUTY**

An employee shall be excused from work on a work day on which he/she is subpoenaed as a witness in court, before a Grand Jury or for a deposition, providing he/she gives prior notification to his/her supervisor. During such excused absence, an employee shall be paid up to an amount of the difference between the witness fees and his/her existing shift earnings, exclusive of reimbursable travel expenses.

If an employee is subpoenaed as witness in court, before a Grand Jury or for a deposition on his/her regular day off on a matter related to his/her employment with the District, the employee shall be paid up to an amount of the difference between the witness fees and his/her applicable rate exclusive of reimbursable travel expenses. In such cases, the employee must provide to his/her supervisor a copy of the subpoena and a statement of the witness fees paid or payable as a condition of being paid.

The pay provisions of this Section shall not apply when an employee is required to appear in Court or at a deposition in any matter in which he/she is the plaintiff or as a result of any activities related to other employment.

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## **5.0 INSURANCE BENEFITS**

### **5.1 GROUP INSURANCE & DISTRICT SELF-FUNDED PLANS-GENERAL \***

The terms, conditions and provisions of all current group insurance policies issued by insurance companies to the District, or hereafter negotiated between the parties, and of all self-funded employee benefits plans, exclusive of the Money Purchase Pension Plan and Deferred Compensation Plan, under which individual employees are to receive benefits, are incorporated by reference herein and shall be controlling in all matters pertaining to benefits hereunder.

The District agrees that it will not change, or seek to change, the benefits under the group insurance policies, or under the self-funded benefit plans or fail to provide reasonable and customary claims services under which individual employees are to receive benefits, without mutual agreement of the parties to this Agreement.

The District agrees that it will promptly notify the Unions of any proposed changes to group insurance policies or self-funded benefit plans which may be mandated by law or required by insurers, or proposed by the District.

Married employees and employees in an eligible domestic partnership who both work for the District shall receive full coverage under group insurance policies and self-funded benefit plans. They shall each receive their allotted employee and dependent coverage. In no event will these employees or their dependents be entitled to such combined coverage in excess of their actual expenses.

Employees who are on non-job-related disability for two (2) continuous years or longer shall not be eligible for District-paid medical benefit plans while on such leave. The definition of a dependent for purposes of District-paid medical benefit plans shall be as follows:

- A. The covered employee's legally wedded spouse or domestic partner per Board Resolutions 4455 and 4757 and BART and health plan eligibility guidelines.
- B. The unmarried, a) natural born child, b) legally adopted child, c) step child, or d) child of the employee or the employee's domestic partner for whom the covered employee or employee's domestic partner became the legal guardian before age 19, who is under age 19 and dependent on the covered employee for their principal support and maintenance. This also includes any such child as listed above who is under age 23 (or under age 24 in accordance with the individual health plan) provided they are attending school on a continuous, full-time basis (12 units or more), at an accredited academic or vocational institution.

This also includes any such child as listed above who is incapable of sustaining employment by reason of mental retardation or physical handicap, if such was incurred prior to age 19 (or prior to age 23, or prior to age 24 in accordance with the individual health plan, if the child was attending school as a full-time student as defined above), provided the child resides in the covered employee's household or a custodial facility.

- C. Any unmarried child (including the eligible child of an employee's domestic partner) under age 19 (or prior to age 23, or prior to age 24 in accordance with the individual health plan, if attending school as a full-time student as previously defined) for whom the covered employee is mandated by court decree to provide health benefits.

Proof of dependency and/or incapacity must be furnished annually during the period specified by BART.

#### **\* Minute Clarification**

The parties agree that for the purposes of the above section, an employee's return to work would constitute a termination of the two-year disability termination of benefits as defined below:

Two or more periods of disability due to the same or a related injury or sickness shall be considered one period of disability unless separated by

the person's return to the full-time duties of his regular occupation for a continuous period of at least ninety (90) days.

The District will notify the employee after twenty-one (21) months of continuous disability of the pending termination of benefits.

**\* Minute Clarification**

The parties agree that the second paragraph of this Section means that the District will not make changes to current group insurance policies which adversely affects the level of benefits without agreement of the parties.

This Section shall not apply to benefits which are provided pursuant to Section 5.2, PERS-Medical & Prescription Drug Benefits, and Section 5.8, Survivor Benefits. Section 5.2, PERS-Medical & Prescription Drug Benefits and the PERS rules, regulations and plan documents shall control on all issues concerning medical and prescription drug benefits.

**\* Minute Clarification**

Living Trust - An employee who is diagnosed as terminally ill and is on disability shall have the option to collect his/her life insurance benefits subject to the terms, conditions and provisions of the Principal Financial Group's "Accelerated Benefits" plan.

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## **5.2 PERS-MEDICAL & PRESCRIPTION DRUG BENEFITS \***

### **A. PERS Medical and Prescription Drug Benefits**

The District will provide group medical and prescription drug benefits, as provided below, through the Public Employees' Retirement System (PERS). The PERS rules, regulations and plan documents will control on all issues concerning benefits, including the types and levels of benefits offered and eligibility for those benefits.

The Unions acknowledge that they understand these benefits may not equate to benefits previously available to employees and retirees through the various optional medical plans and the prescription drug plan. Because coverage will be provided through PERS, the District and the Unions understand that PERS may terminate or change covered expenses, benefit payments and co-payments on covered benefits, deductibles, lifetime and/or annual maximums and may implement various cost control features.

Except for Survivors Benefits, as provided for in Section 5.8, the Unions waive the right to any group medical or prescription drug benefit granted expressly or impliedly under other sections of this Agreement, or by any other agreement between the parties or by any District guideline, policy or practice if that benefit is not offered through the PERS medical plan.

## **B. Employee and Retiree Contributions for Health Insurance**

All employees eligible for PERS medical benefits who enroll for such benefits shall be responsible for a premium contribution in the amount of twenty-five dollars (\$25.00) per month, except as provided below.

1. The employee's twenty-five dollar (\$25.00) monthly employee contribution toward the medical insurance premium shall increase by fifty dollars (\$50) on January 1, 2006. Each January 1 thereafter, the monthly employee contribution shall increase by an escalator amount of three percent (3%). For example, the total monthly employee contribution on January 1, 2007 will be seventy-seven dollars and twenty-five cents per month. (The calculation that arrives at this number is as follows:  $\$25 + \$50 = \$75 \times 1.03 = \$77.25$ .) The employee contribution amounts provided below shall be in addition to any costs for coverage in excess of the amounts specified in paragraph C below.

<u>DATE</u>	<u>Maximum Employee Monthly Contribution</u>
01 Jan. - 06	\$75.00
01 Jan. - 07	\$77.25
01 Jan. - 08	\$79.57
01 Jan. - 09	\$81.95
01 Jan. - 10	\$84.41
01 Jan. - 11	\$86.95
01 Jan. - 12	\$89.55
01 Jan. - 13	\$92.24
01 Jan. - 14	\$95.01
01 Jan. - 15	\$97.86
01 Jan. - 16	\$100.79
01 Jan. - 17	\$103.82
01 Jan. - 18	\$106.93

01 Jan. - 19	\$110.14
01 Jan. - 20	\$113.44
01 Jan. - 21	\$116.85
01 Jan. - 22	\$120.35
01 Jan. - 23	\$123.96
01 Jan. - 24	\$127.68
01 Jan. - 25	\$131.51
01 Jan. - 26	\$135.46
01 Jan. - 27	\$139.52
01 Jan. - 28	\$143.02
01 Jan. - 29	\$148.02
01 Jan. - 30	\$152.46
01 Jan. - 31	\$157.03
01 Jan. - 32	\$161.74
01 Jan. - 33	\$166.60
01 Jan. - 34	\$171.59

- Each eligible retiree shall pay the same premium contribution as active employees. Employees' premium contributions will be paid for through tax-exempt payroll deductions. Retiree premium contributions will be deducted from the retirement allowance paid by PERS. If a retiree's retirement allowance is not sufficient to pay the entire contribution, the retiree must pay the balance due on such premium contribution directly to PERS. If such payment is not received by the due date, health care coverage will automatically, immediately and permanently cease. These rules are intended to comply with the premium contribution procedures established by PERS, which may be modified by PERS. The District, Unions and employees shall comply with the PERS procedures in effect from time to time.

### **C Maximum District Contributions for Health Insurance**

Beginning on January 1, 2010, the District shall contribute an amount up to the applicable level of plan participation (i.e. one party, two party, or family) and the same Medicare status as elected by the eligible employee or retiree equal to the Bay Area Basic Premium Rates for the PERS HMO Blue Shield Access + or PERS HMO Kaiser Plan, whichever is greater, less the employee and retiree

contributions provided for in 5.2B above. This District contribution shall be the District's maximum payment toward employee health insurance premiums. Employees and retirees electing coverage with a cost greater than the District's maximum contribution shall have the difference deducted automatically from the unit member's pay or as set forth in 5.2 B 2. above, in addition to amounts to be deducted in accordance with subsection B above.

#### D. Retiree Insurance Funding

1. Beginning July 1, 2007, the District shall contribute into its Retiree Health Benefit Trust ("RHBT") amounts that, at minimum, reflect an eight (8) year "ramp up" to District payment of the full Government Accounting Standards Board ("GASB") compliant Annual Required Contribution ("ARC") beginning July 1, 2013 using an open group valuation method with a closed 30 year amortization schedule for unfunded liability ending June 30, 2034. Except as provided in paragraph 3 below, each pay period the District shall contribute to the RHBT an amount equal to the below-listed percentages of straight time bargaining unit base pay paid to bargaining unit members in that pay period into the RHBT. (For example, if base pay in the pay period in FY 07 is one million dollars [\$1,000,000], the District will contribute \$34,900 into the RHBT for that pay period).

<u>Date</u>	<u>Percentage</u>
July 1, 2007 (FY 08)	3.49%
July 1, 2008 (FY 09)	3.64%
July 1, 2009 (FY 10)	3.79%
July 1, 2010 (FY 11)	3.94%
July 1, 2011 (FY 12)	4.10%
July 1, 2012 (FY 13)	4.27%

2. In addition, on or before June 30, 2009 the District shall, at minimum, contribute into the RHBT an amount equal to three and twenty-two one-hundredths percent (3.22%) of straight time bargaining unit base pay paid in FY 06 and three and thirty-six one-hundredths percent (3.36%) of straight time bargaining unit base

pay paid in FY 07. These figures represent the “ramp up” percentages for those fiscal years.

3. The District shall perform an actuarial study of the retiree medical insurance plan liabilities and funding needs (including the Annual Required Contribution – “ARC”) after the end of each fiscal year. For each fiscal year beginning with FY 2007, the actuaries shall adjust the above ramp up percentages for the fiscal year for which the study was prepared and for each remaining fiscal year in the ramp up period. The last such adjustment will be in the study performed prior to July 1, 2013 for FY 2013. The revised percentages shall be the percentages contributed by the District to the RHBT for those years, except that the District shall pay no less than the percentages specified in subsections 1 and 2 above.
4. Beginning July 1, 2013, the District shall, at minimum, contribute to the RHBT each pay period an amount equal to the full GASB compliant Annual Required Contribution (ARC) percentage of straight time base pay paid to bargaining unit members during that pay period using an open group valuation method with a closed thirty (30) year amortization schedule for unfunded liability ending June 30, 2034. (For example, if the base pay during the pay period is one million dollars [\$1,000,000] and the ARC percentage is fourteen percent [14%], the District will contribute one hundred forty thousand dollars [\$140,000] to the RHBT for that pay period.)
5. The District shall continue to retain all of the one and six hundred twenty-seven one-thousandths percent (1.627%) Money Purchase Plan contribution for the term of this agreement.
6. Effective July 1, 2013, the District shall retain the 1.627% MPPP contribution referred to in subsection D.5 above to the extent necessary to compensate the District for paying the difference between the actual ARC and the baseline ARC described below. The District shall retain this amount through June 30, 2034. In any year in which the actual ARC does not exceed the baseline ARC by an amount equal to the amount of the retained 1.627% MPPP contribution, the District shall pay the appropriate portion of the 1.627% into the employees’ MPPP accounts, but only to the extent that the difference between the actual ARC and the baseline ARC is less than the dollar value of the retained MPPP 1.627%.

EXAMPLE: Assume that the actual ARC is fifteen percent (15%) in the particular year, the baseline ARC is fourteen percent (14%) in

the particular year, and that the difference between the two is one million dollars (\$1,000,000). Assume further that the value of the retained 1.627% is one million five hundred thousand dollars (\$1,500,000). The District would then pay a total of five hundred thousand dollars (\$500,000) into the employees' collective MPPP accounts. These payments would be prorated in the same manner as would result from full payment of the 1.627% into the employee accounts.

The baseline ARC is as follows:

<u>FY Year Beginning</u>	<u>Baseline ARC</u>
7/1/13	11.88%
7/1/14	11.94%
7/1/15	12.00%
7/1/16	12.06%
7/1/17	12.12%
7/1/18	12.18%
7/1/19	12.24%
7/1/20	12.30%
7/1/21	12.36%
7/1/22	12.42%
7/1/23	12.48%
7/1/24	12.54%
7/1/25	12.60%
7/1/26	12.66%
7/1/27	12.72%
7/1/28	12.78%
7/1/29	12.84%
7/1/30	12.90%
7/1/31	12.96%
7/1/32	13.02%
7/1/33	13.08%

- Effective July 1, 2013 the District shall direct the Trustee of the RHBT to pay retiree health insurance premiums from the RHBT. No premiums will be paid from the RHBT prior to July 1, 2013.

#### **E. In Lieu of Medical Payments**

During any open enrollment period after July 1, 2009, an eligible employee who has medical coverage under a spousal or other alternate plan may elect, in accordance with procedures established

by the District to opt out of the group medical and prescription drug benefits covered under Section 5.2(A) ("5.2A Coverage").

The District shall make a monthly payment of \$100.00 "in lieu of medical" to each eligible employee who opts out of 5.2A coverage.

Tax treatment of these payments will be subject to applicable Internal Revenue Code ("IRC") and Internal Revenue Service ("IRS") rules. The payments will be made in a manner that will not impact the income tax status of medical premiums under IRC requirements and to allow an employee to receive the amounts as cash monthly payments.

An eligible employee who opts out of 5.2(A) coverage may subsequently enroll in such coverage as permitted under the terms of the plan(s) described in Section 5.2(A).

#### **F. Trust Review Committee**

1. The District's five (5) unions shall each appoint one (1) member to serve on a trust review committee ("TRC"). The District Labor Relations Manager and Human Resources Manager shall serve on the TRC for the District. The TRC shall meet quarterly. Employee members of the TRC will be released from regularly scheduled duty with pay for quarterly TRC meetings.
2. The District will direct the Trustee of the Trust to provide the Unions with quarterly reports of all RHBT operations, including audited and unaudited financial statements and investment performance reports, and other consultant reports in advance of the quarterly TRC meeting. (The parties acknowledge that audited financial statements are performed only once per year.)
3. The Trustee will attend the TRC meeting to answer questions concerning the information provided to the TRC. However, the TRC shall in no way attempt to assist, direct, or otherwise involve itself in matters concerning the investment of Trust assets. However, the TRC may advise the Trustee on other Trust matters to the extent such advisory activity does not affect the legal status of the Trust. It shall be within the sole discretion of the Trustee whether to follow or not follow such advice.
4. The TRC members shall be released from regularly scheduled duty with pay to attend meetings of the Human Resources Manager and Labor Relations Manager with the District's actuaries and other professionals to discuss assumptions to be included in annual GASB

valuation studies, the preliminary and final results of such studies, etc. Such studies shall include ARC projections through at least 2035. The District will provide the unions with a copy of the final version of such study on or before February 1 each year or as soon thereafter as is practicable.

#### **G. Retiree Health Benefits Trust**

Within one hundred twenty (120) days after the signing of this agreement by the parties hereto, the District shall amend the Trust Agreement to provide that:

1. Trust assets shall be held for the sole and exclusive purpose of providing health benefits to eligible BART retirees and to defray the reasonable expenses of administering the RHBT.
2. The only District benefit plans for which payments may be made from the RHBT shall be those retiree health benefit plans offered to eligible District retirees as a result of its collective bargaining agreements, or District policy which extends such plans to non-represented employees. In addition, for District personnel on a District plan that is no longer generally offered to District employees, payments may be made from the RHBT. However, the District shall ensure sufficient separate funding and the Trustee shall separately account for benefits paid for such personnel.
3. The District may terminate the RHBT, subject to its duty to bargain in good faith to agreement or impasse over such termination with the union. If the District gives the Unions notice of the termination of the RHBT, the Trust shall not terminate until the assets then remaining are exhausted. Such assets shall be used only as provided in paragraph 1 above.

The District reserves the right to terminate or change any part or all of the health benefits program at any time with respect to active or retired employees, however, any such action will be taken only after the District has satisfied its obligations under applicable Collective Bargaining Agreements. The District's contractual obligation to provide health benefits coverage to retired employees shall terminate upon the expiration of this Agreement. By providing benefits to retirees, the parties do not intend to vest retirees with such benefits.

**\* Minute Clarification**

Members who would like to realize the benefit of the in lieu payment as a pre-tax contribution to their deferred compensation accounts can accomplish this result by increasing their deferral amount for the deferred compensation plan by the amount of the in lieu payment, subject to Internal Revenue Code limitations on maximum annual contributions.

**\* Minute Clarification**

The parties mutually understand that the only obligation to continue the health benefits of active employees after the expiration of the Agreement is that which may arise from the general legal duty to bargain in good faith.

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**5.3 DENTAL PLAN \***

Present coverage for preventative care, restorative care, prosthodontics care and orthodontic care will continue. Coverage will be as follows:

- A. **Preventative Care:** Insurance will pay one hundred percent (100%) of Usual and Customary charges.
- B. **Restorative Care:** Insurance will pay ninety percent (90%) of the Usual and Customary charges, with the employee paying the balance.
- C. **Prosthodontics:** Insurance will pay ninety percent (90%) of the Usual and Customary charges, with the employee paying the balance.
- D. **Orthodontics:** Insurance will pay seventy five percent (75%) of the Usual and Customary charges, with the employee paying the balance.

Maximum benefit payable for a combination of preventative, restorative and prosthodontic care is two thousand dollars (\$2,000) for each calendar year. Each calendar year, the employee may place the maximum benefit payable for preventative, restorative and prosthodontic care for each employee and dependent in a family bank. Maximum benefit payable for orthodontic care is three thousand five hundred dollars (\$3,500) lifetime maximum with fifty dollars (\$50) deductible for employees and dependents.

**\* Minute Clarification**

Employees shall have the option to purchase, at their own expense, an enhanced dental plan. Benefits and premiums shall be established by

the District annually based on plan experience. Premiums for this benefit will be paid through payroll deduction.

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#### 5.4 VISION CARE \*

The District will continue to provide a Vision Care Plan for employees, an employee's eligible domestic partner (per Board Resolutions 4455 and 4757) and their eligible dependents providing the following:

Coverage	Intervals
Visual Examinations	12 months
Lens Replacement	12 months
Frames Replacement	24 months

There shall be a ten dollar (\$10) deductible. The District shall pay the full premium for all employees and eligible dependents.

#### \* Minute Clarification

Employees shall have the option to purchase, at their own expense, an enhanced Vision Care Plan. Benefits and premiums shall be established by the District annually based on plan experience. Premiums for this benefit will be paid through payroll deduction.

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#### 5.5 GROUP LIFE

The District will continue to provide a basic group life insurance policy for each employee equivalent to one (1) times the employee's base rate annual salary (two thousand and eighty [2,080] hours times base straight time hourly rate) with accidental death and dismemberment provisions.

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#### 5.6 VOLUNTARY / ADDITIONAL LIFE INSURANCE \*

Effective July 1, 1989, all bargaining unit employees are eligible to purchase voluntary life insurance with accidental death and dismemberment provisions. Non-supervisory and non-professional employees may purchase insurance equivalent to one (1), two (2) or three (3) times the employee's base rate annual salary. Supervisory and professional employees may purchase insurance equivalent to one (1) or two (2) times the employee's base rate annual salary. The full cost of

the premiums are to be paid by the employee through payroll deduction.

In addition, supervisory and professional employees classified Foreworkers and above may elect to purchase Additional Life Insurance, which is equivalent to one (1) times the employee's base annual salary with accidental death and dismemberment provisions. Fifty percent (50%) of the cost of the Additional Life Insurance premiums will be paid by the District and fifty percent (50%) will be paid by the employee through payroll deductions.

Each year between September 1 and September 30 there shall be an annual application period for all eligible employees to apply for voluntary and/or additional life insurance.

All new hire employees shall be eligible to apply, as described above within the first thirty-one (31) days of employment.

Eligibility of existing and new hire employees to participate in the voluntary and/or additional life insurance program(s) during the initial or annual application period(s) shall be subject to timely application and medical certification of insurability.

#### **\* Minute Clarification**

The language changes or deletions reflected in this section from that in the 1985-88 Agreement, are for administrative purposes only and do not represent a change in life insurance benefit.

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### **5.7 ASSAULT INSURANCE**

The District will provide Assault Insurance as indicated under the existing insurance policy in the amount of fifty thousand dollars (\$50,000) for each District employee in the bargaining unit.

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### **5.8 SURVIVOR BENEFITS**

Subject to the restrictions, limitations and eligibility requirements of the applicable health plans, for employees who elect a survivor benefit, the District will pay a portion of premiums or provide reimbursement for the enrollment of their previously eligible covered survivor(s) in the medical, dental, and vision care plans upon the death of the employee. The cost for this program is fifteen dollars (\$15) per month. After the employee's

death, the survivor must continue to contribute fifteen dollars (\$15) per month to receive medical, dental, and vision coverage.

Part-time employees (less than forty [40] hours per week) and employees who are ineligible for District health plan coverage, including, without limitation, limited term intermittent employees, are ineligible for the Survivor Benefits Program.

In order for the survivor of an employee or retiree who dies before the effective date of this Survivor Benefits Program to be eligible for survivor benefits, the employee and survivor must have been covered by District medical benefits at the time of termination by death or retirement and the survivor must have been participating in the prior Survivor Benefits Program on June 30, 1994 and have remained enrolled up to the effective date of this program. In order for the survivor of an employee or retiree who dies after the effective date of this Survivor Benefits Program to be eligible for survivor benefits, the employee/retiree and survivor must have been covered by District medical benefits and enrolled in the Survivor Benefits Program at the time of death.

This benefit shall be made available to active employees enrolled in the prior Survivor Benefits Program on June 30, 1994, provided they are enrolled through the effective date of this program, and to active eligible employees who elect to enroll during a one-time only thirty-day open enrollment period beginning on or about January 1, 1995. Active employees who elect Survivor Benefits during the January 1995 open enrollment period shall, as a condition of enrollment, pay an amount equal to fifteen dollars (\$15) per month retroactive to an initial premium date which shall be April 1, 1992, or their date of hire, whichever is later. Said initial premium shall be collected through payroll deduction in addition to the fifteen dollars (\$15) per month assessment for on-going participation in the program. This benefit shall be made available to eligible new hires when they commence the fifteen dollars (\$15) monthly assessment within thirty (30) days of hire. Former employees who retired prior to the effective date of this Survivor Benefits Program are not eligible for this program unless they were enrolled in the Survivor Benefits Program on June 30, 1994 and continue to participate through the effective date of this program. Survivors of employees or retirees who were enrolled in the Survivor Benefits Program on June 30, 1994 and continued to participate through the effective date of this program will be eligible for this or a similar reimbursement benefit described below.

Failure to pay the required fifteen dollars (\$15) per month assessment by the due date established by the District shall permanently and irrevocably terminate eligibility for the Survivor Benefits Program.

The various categories of individuals eligible to elect this program, and the additional conditions applicable to each category, are described below.

#### **SURVIVORS OF EMPLOYEES WHO DIE IN SERVICE AFTER THE EFFECTIVE DATE OF SURVIVOR BENEFITS PROGRAM**

The survivors of employees who were not eligible for a PERS retirement allowance and who die in service after the effective date of the Survivor Benefits Program are eligible for benefits if they are eligible under the optional PERS Survivor Benefits Program provided for at Government Code Section 22819 (the optional program). The District will pay the entire premium to PERS for the optional program upon payment of the fifteen dollars (\$15) per month contribution.

The survivors of employees who were eligible for a PERS retirement allowance and who die in service after the effective date of the Survivor Benefits Program are eligible for survivor benefits only if the survivors are receiving a survivor's allowance from PERS and having the survivor's portion of the retiree medical premium withheld from the allowance. They will be reimbursed for the difference between the amount withheld and the required fifteen dollars (\$15) per monthly contribution. However, if the surviving spouse is not eligible for a PERS annuity only because he/she was married to the employee for less than a year, or only because he/she was a PERS annuitant and became ineligible for an annuity because of remarriage, the District will provide medical benefits as follows:

1. If the survivor meets the eligibility requirements for the optional PERS program, the District will pay the entire premium to PERS for the optional program upon payment of the fifteen dollars (\$15) per month contribution;
2. If the survivor does not meet the eligibility requirements for the optional program, the District will reimburse the survivors for medical premiums paid for any medical plan or coverage in which they may participate, less the required fifteen dollars (\$15) per month contribution. The maximum medical reimbursement will be based on the highest PERS medical plan premium applicable to their covered family size or the actual cost of their medical insurance, whichever is

lower. Reimbursement will be made on a monthly basis. Proof of payment of medical premiums shall be required.

#### **SURVIVORS OF EMPLOYEES WHO DIED IN SERVICE AFTER 11/17/88 BUT BEFORE EFFECTIVE DATE**

The survivors of employees who died in service after November 17, 1988 but before the effective date of this program who were enrolled in the prior Survivor Benefits Program on June 30, 1994, and remained enrolled through the effective date of this program may participate in this Survivor Benefits Program. If eligible survivors are receiving a survivor's allowance from PERS and having the survivor's portion of the retiree medical premium withheld from the allowance, they will be reimbursed for the difference between the amount withheld and the required fifteen dollars (\$15) per month contribution. If the survivors are not receiving a survivor's allowance from PERS, the District will provide dental and vision coverage and will reimburse the survivors for medical premiums paid for any medical plan or coverage in which they may participate, less the required fifteen dollars (\$15) per month contribution. The maximum medical reimbursement will be based on the highest PERS medical plan premium applicable to their covered family size or the actual cost of their medical insurance, whichever is lower. Reimbursement will be made on a monthly basis. Proof of payment of medical premiums shall be required.

#### **SURVIVORS OF RETIREES WHO DIED AFTER 11/17/88 BUT BEFORE EFFECTIVE DATE**

The survivors of retirees who died after November 17, 1988 but before the effective date of this program who were enrolled in the prior Survivor Benefits Program on June 30, 1994, and remained enrolled through the effective date of this program may participate in this Survivor Benefits Program. If eligible survivors are receiving a survivor's allowance from PERS and having the survivor's portion of the retiree medical premium withheld from the allowance, they will be reimbursed for the difference between the amount withheld and the required fifteen dollars (\$15) per month contribution. If the survivors are not receiving a survivor's allowance from PERS, the District will provide dental and vision coverage and will reimburse the survivors for medical premiums paid, less the required fifteen dollars (\$15) per month contribution. The maximum medical reimbursement will be based on the highest PERS medical plan premium applicable to their covered family size or the actual cost of their medical insurance, whichever is

lower. Reimbursement will be made on a monthly basis. Proof of payment of medical premiums shall be required.

#### **SURVIVORS OF RETIREES WHO DIE AFTER EFFECTIVE DATE OF PROGRAM**

The survivors of retirees who retired before the effective date of this program but who die after the effective date are ineligible to participate in this program unless the retiree was enrolled in the prior Survivor Benefits Program on June 30, 1994 and remained enrolled through the effective date of this program. Benefits for such survivors shall be provided in the same manner as for eligible survivors of retirees who died before the effective date of this program as provided above. If an employee who is enrolled in this Survivor Benefits Program retires after the effective date and then dies, his or her survivors are eligible for dental and vision coverage, but medical coverage will be provided only if the survivors are receiving a PERS survivor's allowance and having the survivor's portion of the retiree medical premium withheld from the allowance. They will be reimbursed for the difference between the amount withheld and the required fifteen dollars (\$15) per month contribution. However, if the PERS survivor's allowance is not available only because the survivor and employee were married less than one year, or because the survivor remarries, then the District will reimburse the survivor for medical premiums paid, less the required fifteen dollars (\$15) per month contribution. The maximum medical reimbursement will be based on the highest PERS medical plan premium applicable to their covered family size or the actual cost of their medical insurance, whichever is lower. Reimbursement will be made on a monthly basis. Proof of payment of medical premiums shall be required.

The District reserves the right to terminate or change any part or all of the Survivor Benefits Program at any time with respect to active or retired employees or survivors. However, any such action will be taken only after the District has satisfied its obligations under applicable Collective Bargaining Agreements. The District's obligation to provide survivor benefits coverage shall terminate upon the expiration of this Agreement.

The effective date of this Survivor Benefits Program shall be the first day of the second month following the effective date of the PERS Medical contract.

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## 5.9 DISABILITY COVERAGE

A. **Short-Term Disability Coverage** - The District will continue to maintain Short-Term Disability coverage at the following rates:

Weeks of Disability	Maximum Salary	Maximum Benefit
1 <sup>st</sup> – 26 <sup>th</sup>	\$1260 x 66 $\frac{2}{3}$ %	\$840

At no time will disability coverage be less than level mandated by State law.

B. **Long-Term Disability** - The District will continue to maintain Long-Term Disability coverage with a maximum monthly benefit of sixty-six and two-thirds percent (66- $\frac{2}{3}$ %) of the base monthly salary to a maximum insured salary of two thousand dollars (\$2,000) per month. Maximum benefit - one thousand four hundred fifty-six dollars (\$1,456.00) per month for weeks twenty-seven (27) through fifty-two (52) and one thousand three hundred thirty-four dollars (\$1,334.00) for weeks fifty-three (53) and any subsequent week.

### C. Employee Purchase of Additional Coverage

1. **Short-Term Disability Coverage** - Employees may purchase additional Short-Term Disability coverage up to the following rates:

Weeks of Disability	Maximum Salary	Maximum Benefit
1 <sup>st</sup> – 4 <sup>th</sup>	\$800.00 x 66 $\frac{2}{3}$ %	\$533.00
5 <sup>th</sup> – 26 <sup>th</sup>	\$931.00 x 66 $\frac{2}{3}$ %	\$621.00

Premiums for this additional coverage shall be fully paid by the employee.

2. **Long-Term Disability Coverage** - Employees may purchase additional Long-Term Disability coverage to assure payment of up to sixty-six and two-thirds percent (66- $\frac{2}{3}$ %) of the employee's base monthly salary to a maximum insured salary of three thousand dollars (\$3,000) per month. The maximum monthly benefit is two thousand dollars (\$2,000). Premiums for this additional coverage shall be fully paid by the employee.

Eligibility of employees to purchase additional Short-Term and/or Long-Term Disability coverage shall be subject to medical certification of insurability.

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#### **5.10 EMPLOYEE ASSISTANCE PROGRAM**

- A. The parties agree that the District will continue a referral program for the purpose of assisting in a confidential manner employees and their families with marital, psychological, alcohol, drug, child, elder and other dependent care needs, domestic violence, financial, legal and other problems to obtain counseling and other services. A twenty-four (24) hour crisis intervention service will be available at all times. Child care and other dependent care services, including those with emergency availability, are also available.
- B. The Unions agree to cooperate with the District in the administration of this program.

The District shall retain a consultant to provide referrals as appropriate in the above-described problem areas. The District shall pay the cost of this consultant's referral services, which will constitute the entire District monetary contribution to this program.

The costs for all other services provided to employees or their families under this program shall be borne by the participating employee/family member to the extent such services are not covered by the employee's medical or other benefit plans.

The District shall distribute informational materials in order to inform employees of the EAP program and the services provided and shall provide union stewards and officials with training regarding the nature and extent of said programs and otherwise provide the unions with information as may be requested regarding the nature and extent of all such programs.

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#### **5.11 BENEFITS REVIEW**

The District and the Unions agree that the Department Manager of Human Resources or his/her designee and top Union Officials/consultants shall meet annually between the months of March and May to discuss the District's benefits plans. This discussion may include a review of the status of the plans, the preceding year's experience under

the plans, levels of coverage, alternative benefits, and other matters relating to employee benefits.

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## **6.0 RETIREMENT BENEFITS**

### **6.1 PUBLIC EMPLOYEES' RETIREMENT SYSTEM**

The District shall amend its contract with the Public Employee's Retirement Systems (PERS) to provide the two percent (2%) at 55 retirement option for miscellaneous members in the bargaining unit. This change shall become effective August 31, 1992 or as soon thereafter as practicable. The District will take all reasonable steps necessary to implement this amendment so that it can be effective on August 31, 1992 or as soon thereafter as practicable. Except for this change, the District shall continue its present participation in PERS for miscellaneous members at existing levels.

To partially offset the cost of this new benefit, effective September 1, 1991 the District shall retain its contribution of one point six hundred twenty-seven percent (1.627%) of payroll to the District's Money Purchase Pension Plan on behalf of members in the bargaining unit. The retention of the 1.627% contribution shall remain in effect to and including June 30, 2013. The payment of these contributions between July 1, 2013 and June 30, 2034, is subject to the terms of Section 5.2.

The Union shall approve all changes and execute all documents including, without limitation, documents relating to the PERS contract and the Money Purchase Pension Plan necessary to implement the 2% at 55 retirement benefit, and the change in the District's Money Purchase Pension Plan contribution rate.

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### **6.2 PERS PICK UP**

The District shall continue to pick up the employee's contribution to the Public Employees' Retirement System (PERS). During the life of this Agreement, earnings may accrue to the District by reason of a reduction of the District's or employees' contribution to PERS.

The District agrees that should the current rate of employee contribution to PERS increase during the term of this Collective Bargaining Agreement, the District shall include such rate increase in the affected pick up due subsequent to the rate increase. The parties agree that any

additional cost to the District resulting from any increase in the percentage level of employee contributions occurring after November 1979 shall be borne by the District until the expiration of this agreement.

Each employee is solely and personally responsible for any federal, state or local tax liability of the employee that may arise out of receipt of said pick up by the District or any penalty that may be imposed therefore.

The parties recognize that it may be contended that some of these payments were unlawful and that they could not have been made in the absence of an amendment to the District's contract with PERS and recognize further that BART has not sought such an amendment.

Should the District be required to reimburse PERS for back contributions related to these payments, BART's pick up of employee PERS contributions will cease until an amount equivalent to the amount required to be reimbursed to PERS has been placed by BART in an escrow account pending mutual agreement by the parties as to alternative benefit(s). Such benefit(s) shall not increase BART's aggregate direct or indirect payroll cost above the amount it would otherwise have incurred by continuation of the PERS pick up program.

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### **6.3 PENSIONERS' LIFE INSURANCE**

Life insurance will be provided to all employees who retire from the District as follows:

- A. First year of retirement, fifty percent (50%) of the basic group life insurance;
- B. Second year of retirement, forty percent (40%) of the basic group life insurance;
- C. Third year of retirement, thirty percent (30%) of the basic group life insurance;
- D. Fourth and subsequent years of retirement, twenty percent (20%) of the basic group life insurance.

This section is subject to the provisions of Section 5.1 "Group Insurance and District Self-Funded Plans".

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#### 6.4 MONEY PURCHASE PENSION PLAN

- A. The District will continue to deposit an amount equivalent to six and sixty-five one hundredth's percent (6.65%) of the employee's base rate monthly compensation (after deducting the first one hundred thirty-three dollars and thirty-three cents [\$133.33] paid during the month) up to a maximum annual contribution of one thousand eight hundred and sixty-eight dollars and sixty-five cents (\$1,868.65) into a Money Purchase Pension Plan for employees. The base rate monthly compensation equals one hundred seventy-three and one third (173.33) hours times base straight time hourly rate.
- B. Additional Contributions to Employees' Money Purchase Pension Plan or Retiree Health Benefits Trust during PERS Superfunding.
1. Except as provided below, beginning October 1, 2001, and for the period(s) during which the District's PERS account is superfunded, the District shall make an additional contribution to each employee's Money Purchase Pension Plan account in the amount of 3.5% of gross straight-time wages. This contribution is 50% or one half of the 7% PERS Employer Paid Member Contribution (EPMC). The other 3.5% will be available to the District for discretionary obligations and purposes. The 7% EPMC will be discontinued during the period(s) of superfunding.
  2. If the District's employer PERS account becomes superfunded in any fiscal year commencing before the fiscal year beginning July 1, 2034, and if in the next fiscal year the RHBT has an unfunded actuarial liability as determined by the District's actuaries, then the District shall, at the commencement of the fiscal year after superfunding status begins, discontinue its payment of the EPMC for members of the bargaining units from the operating budget and shall instead direct an equal amount into the District's Retiree Health Benefit Trust.

If the District's employer PERS account loses superfunding status, the payments provided in section B.1 or B.2 of this section, whichever applies, shall cease and the District shall resume payment of the employee PERS contribution from the operating budget.

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#### 6.5 PERS RATE REDUCTIONS

Any PERS savings accrued by the District on or after July 1, 1989 remain

the property of the District and shall not be shared with employees.

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## **6.6 ADDITIONAL PERS OPTION**

By January 1, 1995, the District will amend its PERS contract to permit employees to purchase up to four (4) years of service credit for any continuous active military service prior to employment with BART pursuant to Government Code Section 20930.3. The employees will bear all costs for this PERS option.

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## **7.0 TRANSPORTATION**

### **7.1 PASS PRIVILEGES**

The District will provide free transportation over its lines during normal hours of operation to full-time employees and pensioners and their spouses and dependent children, provided they properly display their District identification card.

Dependent children under the age of five (5) years will not be required to display their identification cards. Dependent children include unmarried children (including legally adopted children) to their nineteenth (19<sup>th</sup>) birthday, or to their twenty-third (23<sup>rd</sup>) birthday if they are enrolled full-time at an accredited institution of learning, provided such children are dependent on the employee for their support and maintenance.

There will be a ten dollar (\$10) fee to replace an employee's identification card.

In any twelve (12 month period): Dependents will be charged a ten dollar (\$10) fee to replace a dependent's first identification card. The fee to replace any subsequent dependent's identification card shall be twenty dollars (\$20). On the third request, and any subsequent requests, the fee to replace the identification card shall be twenty dollars (\$20) and there will be a three (3) month waiting period. These fees may be waived by the District upon verifiable proof of the reasonableness of loss or destruction.

The District will provide five (5) identification cards for ATU Local 1555 and ten (10) identification cards for SEIU 1021 for representatives designated by name by the Unions authorizing free transportation on the system.

Failure to properly display identification or any attempt to misuse this privilege will be cause for refused entry into the system, revocation of privilege and/or disciplinary action.

Pass privileges will be revoked when an employee is terminated from the District.

Spouse's and eligible dependent children's pass privileges shall continue upon the retirement of an employee. When an employee who has retired from District services dies:

- A. his/her spouse's pass privileges shall terminate upon the surviving spouse's remarriage;
- B. eligible dependent children's pass privileges shall terminate five (5) years after the retiree's death or upon the expiration of the time periods set forth in this Section, whichever occurs first.

If an employee dies as the result of a District job-related accident, the following shall occur:

1. If the employee has been employed by the District for less than five (5) years, the surviving spouse's pass privileges shall terminate five (5) years after the employee's death or upon the surviving spouse's remarriage, whichever occurs first.
2. If the employee has been employed by the District for more than five (5) years, the surviving spouse's pass privileges shall terminate upon the spouse's remarriage;
3. Eligible dependent children's pass privileges shall terminate five (5) years after the employee's death or, upon the expiration of the time periods set forth in this Section, whichever occurs first.

If an employee dies as a result of a non-job-related injury or illness, and at the time of death he/she has been an employee of the District for at least five (5) years and is at least fifty (50) years of age, the employee's surviving spouse's pass privileges shall terminate upon the spouse's remarriage.

An employee's eligible domestic partner and their eligible children shall be entitled to the same pass privileges under this section as spouses and dependent children of the employee, per Board Resolutions 4455 and 4757.

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## 7.2 TRANSPORTATION, WORK RELATED

The District shall ensure that employees assigned during the work shift to another District work location shall be returned to their bid work location. Until returned to bid location, the employee shall be considered on duty.

Should an employee be assigned to report at the commencement of any shift or during any shift to a work location other than the reporting location selected by bid, the time required to go to and from the normal working location shall be considered as time worked.

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## 7.3 TRAVEL ALLOWANCE

- A. **Travel Expense - Local:** Insofar as possible, authorized travel within the District shall be by local transit facilities or by District automobile. In the event taxicab use is necessary, actual reimbursement shall be paid. In the event private automobile is used, the Internal Revenue Service Standard Mileage Rate will be paid by the District in addition to actual parking and toll fees. While on assigned District business away from the employee's assigned office or area, reimbursement for lunch expense will be that portion of the lunch expense that is in excess of that which would normally be paid were the employee working at the office or area. Reimbursement under this policy shall not exceed twelve dollars (\$12) per luncheon.
- B. **Travel Expense - Outside of District:** Travel for distances in excess of one hundred fifty (150) miles will be provided by public carrier. Mode of travel and commencement of travel status will be determined by the District prior to departure. Hotel charges will be reimbursed at actual cost. Actual costs of meals will be reimbursed when traveling outside the District. Other necessary travel expenses including, but not limited to, local transportation, telephone, laundry and cleaning, will be reimbursed on the basis of actual cost to employee.
- C. **Travel Allowance:** When assigned outside the District in excess of twenty-four (24) hours, employees of the District may, in lieu of receiving reimbursement for actual costs of travel, elect to receive actual receipted cost of lodging, plus an allowance as established by the District's Management Procedure No. 20, Section II, Travel Outside The District as reimbursement for all other travel costs. This allowance will be allowed in full on the day of departure and return without regard for time of departure or arrival.

D. Employees may choose either "B" or "C" for travel expenses. If "B" is selected, a reasonable cash or check advance in such sums as may be deemed necessary, considering the character of the expense, shall be made.

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## 8.0 PAY PROCEDURES

### 8.1 PAY PERIODS \*

All hourly employees shall be paid bi-weekly on every other Friday on an hourly rate basis, except that Staff Assistants shall continue to be considered salaried and shall be paid twice a month on the 15<sup>th</sup> and last day of the month, until such time as the District is able to establish and implement a bi-weekly payroll system for all District represented and non-represented employees. When that occurs, Staff Assistants shall continue to be considered salaried and shall be paid bi-weekly every other Friday.

The District shall make available an electronic direct deposit system for payroll checks. As a condition for participating in the electronic direct deposit payroll system, any correction necessary for payment made in error, other than for regular straight time hours worked, which cannot be adjusted in the current pay period will be adjusted in full on the next following pay period's direct deposit subsequent to receipt of written notification to Payroll. If the correction is not made in the next following pay period's direct deposit, the District will make the correction as set forth below.

Except for employees participating in direct deposit, employees whose regular day off/holiday falls on a payday shall receive their payroll checks prior to the end of their shifts on the preceding day. Should checks be available at the employee's work site on the day preceding the regular payday, they shall be distributed to such employees requesting same, but in no event prior to 4:00 p.m. on the day preceding the regular payday.

Pay periods shall remain as established unless changed by mutual agreement.

There shall not be more than five (5) days' holdback of pay for any employee.

The District shall continue the present system of itemized deductions, and all adjustments shall be clearly defined on the statement portion of

the check. All shortages above fifty dollars (\$50) shall be corrected within the time limits set below. The employee's immediate or appropriate supervisor shall assure that the documentation necessary to correct the shortage has been delivered to Payroll within one (1) work day, exclusive of weekends and holidays, after he/she receives written notification of the shortage from the employee. Payroll shall correct the shortage and cause a check to be available at the employee's normal work location within three (3) Accounting work days, exclusive of weekends and holidays, after receipt of written notification.

All other shortages shall be added to the next paycheck.

In the event an overpayment of fifty dollars (\$50) or less is made in error, it shall be deducted from the employee's first regular paycheck, following discovery of such overpayment.

Except for employees participating in direct deposit, any employee taking a scheduled vacation shall be provided an advance paycheck, provided such payday falls within the scheduled vacation period and provided a written request is submitted to the District no less than five (5) Accounting workdays prior to the scheduled vacation.

Final termination paychecks shall be issued to terminating employees within seventy-two (72) hours after such termination becomes effective.

The District will promptly process Public Employees' Retirement System refund forms following an employee's termination.

#### **\* Minute Clarification**

The parties have reached the following understanding with respect to repayment of overpayments made to employees. This understanding also applies to overpayments made pursuant to the electronic direct deposit system.

Where repayment of the entire amount of the overpayment in a lump sum would work a hardship on the affected employee, the Union may request development of a reasonable repayment schedule through Human Resources. Such request will not be unreasonably denied by Human Resources.

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## **8.2 COST OF LIVING / WAGE ADJUSTMENT**

All employees covered by this Agreement shall be covered by the provisions for a cost of living increase as set forth in this Section.

The wage rates as contained in this Agreement shall not be reduced by application of this Cost of Living Provision. In addition to the wage rates contained in this Agreement, all employees shall be paid cost of living adjustments to be determined on the basis of the "Urban Wage Earners and Clerical Workers" Consumer Price Index (United States Average, revised base 1967 = 100), published by the Bureau of Labor Statistics, United States Department of Labor, in the manner described in this Section (hereafter referred to as the "Index").

- A. Effective on June 30, 2013, a Cost of Living Adjustment shall be granted to the wages/salaries of all employees subject to this Agreement equal to one-cent (1¢) per hour for each full point four (.4) of a point change in the Consumer Price Index as measured on the basis of movement of the Index published for the month of May, 2013 over the Index published for the month of February, 2013.
- B. All Cost of Living Adjustments specified in Paragraph A of this Section for salaried employees shall be at the monthly equivalent of the hourly adjustment (the cost of living cent adjustment times two thousand eighty hours [2,080] hours divided by twelve [12] months = monthly equivalent of the hourly adjustment.)
- C. The resulting Cost of Living Allowance shall be used in the computation of pensions, straight time and overtime pay exactly as though the wage rates had been changed by the allowance. However, the allowance shall not be added to the base wage rates.
- D. The District, during the negotiations for a succeeding term after June 30, 2013, shall not assert that the Cost of Living Allowance increase effective on June 30, 2013 is included as part of any increased wage offer made by the District for the succeeding contract.

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### **8.3 TRANSFERS WITHIN THE UMBRELLA BARGAINING UNIT**

- A. Employees transferring within the umbrella bargaining unit shall not be considered as new hires.
  - B. Umbrella unit employees of the District who bid and are awarded a higher paying position within the bargaining unit shall be paid no less than the base salary rate of the lower position.
  - C. All entry level and training rates of pay are eliminated effective July 1, 1997.
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## 9.0 SICK LEAVE & DISABILITY

### 9.1 SICK LEAVE

**A. Accrual:** Covered employees shall accrue one (1) day of sick leave for each full month of employment. Sick leave credits may be accumulated to a total of two hundred fifty (250) working days.

#### **B. Incentives For Sick Leave Accrued And Unused On Or After October 19, 2009**

To encourage employees to maintain maximum attendance and to improve performance, the District offers employees the following two (2) incentives beginning October 19, 2009:

- 1. PERS Retirement Service Credit For Sick Leave:** The District will amend its contract with CalPERS to provide the California Government Code Section 20965 option for service credit for unused sick leave for eligible CalPERS members in the bargaining unit, with an effective date of October 19, 2009. The Public Employees Retirement Law (PERL) and CalPERS rules will govern the eligibility of unused sick leave earned on or after October 19, 2009 for service credit. Those rules presently grant 0.004 years of service credit for each certified unused day of sick leave accrued by the member during the normal course of his/her employment. For employees whose effective date of retirement is within four months of separation from employment with the District, the District shall certify to CalPERS all such unused days of sick leave that were accrued by the employee on or after October 19, 2009. For purposes of Government Code Section 20965, leave accrued prior to October 19, 2009 shall not be considered "unused" sick leave and the District will not certify such sick leave to CalPERS, unless the employee has made the one-time election to convert such pre-October 19, 2009 sick leave to PERS credit eligible sick leave pursuant to Paragraph C below.
- 2. Annual Buy-Back Or MPPP Incentive:** The District shall give employees the option each year to make an irrevocable election on the schedule indicated below to buy-back or to deposit into their Money Purchase Pension Plan (MPPP) accounts, the dollar value of the sick leave earned within the annual accrual period indicated in paragraph B(2)(a) below, less sick leave taken during that same period, on an after tax basis.

- a. **Sick Leave Accrual/Election Periods:** The maximum sick leave which may be earned for each accrual period is ninety-six (96) hours for employees on a 5-8 or 9/80 Work Plan and one hundred twenty (120) hours for employees on a 4-10 Work Plan. Sick leave for which such an election has been made shall not be included by the District in the certification to CalPERS under the retirement service credit plan described above.

Election Period	Accrual Period
9/1/09 – 9/15/09	9/21/09– 9/19/10
9/1/10 – 9/15/10	9/20/10 – 9/18/11
9/1/11 – 9/15/11	9/19/11 – 9/16/12
9/1/12 – 9/15/12	9/17/12 – 9/15/13

- b. **Buy-Back/MPPP Deposit Amounts:** An election to “buy-back” or to deposit into the MPPP must also include an election as to the percentage amount of the ‘buy-back”, based on the percentage increments and maximums provided below. The maximum Buy-Back percentage that will be allowed is based on the employee’s attendance record during the accrual period.

Days	Eligible Percentage of Unused Earned Sick Leave
0	5% up to 50% (in 5% increments)
1-3	5% up to 40% (in 5% increments)

Buy-Back and MPPP amounts shall be calculated at the employee’s base rate of pay at the end of the accrual period, less applicable tax withholding.

- c. **Impact Of Buy-Back/MPPP Election:** Employees may select only one option (Buy-Back or MPPP) for each accrual period.

Once the buy-back or MPPP Incentive election is made for any accrual period it may not be changed. Employees will receive the buy-back checks or MPPP credit no later than December 1 following the end of the accrual period.

Unused sick leave hours for which an election to buy-back or transfer into the MPPP is not made shall be carried over to the next year, subject to maximum accumulation limits, and will no longer be available for any future Annual Buy-Back/MPPP incentive election.

**C. One Time Election To Convert Sick Leave Accrued Prior To October 19, 2009 To PERS Creditable Sick Leave**

During the month of October 2009, employees will be given a one-time opportunity to convert unused sick leave that has been accrued prior to October 19, 2009 to PERS-credit-eligible sick leave (described in paragraph B(1) above). This election shall be irrevocable, and will include all of the employee's unused sick leave, including banked sick leave pursuant to D(1), and/or unbanked sick leave pursuant to D(3) below. If an employee makes this election, such accrued leave will no longer be eligible for pay-out at termination/retirement (previously banked leave) or at retirement (unbanked leave). All leave converted pursuant to this paragraph C will be subject to CalPERS rules for service credit eligibility. Leave converted under this paragraph will thereafter be considered, for purposes of disposition at the end of employment only, to have been accrued on or after October 19, 2009.

**D. Sick Leave Accrued Prior To October 19, 2009**

Sick leave accrued prior to October 19, 2009, which is not converted to PERS creditable sick leave pursuant to paragraph C above, shall be preserved in accounts separate from sick leave accrued on or after October 19, 2009, and shall be used pursuant to the terms of this paragraph D, including subsections (1) – (3).

**1. Banked Sick Leave (Under Previously Exercised Option)**

This section refers to sick leave which has been 'banked' in accordance with Labor Agreement Section 9.1B(2) as it was in effect on June 30, 2009, or banked pursuant to Agreements previously in effect. It excludes sick leave electively converted to PERS-creditable sick leave pursuant to paragraph C above. It includes sick leave for which a banking election was made during the 2008 or earlier option periods.

Banked sick leave, as defined above, will be preserved in a separate account for use by the employee in accordance with the provisions of former Section 9.1B(2), including the following:

- a. Such bank shall be set aside for payment upon death/retirement/termination and shall not be included in the calculation of unused sick leave pursuant to paragraph B(1) above or Government Code Section 20965.

- b. Sick leave hours banked will be paid at the employee's base rate of pay, effective on the employee's date of death or retirement/termination from District's employment.
- c. Employees who experience an illness/injury and exhaust their existing sick leave that is available, may utilize sick leave that has been banked under prior Section 9.1b(2) provided they make a written request to do so through their Department Manager at the time of the illness/injury and the circumstances qualify for sick leave under section F ("sick leave payment") below.

## 2. Sick Leave Buy-Back (Under Previously Exercised Option)

Employees who exercised the option during the September 2008 option period specified in Labor Agreement Section 9.1B(3) in effect on June 30, 2009 to make an irrevocable election to buy-back or deposit into the MPPP the value of sick leave earned during the annual accrual period, less sick leave taken during the annual accrual period shall receive the buy-back payments and the MPPP deposits required by the prior Labor Agreement.

Buy back checks for the 2009 accrual period under former Labor Agreement Section 9.1B will be distributed to employees no later than December 1 following the end of the accrual period, and MPPP elections for that period will be deposited by that same date.

## 3. Retirement Buy-Back

Sick leave accrued prior to October 19, 2009, and not (1) banked pursuant to paragraph 1 above; (2) bought back or deposited in the MPPP pursuant to paragraph 2 above; (3) converted to PERS creditable sick leave pursuant to paragraph C above; or (4) used pursuant to E and F below, shall be available for use as a Retirement Buy Back incentive. Employees leaving District service on a service retirement shall be paid fifty percent (50%) of this accrued sick leave balance upon the effective date of service retirement. This accrued sick leave shall not be included in the calculation of unused sick leave pursuant to paragraph B above or Government Code Section 20965.

## E. Order Of Use Of Sick Leave From Separate Accounts

When using sick leave with pay pursuant to Section F below, employees' sick leave balances will be deducted in the following order:

1. Sick leave accrued on or after October 19, 2009, if any, including any sick leave accrued before October 19, 2009 which an employee has elected to convert to PERS creditable sick leave pursuant to paragraph C above, if any.
2. If the accruals described in paragraph E(1) are exhausted, unbanked sick leave accrued prior to October 19, 2009, if any.
3. If the accruals described in paragraphs E(1) and E(2) above are exhausted, banked sick leave, if any, may be used subject to the terms of paragraph D(1)(c) above.

**F. Sick Leave Payment:** Employees shall receive sick leave with pay up to the amount of sick leave accrued at the time of illness, provided the requirements of this section are met. Employees shall accrue sick leave credits during the probationary period, however, they shall not be eligible for sick leave pay until after completion of the probation period.

An employee who is absent from work for reasons that qualify for use of sick leave under Section 9.1 who has no accumulated sick leave to cover such absence must use accumulated vacation, personal holiday, and compensatory time off before unpaid leave may be granted. Even though such charges are made, the employee's absence remains subject to the contract provisions governing the use of sick leave. The employee must advise the employee's appropriate absence report recipient, as designated by the District, of the category of paid leave that shall be charged for such absence. If the employee does not do so, the absence shall be charged by default against the employee's accumulated vacation, holiday and compensatory time off in that order. Sick leave preserved under section 9.1.F last paragraph (below) will not be available for such charges. Holidays may not be charged if such charge would reduce the number of holidays in the employee's account below the number of designated contractual holidays remaining in the fiscal year.

Employees shall be eligible for paid sick leave as follows, without limitation on their rights under state and federal law.

1. Illness, including the appropriate use of required prescribed medication which would impair the employee's work performance, injury, quarantine, or similar exposure to contagious disease;

2. Verifiable medical and/or dental appointments which cannot be scheduled outside the normal working hours, provided that a minimum of forty-eight (48) hours advance notice is given and provided subsequent confirmation that the appointment was kept is given if requested by Management.
3. Doctor's visits associated with pregnancy, subject to the provisions in "2." above;
4. Hospitalization or serious illness/accident and resulting subsequent related scheduled doctor's visits, subject to the provisions in "2." above;
5. Required attendance upon a seriously ill spouse, eligible domestic partner, or child. The District may require a written statement from the attending physician that the employee's attendance was required.
6. Required transportation to doctor for employee's spouse, eligible domestic partner, or child if spouse, eligible domestic partner, or child has serious accident or serious illness (subsequent verified and scheduled doctor's visits resulting from initial visit are also included).
7. Industrial injury and resulting subsequent related scheduled doctor's visits.

Sick leave with pay shall apply to each separate sick leave incident. For purposes of this section, "sick leave with pay" means pay calculated at the straight time day shift rate for the number of hours the employee was regularly scheduled to work each day, had the illness or injury not occurred.

If an employee's absence which qualifies for paid sick leave also qualifies as statutory family and medical leave (i.e. FMLA/CFRA), the employee may elect to preserve eligibility for participation in the annual buy-back or transfer into the MPPP of eligible accruals, if elected during the election period, by requesting to substitute vacation, floating holidays (for increments of a full day only), or compensatory leave pay, if applicable, or, if he/she has no accrued vacation, floating holidays or compensatory leave, requesting to take the leave unpaid. The request must be made before receipt of sick pay.

**G. Sick Leave Verification:** The District may take reasonable means to verify the employee's eligibility for sick leave. Upon prior written notice, an employee, at his or her expense may be required to provide a doctor's statement which demonstrates to the satisfaction of the District, eligibility for sick leave as defined above, for any sick leave incident.

Employees shall furnish a doctor's statement for each sick leave incident involving absences of more than three (3) working days

In instances where the District requires a doctor's statement, either to verify sick leave or determine an employee's fitness to return to work, that statement must include the following:

1. date and time of treatment;
2. duration of illness;
3. date cleared to return to work.

Otherwise, an employee returning to work from a sick leave incident must submit a required doctor's statement and other documentation within seven (7) calendar days of his/ her return to work. Failure to submit required documentation within the time provided shall result in denial of sick leave pay, and may result in disciplinary action.

The District may require any employee to submit to a medical examination by a doctor designated by the District, at the District's expense, as a condition of return to work from a sick leave incident or to verify the continuing need for sick leave.

Pattern use, misuse or abuse of sick leave will be governed by the District's disciplinary procedures and handled on a case-by-case basis.

**H. Sick Leave Reporting:** It is the responsibility of every employee absent from work because of illness or injury to report such absences to his/her immediate supervisor or the supervisor's designated representative. This report must include information as to the expected date of return to work and where the employee can be reached during his/her normal work hours. The employee will promptly notify his/her supervisor or supervisor's designee of any change which affects his/her ability to return to work.

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## 9.2 INDUSTRIAL INJURY / ILLNESS

A. **Industrial Injury/Illness:** Until December 31, 1988, an employee experiencing a verified industrial injury or illness will be entitled to receive no more than two (2) industrial accident leaves. Effective January 1, 1989, an employee experiencing a verified industrial injury or illness will be entitled to receive industrial accident leave compensation for no more than two (2) industrial accidents/illnesses during any twelve (12) month period. The employee will be compensated up to a maximum of three (3) days pay for each industrial accident leave. When an employee receives an industrial accident leave he/she shall be entitled to receive only one (1) additional industrial accident leave of up to a maximum of three (3) days during the next twelve (12) months. The twelve (12) month period shall commence on the date the employee returns to work from the absence which gave rise to the first industrial accident leave.

For the purposes of this Section, industrial accident leave shall commence only if the employee is not released to return to work by the beginning of his/her regularly scheduled shift next following the date on which the industrial accident/illness occurred.

Industrial accident leave compensation shall be advanced to an employee, within the limits set forth above, promptly upon proper notification to the District by the employee, on the condition that it must be verified at a later date. In order to be entitled to industrial accident leave, the employee should report the illness/injury to his/her immediate supervisor by the end of the shift in which the illness/injury occurred, but in no event no later than twenty-four (24) hours from the end of the shift in which the illness/injury occurred.

If it is later determined that the industrial accident leave was improper or invalid, the District may recover the amount equal to the industrial accident leave advance by deducting the amount advanced from the employee's existing or future sick leave, vacation or floating holiday accrual.

The employee shall be given five (5) working days to authorize such payment by payroll deduction or by designating the specific leave from which the recovery may be made. The accrual must be presently sufficient to cover the amount of the industrial accident leave advance. If the employee does not notify the District within five (5) working days, the District may deduct from any accrual an amount sufficient to cover the amount of the advance.

Nothing in this section shall affect the District's right to recover any amounts owed to it through appropriate legal action.

- B. **Coordination of Benefits:** Industrial accident leave and Sick Leave benefits, to the extent they are available, may be coordinated, at the employee's option, with Workers' Compensation or other compensation to maintain the employee's basic straight time earnings. Should an employee choose not to exercise the option of coordinating benefits, notification to the District is required in advance. No change in options will be made during an employee's disability status until BAP Phase I is implemented, after which employees may change options.

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### 9.3 MEDICAL EXAMINATIONS \*

Any medical examinations, including periodic eye tests, required of employees by the District shall be paid for by the District, with the exception of costs incurred as a result of untimely employee cancellation of or missed examinations or appointments which shall be paid by the employee, provided the employee is given one week notice of the appointment.

In the case of any job-related illness or injury, an employee shall have the right to examination/treatment by a doctor of his/her choosing.

Medical examinations or follow-up medical appointments shall be scheduled, where possible, during non-work hours. Should this not be possible, the examination shall be scheduled at either the beginning or end of the shift so as to minimize time lost from work.

#### JOB RELATED ILLNESS/INJURY

Should the employee select his/her doctor, and the District disagrees with any findings, the District may require a second medical opinion through a District-designated doctor.

Should the findings of the District-designated doctor be inconsistent with the employee-selected doctor, a doctor shall be mutually selected by the following procedure:

The District and the Union shall mutually agree upon an odd-numbered panel of doctors for such purpose. If they are unable to agree upon the names to be included on such a panel, they shall

request the Industrial Accident Commission to submit the names of independent medical examiners most frequently used in the San Francisco Bay Area in the various specialties of medicine and these shall constitute the panel. The District and the Union shall select a third doctor from this panel within five (5) working days of the date the dispute is established. The conclusions of the third doctor shall be final and binding upon the parties, and the fee shall be shared 50-50 by both parties.

No employee shall suffer any loss of income or other benefits as a result of any directive to report to a physician, and the time required to report and return from such examination shall be considered as time worked unless the employee is found physically unfit to return to work.

If the findings of the District-designated and employee-selected doctors are inconsistent, no employee shall suffer loss of income or benefits during the first thirty (30) calendar days after the second doctor's inconsistent conclusions are issued or until the conclusions of the third doctor are issued, whichever occurs first.

Should the third doctor uphold the findings of the District-designated doctor, the employee shall agree in writing to reimburse the District for any income or benefits received to which he/she was not entitled. Reimbursement to the District shall be completed within thirty (30) calendar days from the employee's return to work.

#### **NON JOB-RELATED ILLNESS/INJURY**

Should the District require any medical examination of an employee with a non-job-related illness/injury, the District may designate a doctor for such purpose. This doctor may be the employee's doctor; however, if the employee's doctor is selected, the District reserves the right to require a second medical opinion through another District-designated doctor.

If the first medical examination is not performed by the employee's doctor, and if the employee disagrees with any medical findings of the District-designated doctor, said employee shall have the right to examination doctor of his/her choosing.

In either case, should the findings of the two doctors be inconsistent, a third doctor shall be mutually selected by the following procedure:

The District and the Union shall mutually agree upon an odd-numbered panel of doctors for such purpose. If they are unable to agree upon the names to be included on such a panel, they shall request the Industrial Accident Commission to submit the names of independent medical examiners most frequently used in the San Francisco Bay Area in the various specialties of medicine and these shall constitute the panel. The District and the Union shall select a third doctor from this panel within five (5) working days of the date the dispute is established. The conclusions of the third doctor shall be final and binding upon the parties, and the fee shall be shared 50-50 by both parties.

No employee shall suffer any loss of income or other benefits as a result of any directive to report to a physician, and the time required to report and return from such examination shall be considered as time worked unless the employee is found physically unfit to return to work.

If the findings of the District-designated and employee-selected doctors are inconsistent, no employee shall suffer loss of income or benefits during the first thirty (30) calendar days after the second doctor's inconsistent conclusions are issued or until the conclusions of the third doctor are issued, whichever occurs first.

Should the third doctor uphold the findings of the District-designated doctor, the employee shall agree in writing to reimburse the District for any income or benefits received to which he/she was not entitled. Reimbursement to the District shall be completed within thirty (30) calendar days from the employee's return to work.

#### **\* Minute Clarification**

The parties agree Paragraph 2 is not intended to exempt employees from notice requirements of California State Law.

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## **9.4 DEFINITIONS**

A. **Incident:** A sick absence, regardless of duration.

B. **Service Retirement:** Separation from District employment, including application and eligibility for service retirement with PERS.

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## 9.5 TEMPORARY MODIFIED ASSIGNMENT PROCEDURE

The parties recognize that offering Temporary Modified Work Assignments (TMA's) can, when properly administered, benefit the District and employees financially and in accelerating rehabilitation. Temporary modified work or temporary work assignments will be provided to permanently (who volunteer to participate) and temporarily disabled BART employees, when in the judgment of the District, work is available which can be provided without adversely affecting operations or services. Temporary modified work will be considered on a case-by-case basis.

Each employee who desires a TMA shall submit a written notice of such desire simultaneously to his or her immediate supervisor and the District's Disability Programs Office, Department of Human Resources. Promptly after receipt of such notice, the Disability Program Office shall provide the employee with a Return-to-Work questionnaire for completion by the employee's physician, an instruction sheet on how to complete these forms, and a copy of section 9.5 of the Labor Agreement. The employee must simultaneously return this form completed to the Disability Program Office and the employee's immediate supervisor. Temporary modified work may involve modification of an employee's own job or assignment to work outside of an employee's current position or bargaining unit, as provided herein. The Disability Programs Office, in consultation with the applicable department, will determine eligibility for participation in the temporary modified work program and will coordinate temporary work positions /assignments.

To aid in the administration of this program, the (SEIU and ATU) shall appoint two persons from their bargaining unit to serve on a TMA committee. The duties of the committee include (a) identifying potential TMA opportunities not otherwise identified by the District and recommending them to the Senior Personnel Analyst of the Disability Programs Office for consideration, (b) evaluating proposed TMA assignments and (c) advising the Senior Personnel Analyst of the Disability Programs Office on potential improvements in program administration. The Senior Personnel Analyst of the Disability Programs Office shall periodically train new committee members concerning the

TMA program, and shall periodically offer such training to union officers, stewards, supervisors, and managers.

The Senior Personnel Analyst of the Disability Programs Office shall provide committee members with a quarterly report of all requests for TMA application materials, completed Return to Work questionnaires, and TMA's that have been implemented. In addition, the committee shall have access to the completed Return-to-Work questionnaires as they are submitted. The Senior Personnel Analyst of the Disability Programs Office may propose a TMA that crosses bargaining unit lines or that is intra-unit but not on the list described in 9.5.C.3. The committee may by unanimous vote approve assignments that cross bargaining unit lines. The representatives of the Union affected by a proposed intra-unit TMA not on the list may unanimously approve such assignment. If the Senior Personnel Analyst of the Disability Programs Office, the union presidents and Labor Relations Manager agree in writing, additional TMA's may be added to or removed from the list set forth in section 9.5.C.3.

On written notice delivered to the others within 150 and 180 days before the expiration date of this agreement, (either SEIU, ATU, or the District) may terminate further use or consideration of inter-bargaining unit TMA's and such use or consideration as occurs during the life of this agreement shall not be deemed precedent setting. The parties further agree that the relaxation of jurisdictional boundaries or rights permitted under this section is experimental in nature, restricted exclusively to this section, and may not be relied on as a precedent in any future dealings between them or any other bargaining unit.

**A. Medical Evaluation:** The Benefits Analyst will review all requests for temporary modified work. The Benefits Analyst may, after obtaining all necessary authorizations to release medical information, review the employee's medical records, confer with the employee's doctor and/or schedule an examination with a District-selected doctor to determine what type of work accommodations are required. All proposed accommodations or temporary modified positions/ assignments will be reviewed by a District-accepted physician, which may be the employee's physician, if said physician is selected by the District for this purpose, to determine if the job requirements/ assignments are within the employee's physical and mental abilities. Any disputes will be handled in accordance with Section 9.3 of the Agreement.

**B. Accommodation Review:** The Benefits Analyst will discuss accommodation options with a Department representative to determine if accommodations can be made for the employee's disability on a limited term basis without adversely affecting operations or services.

Accommodations may include but are not limited to:

1. reduced work schedules at a minimum of twenty (20) hours per week. Schedules which will result in mid-shift interruptions will not be available;
2. reassignment of non-essential duties; and
3. alternate temporary work assignments.

**C. Alternate Temporary Modified Positions/Assignments:**

1. The Senior Personnel Analyst of the Disability Office will follow the sequence outlined below in determining whether alternate temporary modified work positions/assignments may be made:
  - a. consider returning the employee to work in his/her current position in a modified capacity;
  - b. when, in the District's judgment, this is not possible, consider an alternate temporary position/assignment in the employee's department (Alternate placement within the employee's department will not involve placement in a position represented by a different bargaining unit.);
  - c. thereafter, consider an alternate position/assignment outside the department (Placement outside the department will not involve placement in a position represented by a different bargaining unit.); and
  - d. consider an alternate non-represented position/assignment outside the bargaining unit. Employees placed in non-represented positions/assignments retain the contractual protections provided for in the CBA of their respective Unions.
2. If temporary modified work is not available within the employee's own department, the Senior Personnel Analyst of the Disability Office will determine if there are any unfilled temporary help requests which the employee may be able to fill.

3. A list of temporary modified positions/assignments in which employees who are temporarily disabled may be placed will be developed. Departments who have temporary modified positions/assignments with which they need assistance may submit work requests to the Benefits Office.
4. If there are no temporary help requests available which the employee is qualified to fill, the Benefits Office will determine if there are any assignments on the modified assignment list which the employee is medically qualified to perform.
5. If a temporary modified position/assignment is available, for which the employee meets the minimum qualifications, the Benefits Analyst will confer with the appropriate department regarding placing the disabled employee in the temporary modified position/assignment.
6. If the Department Head or designee agrees with the recommendation, the employee and the Union will be so notified.
7. If the hiring department for the potential position/assignment believes the disabled employee is not qualified, for any reason, to perform the duties of the temporary modified position/assignment, the employee will remain off work. The Senior Personnel Analyst of the Disability Programs Office will, after consultation with the District's Office of Civil Rights, review the matter with the Department Manager of Human Resources whose decision will be binding on the hiring department except as provided in (h) below.
8. The hiring department may, within three days following notice of the Department Manager of Human Resources' decision, appeal the decision to the Deputy General Manager, whose decision will be final and binding.

**D. General Requirements:**

1. If an assignment is identified which, in the judgment of the District, is within the employee's medical limitations and restrictions, the employee shall return to work. The District may change regular days off and work hours while an employee is in the temporary modified assignment program. However, employees shall have the option to decline any initial or subsequent temporary modified position/assignment which is a change from the employee's last regular bidded shift, RDO or

location. If an employee declines a temporary modified position/assignment because it is a change from the employee's last regular bidded shift, RDO or location, the District and the employee shall meet to determine if an alternate position/assignment is available subject to the employee's rights set forth above.

2. Employees in temporary modified positions/assignments shall schedule medical appointments, when possible, during non-work hours. Should this not be possible, the examination shall be scheduled at either the beginning or end of the shift so as to minimize lost time from work. If the employee is working a reduced number of hours per week, all medical appointments must be scheduled during non-work hours.
3. After sixty (60) days in a temporary modified work assignment, eligibility for continuation in the assignment will be reviewed by the Benefits Office and a department representative. If the employee is not expected to return to regular work within thirty (30) days, the employee may be removed from the temporary modified work assignment or reassigned to another temporary modified work assignment. The Union will receive notification and explanation of such a removal or reassignment.
4. An employee may be transferred from one temporary modified work assignment to another if his/her functional limitations change or he/she completes an assignment subject to the employee's rights set forth in D.1. The Union will receive notification and explanation of such a transfer.
5. Pay will be at the employee's regular rate of pay. No assignments or combination of assignments will result in an employee earning less than he/she was eligible for while on disability. Any employee placed in a temporary modified assignment/position shall be in a paid status.
6. The District may require an independent medical evaluation by a District-selected physician to determine the current medical status of an employee on temporary modified work. Any disputes will be handled in accordance with Section 9.3 of the Agreement.
7. Temporary modified work will only be provided where, in the judgment of the District, it is available and where it may be accommodated without adverse consequences to the department or disruption in services or operations.

8. The District may terminate a temporary modified work assignment at any time, particularly if it begins to affect operations, services, or the productivity of other employees.
9. Vacancies shall first be filled in accordance with the other applicable sections of this Agreement prior to the use of the Temporary Modified Assignment Program.
10. Should a provision in this program be in conflict with applicable law (e.g., the Americans with Disabilities Act, the Rehabilitation Act of 1973, the California Fair Employment and Housing Act, etc.), applicable law will prevail.
11. For the purposes of this Program, "department" shall be defined as designated in the BART organizational charts, (i.e., Rolling Stocks & Shops, Power & Way, etc.) and as may be changed with future reorganizations.
12. For the purposes of this Program, assignment within any of the following enumerated groupings shall not be considered a change in location:
  - a. Records Center, Interstate Bank Building, TransPacific Center, Lake Merritt Administration Building, Metro Center, Madison Square Building, 4<sup>th</sup> Street Training Building, Cash Handling Building, Lake Merritt Administration Building; Oakland Shop, Oakland Shop Annex;
  - b. Concord Shop, Concord Transportation Building, Concord Yard, and all locations between Concord Shop and Bay Point;
  - c. Daly City Shop, Daly City Transportation Building, Daly City Yard; all work locations on the SFX extension;
  - d. Hayward Shop, Hayward Transportation Building, Hayward Training Center, Hayward Test Track, Hayward Yard, all locations between Hayward Shop and Dublin;
  - e. Richmond Shop, Richmond Transportation Building, Richmond Yard.

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## 9.6 STRESS MANAGEMENT

In recognition of the particular psychological demands on frontline employees, the District will develop and provide a stress management

program tailored to their unique circumstances.

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## **10.0 INTERPRETATION**

Should a provision contained in the General Provision of this Agreement be in conflict with a provision contained in Supplemental Provisions, the provisions of the Supplemental Provisions shall prevail.

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## **11.0 HEALTH & SAFETY**

### **11.1 SAFETY \***

The District will furnish safe, sanitary and healthful working conditions and facilities.

The District will furnish adequate devices to ensure health, safety and sanitation within the requirements of existing laws or regulations applicable to the District. The District and all of its employees shall observe the letter and spirit of all applicable safety standards within federal, state, and CPUC provisions for both employees and patrons.

Should sufficient evidence exist that any law or regulation is not being complied with, such evidence must be submitted to the District.

All matters arising out of this Section shall be handled expeditiously by all parties to effect the correction of any valid safety or health hazard.

Each employee shall be responsible for the proper care and maintenance of his/her tools, equipment and work area. Required tools and equipment and protective garments necessary to safeguard the health of or to prevent injury to a worker shall be provided by the District. The District shall ensure that a dolly to assist with moving heavy objects and a lightweight fire extinguisher are readily available and, if requested, shall provide other reasonable assistive devices required to accommodate employees.

No employee shall be expected to work in the presence of a valid safety or health hazard which he/she can demonstrate to the District as being an imminent threat to his/her health or safety. Should any employee believe that such conditions exist, he/she should so notify his/her immediate supervisor and a Safety Engineer shall be contacted to determine the degree of the existing hazard.

The District agrees to provide physical examinations and other appropriate tests including audiometric examinations on an annual basis for those employees whose work environment can be detrimental to his/her health or the safety of patrons.

**\* Minute Clarification**

The parties agree that "demonstration" of a safety hazard in Article 11.0 is accomplished through a reasonable showing by means of explaining, displaying, and pointing out that a valid safety hazard exists.

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**11.2 JOINT/UNION MANAGEMENT SAFETY AND HEALTH COMMITTEE \***

Three (3) representatives selected by the District and three (3) employee representatives selected from the Union Safety and Health Committee shall constitute a Joint Union/Management Safety and Health Committee.

Appointed representatives from the District and representatives from the Union shall meet on a monthly basis on a regularly scheduled day to be mutually agreed upon. The Committee shall designate an Accommodation Sub-Committee, the members of which shall include the Manager of Human Resources, EAP Manager, representative of the Office of the General Counsel, and up to three representatives of each Union, who may or may not also serve on the Health and Safety Committee.

The purpose of these meetings is to recommend and promptly address health and safety regulations, guidelines, training programs and necessary corrective action concerning conditions associated with the work environment. The Accommodation Sub-Committee shall specifically address issues related to employee injuries, injury prevention and potential accommodations. Specifically, the sub-committee shall identify ergonomic hazards in the workplace and develop strategies to minimize or avoid repetitive strain injuries.

Union representative of the Joint Union/Management Safety and Health Committee shall investigate and inspect on a periodic basis, without loss of wages, employee safety and health complaints which have not been corrected by the responsible supervisor. Such investigation and inspection shall be made in conjunction with the Safety Engineer appointed as the District's representative to the Joint Union/Management Safety and Health Committee.

The findings of this investigative team shall be presented to the Joint Union/Management Safety and Health Committee for appropriate action.

The District shall provide a secretary to record and prepare minutes of each monthly Joint Union/Management Safety Committee meeting.

**\* Minute Clarification**

Both parties agree that guests and advisors shall be permitted to participate in Committee functions upon advance notice. Said guests/advisors shall not be a voting part of the Committee.

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### **11.3 FIRST AID FACILITIES**

Prompt ambulance service and first aid to injured employees shall be provided on all shifts. A first aid facility room will be maintained at Hayward, Concord, Richmond, Oakland Shops and Daly City.

Adequate first aid equipment shall be furnished and maintained in all work areas as designated by the Joint Union/Management Safety Committee or the Safety Department.

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### **11.4 BREAK & REST FACILITIES**

Present break and rest facilities for use by employees shall continue to be maintained. District and Union shall jointly review areas where said facilities do not presently exist, and shall make every effort to provide same where space is available in stations and other work locations.

Where amenities such as tables, chairs, appliances, etc., are not furnished, the District and Union shall select such by mutual agreement and share equally the cost of providing same.

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### **11.5 PHYSICAL AND WEIGHT LIFTING REQUIREMENTS**

Where applicable, physical requirements for essential duties of positions shall be clearly established and set forth in the job description for each bargaining unit position. Minimum qualifications for positions shall include physical requirements only to the extent that such requirements are essential functions/duties of the position. All employees must be able to perform all essential job functions, with or without

accommodation, at the time they bid for that position. Lifting devices and other mechanical or other aids will be provided by the District upon request as needed to the extent that such devices and aids are found to prevent injury and/or reasonably accommodate District employees in performing their work.

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## 12.0 FURNISHED EQUIPMENT

### 12.1 TOOLS

A. Each District employee required to use tools as part of their regular work assignment shall be issued a District-owned set of tools and tool box. Tools will be of the assortment and quality necessary to perform all phases of the assigned work. The District shall provide each employee with a required tool list for the employee's job classification. New employees or employees entering a classification or new section shall be provided a set of tools and a tool box as itemized on the tool list within five (5) working days following assignment to the classification or section.

B. The District will conduct a periodic tool check to ensure that all tool kits are complete in the proper amount, quality and type of tools as indicated on the appropriate tool list. Employees whose previously issued tools are missing shall replace all missing tools at their own expense within thirty (30) calendar days of the tool check.

On District time, each employee will permanently "mark" each of his/her issued tools/tool kit to ensure positive identification of ownership with District provided marking equipment.

C. The District will replace, in kind, broken and unserviceable worn tools for personal tool kits providing the broken or worn tools are properly identified, required by the appropriate tool list, or previously approved tools added to the list by the District and returned to the District. No monetary allowance will be given for these replacements. Replacements of lost or missing tools is the responsibility of the District unless employee negligence is demonstrated.

Semi-annually, tools and tool kits will be subject to inventory and inspection to ensure the required tools are on hand and adequately maintained. Employees shall maintain the proper amount, quality, and type of tools required and have them available for work. Employees shall have fifteen (15) calendar days in which to bring their tools up to issue level.

- D. Special tools and equipment not on the employee required tool list will be issued from the Stock Room or Tool Room on a custody receipt and must be returned to the Stock/Tool Room when the specific task for which those items were issued has been completed. If special tools/equipment are lost or damaged, the employee issued those items shall be held responsible, provided the employee's negligence is determined by the District to have caused the damage or loss.
  - E. Issued tools, special tools and equipment are the property of the District and shall not be removed from District property without the express consent of the appropriate supervisor. Terminating and/or transferring employees shall be required to turn in all special tools and equipment previously issued and, if the tools/equipment are not turned in, will be charged for the replacement cost of those missing; provided employee negligence is demonstrated by the District; however, the primary objective will be to have the employee involved arrange for actual replacement.
  - F. District furnished power tools, electrical meters, and expensive equipment maintained as personal issue will be repaired at District expense. If employee negligence is determined by the District, causing need for repair or replacement, employee will be held responsible.
  - G. No employee shall be required to share their issued tools.
- 

## 12.2 UNIFORMS \*

During the life of this Agreement, the District will not handle uniform maintenance. The following uniform allowances will apply for those classifications as specified by the District:

- A. Five (5) items of uniforms will be available to be worn by maintenance employees. While on duty, one or more of the following items of apparel must be worn at all times:
  - 1. Coveralls
  - 2. Shirt/slack combination
  - 3. Bib overalls
  - 4. Waist-length jacket
  - 5. Shop coat (full length)

All items listed above must conform as to color, style, material, etc. to District specifications, with the Union to be consulted in development

of specifications. It is hoped several Bay Area suppliers will be able to supply proper uniforms as needed.

- B. All uniforms by specification must have the employee's name on front of apparel and BART insignia may be required.
- C. Each maintenance employee, specified by the District, shall be supplied by the District at the District's expense any combination of five (5) items indicated in Paragraph "A" above. Cleaning, repair, and replacement of uniforms thereafter will be the responsibility of the employee.
- D. Washing or cleaning of uniforms on District facilities shall not be allowed. Storing of soiled uniforms in personal lockers is to be discouraged and avoided due to hygienic and fire hazards. Employees are expected to keep uniforms in repair and clean.
- E. Clerical employees not now receiving uniforms will not be eligible for uniform or maintenance allowance. However, if duties of any clerical employee involve handling of dirty materials or servicing of copying machines which may cause frequent soiling of clothing, an allowance of one (1) frock (up to a value of twenty-five [\$25.00] dollars) per contract year can be allowed during the life of the Agreement on an individual basis. No maintenance allowance shall be paid to Clerical employees.
- F. A maintenance allowance of fifty dollars (\$50) semi-annually shall be paid on January 1 and July 1 of each year. This semi-annual maintenance allowance shall increase twenty-five dollars (\$25) effective July 1, 2007 and by another twenty-five dollars (\$25) effective July 1, 2008. This allowance shall be included in the employee's paycheck for the first pay period following January 1 and July 1 of each year. Said allowance shall be for the purchase and/or maintenance of uniforms. Employees hired on October 1 through December 31 and April 1 through June 30 of each Agreement year will be eligible to receive one (1) pair of safety shoes, but will not be eligible for the allowance until the first January or July allowance date after six (6) months of employment in an eligible classification.

**\* Minute Clarification**

The Union Chairperson and employees in a disability status of more than three (3) months during a respective uniform allowance period shall not be eligible for said uniform allowance.

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### 12.3 SAFETY SHOES

Safety shoes shall be worn by employees required by the District during their on-duty hours. The District will reimburse one hundred twenty-five (\$125) dollars annually to each employee required to wear safety shoes.

The safety shoes shall be the best suited to the employee's work environment and meet OSHA requirements.

Annual payment for the purchase and maintenance of safety shoes will be made in the month of September of each fiscal year.

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### 12.4 SAFETY GLASSES

#### Prescription Safety Glasses

- A. Those employees whose work requires eye protection and presently wear prescription glasses will be furnished prescription safety glasses.
- B. Those employees who presently wear prescription glasses will be required to take an eye examination and utilize whatever medical coverage they have that includes this provision. If the employee's medical coverage does not include eye examinations, the District will provide; however, this does not include "first time" eye examination.
- C. Safety prescription glasses provided under this program shall not be altered without District approval.
- D. Prescription or plano safety glasses shall be worn at all times in the following areas of work:
  - 1. maintenance pits
  - 2. blowdown pits
  - 3. machine shops
  - 4. carpenter shops
  - 5. during welding, soldering, chipping, grinding, polishing, and buffing.
- E. The District will pay for the glasses and employee may select whatever style he/she wishes provided the glasses comply with prescription safety glasses specifications (American National Standards, Z87.1-1989). Only District authorized optical vendors shall be patronized. The District will provide an updated price list to the Union as soon as it is made available to the District.

- F. Prescription safety glasses furnished under this Section will become the property of the employee and a condition of employment is the requirement to wear them while on the job.
  - G. An employee will be allowed no more than one-half (½) hours at straight time rate of pay off the job for the purpose of purchasing the specified furnished equipment as stated above.
  - H. Plano safety glasses will be properly fitted and provided by the District.
  - I. The District will provide the Union with a list of vendors within close proximity of all District facilities.
- 

## **12.5 PAYROLL DEDUCTIONS**

Employees shall be authorized to purchase safety shoes/glasses, tools and uniforms through authorized vendors using payroll deduction in accordance with prescribed procedures.

The District will post lists of authorized vendors on bulletin boards.

Effective when BAP Phase I goes live, the District agrees to permit employees to authorize the deduction from their paycheck of Committee on Political Education ("COPE") contributions.

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## **13.0 WORK DAY & WORK WEEK**

### **13.1 5-8 WORK DAY & WORK WEEK \***

The District established workweek shall begin at 0001 hours Monday and end at 2400 hours Sunday.

A workweek which has been assigned to an employee will be that employee's scheduled work week. The five (5) work days in that work week will be the employee's scheduled work days and the two (2) days off will be the scheduled days off. No premium shall be paid for Saturday and/or Sunday if such days are part of the scheduled workweek. All hours worked on the first or second off-duty day shall be compensated at the overtime rate set forth herein; provided that the employee has worked forty (40) straight-time hours during the regularly scheduled workweek.

An employee shall be assigned a work week which shall consist of five (5) consecutive shifts of eight (8) consecutive hours of work within a seven (7) day period and two (2) consecutive days off (forty-eight [48] hours). An employee's work week starts at the beginning of the shift of the first scheduled day following two (2) consecutive days off of his/her assigned work week.

A work day shall consist of eight (8) consecutive hours of work with a scheduled starting time. Paid rest and lunch breaks provided herein shall be considered as hours worked. Unpaid lunch breaks shall extend the consecutive hours of work by that amount of time of the break.

The designation of an employee's assigned shift shall be determined in accordance with Shift Differential.

There can be a maximum of three (3) shifts within a calendar day. Graveyard shift, Day shift and Swing shift.

- A. Graveyard shift shall be defined as the first (1st) shift of a calendar day.
- B. Day shift shall be defined as the second (2nd) shift of a calendar day.
- C. Swing shift shall be defined as the third (3rd) shift of a calendar day.

Clericals, Staff Assistants, Engineering Aides and similar positions customarily working a five (5) day week Monday through Friday with an unpaid lunch period, prior to the execution of this Agreement, shall continue to do so for the life of this Agreement unless changed by mutual agreement.

Whenever any employee bids a shift, he/she shall not thereafter be assigned to another shift until at least ten (10) hours have elapsed since the end of the previous work assignment.

Subject to other provisions of this Agreement governing choice of shifts, notice of changes in shift assignment shall be given as far in advance as practicable.

Following a Track Department re-bid, the District will implement a Transition Staffing Plan commencing September 1, 2009. During the duration of the Transition Staffing Plan, the District will assign two (2) Foreworker positions and fourteen (14) other positions (Classifications to be determined by the District) to a graveyard shift with Saturday and Sunday RDOs (majority of the shift). Once the bid is completed, the two (2) Foreworkers and fourteen (14) other

positions will be identified and be eligible to remain on this shift for their remaining time in the department. The remaining four (4) foreworkers and twenty (20) other positions will have Monday and Tuesday RDOs (majority of the shift). Any attrition that occurs to these prospective sixteen (16) positions will be backfilled to any shift at the discretion of the District. Any new hires will be assigned according to District's discretion.

The District will abolish five (5) Capital Grounds Department positions in this department during September 2009. Once the personnel who occupy these positions exercise their seniority, those who do not maintain their MW II pay grade be red-circled.

**\* Minute Clarification**

In the event that voluntary overtime will cause less than ten (10) hours of elapsed time prior to an employee's normal work assignment, then an eight (8) hour turnaround will be applicable.

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**13.2 4-10 WORK DAY & WORK WEEK \***

The District may establish an alternate work week in areas to be identified consisting of four (4) days per week and ten (10) hours per day (4-10 Plan). Employees working under this Plan shall be governed by the following conditions:

- A. Vacation and Sick Leave shall be accrued and used based upon a "ten (10) hour work day" and not an "eight (8) hour work day".
- B. Holidays as provided for under this Agreement shall be accrued and paid on the basis of a "ten (10) hour work day" and not an "eight (8) hour work day".
- C. The work days and work week for employees in this Plan shall be as follows:
  - 1. A work day shall consist of ten (10) consecutive hours of work, with a scheduled starting time. (Paid rest and lunch breaks provided herein shall be considered as hours worked.)
  - 2. The assigned work week shall consist of four (4) work days within a seven (7) consecutive day period, with a minimum of two (2) consecutive days off.

- D. An employee shall be assigned a work week which shall consist of four (4) shifts of ten (10) consecutive hours of work within a seven (7) day period and at least two (2) consecutive days off (forty-eight [48] hours). An employee's work week starts at the beginning of the shift of the first scheduled day following two (2) consecutive days off of his/her assigned work week.
- E. The designation of an employee's assigned shift shall be determined in accordance with Section 14.2 - Shift Differential.
  - 1. Employees who receive Graveyard shift differential for their assigned shift shall be working on the Graveyard shift.
  - 2. Employees who do not receive a shift differential for their assigned shift shall be working on the Day shift.
  - 3. Employees who receive Swing shift differential for their assigned shift shall be working on the Swing shift.
- F. Payment for the shift assigned will be subject to those hours designated for Graveyard, Day or Swing shift, whichever is applicable.
- G. The staffing of shifts and the weekly distribution of the work force shall be determined by Management.
- H. The provisions of this Section shall prevail whenever they conflict with any other provisions of this Agreement for employees working under this Plan, except as provided in Section 19.1.
- I. No employee work unit not currently working on the 4-10 Plan as of the effective date of this Agreement shall be required to work the 4-10 Plan without the concurrence of the parties.
- J. As a specific result of implementation of this Section, there shall be no reduction in the number of employees and special pay premiums stated in Section 14.6 shall apply. The District otherwise maintains the right to reduce that workforce as conditions necessitate.

\* See SEIU/MOU-007-4

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### 13.3 MEAL PERIODS - MAINTENANCE \*

At the District's discretion, a thirty (30) minute paid meal period, from one (1) hour before to one (1) hour after the midpoint of the shift shall

be granted all employees providing such employees remain at their work locations.

**\* Minute Clarification**

It is understood that in some situations, i.e., Wayside during the graveyard shift, that it may be impracticable due to the short duration of non-revenue service to grant the meal period one (1) hour before to one (1) hour after the midpoint of the shift. At the District's discretion, the meal period will be provided at a convenient time for the work to be accomplished.

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**13.4 MEAL PERIODS - CLERICAL**

Clerical employees, Engineering Aides and Staff Assistants may request their choice of either:

- A. a forty-five (45) minute unpaid meal period, or
- B. a thirty (30) minute paid meal period.

The District shall adhere to said request unless section scheduling cannot allow. During the months of January and July of each year, clerical employees shall be given an opportunity to select one of the above options. The option chosen shall be subject to section scheduling by the District. In such cases within a section where paid meal periods are not possible on a regular basis, such periods may be scheduled on a voluntary rotation basis. Once an option has been approved, no further changes shall be made until the next "option selection month."

The thirty (30) minute paid meal period from one (1) hour before to one (1) hour after the midpoint of the shift shall be granted to any clerical employee, provided the employee remains at his/her work location, and receives and processes messages.

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**13.5 BREAK PERIODS**

A fifteen (15) minute paid break period shall be provided midway in the first and last half of the shift, or breaks may be taken on an irregular basis as determined by the District.

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### 13.6 SHIFT EXCHANGE \*

Employees may request to trade shifts and RDOs provided that:

- A. No additional compensation, shift premiums, or other cost to the District results from such assignment.
- B. Exchanging employees are determined by the District to be fully qualified to perform the required tasks of both assignments.
- C. Employees may only exchange with another employee working the same number of hours per shift.
- D. Requests for exchanges must be submitted in writing no later than five (5) days prior to the start of the requested shift exchange.
- E. All requests for exchanges must be approved by the District.
- F. No exchange will result in overtime pay for either employee.
- G. No exchange will result in pay for hours not worked.

#### \*Minute Clarification

TVM's and TVET's must exchange shifts/RDOs within their cost center.

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### 14.0 PREMIUM PAY

#### 14.1 OVERTIME

- A. Time worked in excess of forty (40) hours in a scheduled work week or eight (8) hours in a scheduled workday shall be compensated at one and one-half (1-½) times the existing straight time rate of pay for all actual overtime worked.
- B. All hours worked on the employee's regular days off (RDO) shall be compensated as follows:
  - 1. All hours worked on the first scheduled day off (RDO) shall be compensated at one and one-half (1-½) times the existing straight time rate.
  - 2. All hours worked on the second regular day off (RDO) after working the first regular day off (RDO), shall be compensated at two (2) times the existing straight time rate.

- C. When a shift change is made as a result of an employee voluntarily bidding for such a change, no premium (overtime) compensation shall be paid unless otherwise required by law. When a shift change occurs as a result of an employee being inversely assigned to another shift, the overtime premium shall be payable to that employee.
- D. No individual employee shall be expected to work a continuous sixteen (16) hours in a shift changeover, nor shall an employee be paid for less than forty (40) hours in any work week around a shift changeover.
- E. Overtime worked, including work in excess of the regular workday or an employee's regular days off, except in the case of an emergency or Section 16.4, shall be on a voluntary basis and shall be rotated equally among employees who normally perform said functions during the regular schedule. Emergency, for the purposes of this Section, shall be defined as any condition which has caused, or could cause, injury to persons, or damage to property and/or equipment, major modifications affecting either revenue vehicles or District wayside (right-of-way), power failures, derailments, fires, and natural disasters. In the interest of a cooperative effort toward the continued improvement of reliability of the services provided the public, the Union shall exert every effort to ensure that an adequate number of employees are available to work any overtime indicated necessary by the District. Union officials in each department or division shall work with supervisory personnel to meet the objectives expressed herein.
- F. The District shall maintain an Overtime Exception List. All bargaining unit employees shall be given the opportunity between December 1 of each year through December 31, to express their unwillingness to work any non-emergency overtime by signing an Overtime Exception List to be effective January 1 through December 31, of the following year.

All employees not signing the Overtime Exception List shall be required to work non-emergency overtime in inverse seniority order whenever there are insufficient employees available from volunteer employees not appearing on the Overtime Exception List.

An employee who signed the Overtime Exception List may subsequently choose to remove his/her name from said list. However, once his/her name is withdrawn from the list, it may not be returned to the Overtime Exception List until the effective date of the next overtime exception sign-up. Employees not signing the Overtime

Exception List during the sign-up period may not add their names to the list during the effective period of the respective Overtime Exception sign-up.

- G. As much advance notice as possible shall be given on all overtime.
- H. The steward, in conjunction with the District shall maintain and post any overtime and holiday overtime lists.
- I. Employees refusing overtime shall be credited with the highest hours worked for said refusal and shall be marked in red on the overtime list.
- J. Employees entering classification/new section shall be credited with highest hour accrual within the job classification in their section.
- K. Where two (2) overtime rates are applicable to the same work period, only the higher shall be paid.
- L. A six dollar (\$6) meal allowance shall be paid to employees who have worked more than twelve (12) continuous hours.

#### **14.2 SHIFT DIFFERENTIAL \***

Where fifty percent (50%) or more of an employee's shift occurs between the hours of 4:00 p.m. and 12 midnight, a swing shift premium of seven percent (7%) will be paid for all hours worked during the shift at the existing straight time rate of pay.

Where fifty percent (50%) or more of an employee's shift occurs between midnight and 8:00 a.m., a graveyard shift premium of nine and one-half percent (9-½%) will be paid for all hours worked during the shift at the existing straight time rate of pay.

An employee's shift shall be determined in accordance with applicable Shift Differential language in the labor Agreement and the following:

0001 - 0800	- Graveyard Shift
0800 - 1600	- Day Shift
1600 - 2400	- Swing Shift

If fifty percent (50%) or more of an employee's shift is worked between the hours of 0001 - 0800 the employee is working on Graveyard Shift, which is the 1st shift of the calendar day. If fifty percent (50%) or more of the employee's shift is worked between the hours of 0800 - 1600 the

employee is working on Day Shift, which is the 2nd shift of the calendar day. If fifty percent (50%) or more of the employee's shift is worked between the hours of 1600- 2400, the employee working on Swing Shift which is the 3rd shift of the calendar day.

Whatever shift the employee is working, he/she shall be compensated in accordance with the applicable rate of pay for that shift including shift differential if applicable.

Any and all hours worked outside an employee's scheduled work shift hours shall be compensated at the applicable rate of pay for all hours worked during the designated hours of each designated shift.

#### **\* Minute Clarification**

In the event that the employees normally assigned shift extends into the next shift due to manpower requirements or overtime needs they shall be paid the shift differential of the shift they are working, or their own shift, whichever is higher.

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### **14.3 STAND-BY PAY**

Employees required by District assignment to remain on stand-by duty, subject to call-in, shall be paid a minimum of one-half (½) of a day's pay per day during the employee's assigned work week and a full day's pay per day on off-duty days unless such employee is called and released from such stand-by assignment by the District prior to the beginning of stand-by duty. All stand-by pay shall be paid at the existing straight time rate of pay.

Employees who are called in while on stand-by shall receive stand-by compensation for only those actual hours they were on stand-by.

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### **14.4 UNSCHEDULED CALL-BACK \***

In the event an employee is called back for unscheduled work outside of his/her regular work day or work week, compensation will be based on a minimum of one-half (½) day's pay per day at the applicable rate of pay. This Section shall be limited to a specific assignment where broken time is involved. In no event shall an employee be eligible for both stand-by and call-back compensation for the same hours.

### \* Minute Clarification

The understanding of the parties signing off this Section is that the change to existing language which provides that "a minimum of one-half (½) day's pay per day" shall be paid is inserted to accommodate the five-day and four-day work week. If there is no on-shift steward or on-shift foreworker at that location, the District is not precluded from assigning unscheduled call-back using the appropriate department/section overtime procedure.

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#### 14.5 LEADWORKER

An employee assigned, in the absence of supervision, as leadworker to lead other bargaining unit employees shall be paid leadworker premium of seventy-five cents (75¢) per hour additional to his/her applicable rate of pay for such time so assigned.

**Lead Assembler:** A leadworker position of Lead Assembler with the appropriate premium shall be implemented whenever three (3) or more Assemblers are working on a shift. This Lead Assembler shall be required to have at least three (3) years assembly experience, with leadership potential.

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#### 14.6 SPECIAL PAY PREMIUMS

A premium rate shall be paid employees performing special work as defined herein. Employees assigned shall receive a premium rate of forty cents (40¢) per hour above their regular straight time rate of pay for work so assigned. This premium shall increase by \$0.35 per hour to a total of seventy-five cents (\$0.75) per hour effective July 1, 2007. This payment shall be applicable only when employees perform special work which shall include:

- A. Maintenance work performed in sewer sumps, and sewers, and sewer pumps (less motors);
- B. Operating vehicles of a two rear axle class or higher;
- C. When employees are required to hold toxic certification licenses for OSHA LD50 ratings #1 and #2 relating to herbicides and pesticides only;

- D. Any work, including pole climbing but excluding window washing, which shall subject the employee to a fall of more than forty-five (45) feet;
  - E. Working a bilingual shift (Phone Center);
  - F. Exterior car cleaners.
- 

#### **14.7 TEMPORARY INSTRUCTOR**

Whenever an employee is assigned to formally instruct another employee, he/she shall receive one dollar (\$1.00) per hour additional to his/her applicable rate of pay for such time so assigned.

Whenever an employee in a foreworker classification or clerical is assigned or directed to conduct orientation or classroom instruction or to prepare instructional material as his/her primary assignment for any part of a day, he/she shall receive one dollar (\$1.00) per hour additional to his/her applicable rate of pay for such time so assigned. These provisions shall not be applicable to incidental instruction by foreworkers or the clerical classification in the course of an assignment, if such instruction is not specifically his/her primary assignment during any such hour.

To be eligible for instructor pay, an employee must be assigned by the District to specifically instruct or train an employee on a specific job.

When an employee is assigned to work with another employee on a day-to-day basis, or in cases of familiarization, orientation (including OJT) no instructor pay is due.

Temporary instructors for Maintenance and Clerical Subunit training shall be selected from among the classification being trained, whenever practical, to accommodate special training needs. Temporary instructors shall be paid at the applicable instructor premium while assigned to training.

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#### **14.8 COMPENSATORY TIME OFF**

The District shall compensate overtime hours worked in one of the following ways upon advance approval by the Department Manager and consistent with operations scheduling requirements of the individual departments concerned:

- A. **Compensatory Time:** Time off in lieu of overtime payment. Compensatory time accruals will be limited to forty (40) hours worked for an equivalent of sixty (60) hours of compensatory time per fiscal year.
- B. **Overtime Payment:** Overtime payment to be paid in accordance with Section 14.0 of the Agreement.

An employee must elect to receive either overtime payment or compensatory time for overtime hours worked during the pay period in which the hours are worked.

With a minimum of five (5) working days notice, an employee may elect to use accrued compensatory time which may be scheduled according to department scheduling at no additional cost to the District. Requests to utilize such compensatory time off shall be subject to Departmental approval and scheduling. For all classifications except Clerical Subunit (Clerical, Staff Assistants, Engineering Aides), the District shall allow an employee to use compensatory time in either 8 hour or 10 hour increments. Clerical Subunit (Clerical, Staff Assistants, Engineering aides) may take compensatory time off in less than eight (8) hour increments and shall be limited to two (2) consecutive shifts.

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## 14.9 SPECIAL POSITION ASSIGNMENT

Stores: Six (6) Senior Storekeepers shall be maintained in the Stores department at Oakland, Hayward, Richmond, Concord Shop, Daly City, and at Wayside (one at each location).

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## 15.0 VACATION

### 15.1 SENIORITY & SELECTION: VACATION\*

For purposes of vacation leave, District date-of-hire seniority shall prevail. Vacation shall be scheduled the year round. Employees shall be notified by January 15 of the amount of vacation that they have as of December 31 of the previous year. The District shall post vacation schedules by January 15. Vacation selection, in order of seniority, will take place between February 1 and February 28. In each round, an employee, when requested, will bid either verbally or in writing. Each employee will make his/her selection or lose a turn in the pick cycle. At the end of each round, results will be posted for twenty-four (24) hours

before additional rounds take place. Vacation schedules shall be set and the final results will be posted by March 15. After February 28, employees may take unscheduled vacation that is available on a first come, first served basis as long as said vacation does not conflict with the vacation schedule. Any slots which were not bid during the annual vacation selection process will be granted, when requested, on a first come, first serve basis.

- A. Only one (1) vacation leave up to full accrual can be picked in the first go-round. After all employees in the functional classification have made their initial selection, date-of-hire seniority will again prevail for the subsequent selections.
- B. Vacation cancellation shall require five (5) working days notice.

**\* Minute Clarification**

The parties agree that once a vacation schedule has been posted for bid, the District shall not change the above posted vacation schedule.

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## **15.2 CANCELLATION DUE TO ILLNESS**

Should an employee or a member of his or her immediate family as defined in section 9.1 become ill while the employee is on vacation, the employee may, at his/her option, notify the District to change their pay status from vacation leave to sick leave, subject to the following conditions:

- A. The employee shall present medical verification of the illness to the District upon his/her return to work.
  - B. The sick leave used shall not extend the employee's scheduled vacation. Vacation which is not used due to illness may be rebid or taken as incremental vacation leave subject to department/section scheduling.
  - C. Vacation charges will not be changed to sick leave charges under this section until the employee complies with the provisions of 15.2.A.
-

## 16.0 HOLIDAYS

### 16.1 NUMBER OF HOLIDAYS \*

The District shall observe thirteen (13) contractual holidays per year as follows:

New Year's Day (January 1)  
Martin Luther King's Birthday (third Monday in January)  
Washington's Birthday (third Monday in February)  
Memorial Day (last Monday in May)  
Independence Day (July 4)  
Labor Day (1st Monday in September)  
Veteran's Day (in conjunction with national observance)  
Thanksgiving Day (fourth Thursday in November)  
Christmas Day (December 25)  
Employee's Birthday  
Floating Holidays (Maintenance Subunit - 3)  
(Clerical Subunit - 2)  
Friday after Thanksgiving (Clerical Subunit only)

#### \* Minute Clarification

When employees request to schedule a floating holiday on Easter Sunday, Chinese New Year, or Cinco de Mayo, the District will grant each holiday in accordance with department/section scheduling on a first-come, first-serve basis.

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### 16.2 EMPLOYEE'S BIRTHDAY \*

No employee shall be required to work on his/her birthday. Birthday holidays shall be observed only on the employee's birthday. However, with a minimum of five (5) working days notice, an employee may elect to convert his/her birthday holiday to a floating holiday which may be scheduled according to department/section scheduling at no additional cost to the District. Should an employee's birthday fall on his/her day off, he/she shall, at his/her option, receive an extra shift's pay at his/her existing straight time rate for that pay period, or an extra shift off with pay at the employee's existing straight time rate to be taken consistent with department/section scheduling.

In any year other than a leap year, February 28 shall be considered the birthday holiday for any employee whose birthday is February 29.

In the event an employee's birthday coincides with a contractual holiday, the employee shall, at his/her option, receive an extra shift's pay at the employee's existing straight time rate of pay during the pay period, or an extra shift off with pay at the existing straight time rate, to be taken consistent with department/section scheduling.

**\* Minute Clarification**

The parties agree that if an employee does not elect to float his/her birthday holiday pursuant to this Section, the employee shall not be allowed to work on his/her birthday.

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### **16.3 HOLIDAY PAY**

In order to be eligible for holiday compensation, an employee must be in a paid status. Definition of unpaid status is as follows: (1) authorized leave of absence; (2) disability insurance after thirty-one (31) continuous days; (3) suspension of more than fifteen (15) days; (4) industrial disability insurance after twenty-six (26) continuous weeks.

In no event shall any employee be permitted to carry over any holiday from one contractual year to the next contractual year.

Should any holiday fall on an employee's day off at his/her option, shall receive an extra shift's pay at the employee's existing straight time rate during that pay period, or an extra shift off with pay at the existing straight time rate to be taken consistent with department/section scheduling.

Should a contractual holiday occur during an employee's recognized vacation, the employee shall, at his/her option, receive an extra shift of compensation at the employee's existing straight time rate for that pay period, or an extra shift off with pay at the existing rate to be taken consistent with department/section scheduling.

Effective when BAP Phase I goes live, an employee may elect to have the post-tax cash equivalent value of unused floating holidays under section 16.1 (not previously banked) or carryover holidays (shifts received off in lieu of pay for working on a holiday under section 16.2 or 16.3) deposited in his or her MPPP account, subject to applicable legal limitations and the terms of the MPPP plan.

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## 16.4 HOLIDAY OVERTIME

Whenever an authorized District manager directs a unit member to work on a holiday, the District shall compensate the unit member at the overtime rate of one and one-half times the regular base hourly rate of pay for the unit member's classification. In the event that no unit members volunteer to work on a holiday and the District must assign mandatory overtime on a holiday, the District shall assign the least senior qualified employee on the seniority roster until work assignments are covered.

- A. Employees working on a holiday and who are normally scheduled to work that day, will receive one and one-half (1-½) times their regular rate of pay in addition to straight time holiday pay or they may float the holiday in accordance with departmental/section scheduling. Employees normally scheduled to work on recognized holidays shall be expected to work on such holidays unless released by Management.
- B. All hours worked in excess of regularly scheduled work day on a holiday shall be compensated at two (2) times the employee's regular straight time rate of pay, in addition to straight time holiday pay with holiday pay not to exceed eight (8) hours.
- C. When requested by Management, employees on their regular days off who volunteer to work on a holiday shall be compensated at two (2) times their regular straight time rate of pay, in addition to straight time holiday pay with holiday pay not to exceed eight (8) hours.
- D. Overtime worked on a holiday outside the regular work schedule shall be on a voluntary basis and shall be rotated equally among those employees who normally perform said functions during the regular schedule.

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## 16.5 HOLIDAY SCHEDULING

Should work be required on a recognized holiday and a sufficient workforce as determined by Management be unavailable voluntarily, assignments shall be made by selecting the most junior qualified employee on the seniority roster until work assignments are covered.

The floating holidays for employees will be granted consistent with the scheduling ability of the employee's department or section. Employees must give five (5) working days notice of intent to take a floating holiday.

Failure of an employee to give such notice may be cause for refusal of such floating holiday request.

After February 28, when the annual vacation bid has been resolved, holidays will be granted for open vacation dates on a first-come, first-serve basis when requested in accordance with this section.

Clerical subunit employees assigned to work locations in the Lakeside Building, Lake Merritt Administration Building, Metro Center, or Alice Street Building will observe Saturday Holidays on Friday and Sunday Holidays on Monday only if their regularly scheduled work week includes Friday and Monday.

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## **17.0 TRAINING**

### **17.1 GENERAL PROVISIONS**

- A. The Union and the District agree the District will provide training for employees which will result in a competent staff and provide a means of upward mobility for all employees. (Employees, as determined by the District, will be given necessary training to enable them to perform assigned tasks).
- B. A program shall be continued to assure that new employees receive orientation and familiarization training within ninety (90) days of initial employment with the District. In addition, ongoing orientation and familiarization training will be provided to keep employees abreast of new developments and important changes in District operating rules and regulations, etc.
- C. A program will be developed to improve and enhance employees' upgrade and promotional opportunities for those employees seeking a more satisfying and meaningful occupation within the District. Employees will also be encouraged to enroll in supplemental training programs under the Educational Assistance Program to further augment District-provided training under this Section.
- D. On prior approval by the Training Division, the District will pay the full cost for all courses, seminars, and workshops completed by the employees.
- E. The District will assign employees to attend training classes providing a sufficient number of volunteers are unavailable subject to departmental or section scheduling.

### \* Minute Clarification

The parties agree that the purpose of the New Hire Orientation Program is to acquaint employees with the terms and conditions of employment and the Union organization/structure and its history. As such, the material presented during the four (4) hours allotted to the Union shall be confined to such matters. The parties agree to meet quarterly to discuss and evaluate the New Hire Orientation Program.

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### 17.2 JOINT TRAINING COMMITTEE \*

The District agrees to the formation of a Joint Training Committee, four (4) members to be selected by the Union and four (4) members to be selected by the District. The Committee in conjunction with the Training Division will develop, review, and make recommendations regarding training programs before implementation. Training programs recommended by the Training Committee shall be considered and implemented to the extent possible within operational/fiscal constraints.

Union members of the Joint Training Committee, upon prior notice to their immediate supervisor, shall be granted reasonable time off with pay for attendance at Union/Management meetings, seminars, workshops, classes, etc., related to carrying out their function as members of the Joint Training Committee.

The Training Committee will be provided with up-to-date information concerning past, present and future training and further reasonable additional information requested by the Committee.

### \* Minute Clarification

The District will supply the services of a secretary to record, file and maintain any and all records of this Committee. The secretary will forward copies of all information and documentation to the Union.

The District will allow advisors/guests to participate in Committee functions. Said advisors/guests will not be voting participants of the Committee.

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### 17.3 INTERMEDIATE AND SENIOR CLERKS IN TRAINING \*

A. The District has established a Training Division in the Human Resources, Transportation, and Operations Administration and

Facilities Maintenance Departments. Bargaining unit positions in the Training Division shall include Intermediate and Senior Clerks.

These positions shall be filled on the basis of qualifications. Methods of testing and training selected bargaining unit employees for the Training staff shall be prescribed by the applicable Department Manager.

Employees selected for these positions shall maintain and continue to accrue classification seniority in that classification while assigned to the Training Division and shall retain the right to revert to their former classifications in the event of a reduction in force or disqualification.

- B. The reporting location for the Intermediate and Senior Clerks will normally be the actual Training facility where the training or work assignment occurs. The routine shift assignment will be 8:00 a.m. to 4:00 p.m. Monday through Friday with Saturday and Sunday as regular days off (RDO); however, reporting location, shift assignment and RDO may be changed as needed.
- C. The special provisions of this Section shall apply to only the above-referenced positions.

**\* Minute Clarification**

The District, in its discretion, shall continue to select Senior Clerks in the Training Division on the basis of qualifications. However, to the extent possible, they will be selected from within the Bargaining Unit.

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#### **17.4 EMPLOYEE DEVELOPMENT SPECIALISTS**

- A. The District has established a Training Division in Human Resources. Bargaining unit positions in the Training Division shall include Employee Development Specialists (EDS). The EDS rate shall be as shown in the base wage schedule.

The EDS shall be selected on the basis of qualifications. Methods of testing and training selected bargaining unit employees for the Training staff shall be prescribed by the Manager of Human Resources.

Reductions in force will be governed by Section 25.0 and reversions, by Section 26.2.

EDS may be assigned periodically to bargaining unit functions, but will not replace regularly assigned employees.

- B. The reporting location for EDS's will normally be the actual Training facility where the training or work assignment occurs. The routine shift assignment will be 8:00 a.m. to 4:00 p.m. Monday through Friday with Saturday and Sunday as regular days off (RDO); however, reporting location, shift assignment and RDO may be changed as needed.
- C. The special provisions of this Section shall apply to only the EDS.
- 

### **17.5 TRAINING SCHEDULING**

The District will assign employees to attend training classes, providing a sufficient number of volunteers are unavailable subject to departmental or section scheduling.

When Training classes are of a duration of one (1) week or more, the employee will have two (2) RDOs on the days immediately following that training week.

A training week for purpose of this Section shall consist of five (5) consecutive days.

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### **17.6 TRAINING, TRAVEL, AND SHIFT DIFFERENTIAL**

The District shall not compensate employees for travel for attending District-provided training programs within the District. However, the District will continue applicable shift differential during training courses.

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### **17.7 CHANGE DEVELOPMENT AND TRAINING OVERSIGHT COMMITTEE**

**A. Committee Duties:** The District and Union shall each appoint six (6) members to serve on the Change Development and Training Oversight Committee ("CDTOC"). The Committee shall meet not less than twice a month. Union members shall be released from regularly scheduled duty with pay to attend such meetings. The Committee shall operate by majority vote of those attending. The Committee shall:

1. Assess District-related training and succession needs for SEIU-represented job classifications, including but not limited to those related to change precipitated by new technology;
  2. Develop workforce succession plans for the training of District employees to fill anticipated vacancies in classifications that are difficult to fill with job-ready (i.e. with normal orientation) candidates through normal recruitment procedures.
  3. Determine the prioritization and timing of the expenditure for money in the CDTOC training fund described in subsection B below. Such funds shall be spent exclusively on training of employees as part of succession planning or retraining necessitated by displacement due to reorganization related to BAP I and II.
  4. Develop outside sources of funding for District training efforts.
  5. Explore the possibility of coordinating District training and training planning efforts with those of other non-District entities for the purpose of leveraging maximum value for the District of District training expenditures.
- B. CDTOC Training Fund:** The District shall provide forty thousand dollars (\$40,000) as seed money for a CDTOC training fund no later than July 1, 2006. Such fund shall also include funds identified pursuant to paragraph A.5 immediately. Money in the CDTOC training fund shall be used exclusively for training employees for succession and change related job transition or retraining purposes.
- C. Transitional Protection.**
1. An employee whose position is identified for elimination as a direct result of reorganization related to BAP Phase I or II shall not be laid off for one (1) year after the effective date of the position elimination. This requirement shall be waived if a bona fide emergency occurs during the one-year period. Such employees shall receive priority for training assistance pursuant to subsection A.4 above.
  2. For purposes of this subsection, a "bona fide emergency" includes a natural or human-made disaster or similar exigency that jeopardizes or has compromised the physical integrity of the BART system or the region it serves in such a manner as to give rise to a reasonable expectation that the District's revenues may be seriously impacted.

3. The District agrees that it will withdraw the layoff notices given to bargaining unit members due to adoption of the FY 06 budget (approximately 7 System Service Workers, 4 Utility Workers, 3 clerical employees and 2 staff assistants). These employees will not be laid off for at least one (1) year.

**D. Early Separation Incentives.** The District may offer early separation incentives to assist in reducing involuntary layoffs. The incentive may be targeted to a specific classification(s) and limited to the number of early separations desired by the District within that classification. The incentive shall consist of one (1) week's straight time base pay for each year of the voluntarily separating employee's District service up to a maximum of twenty (20) weeks for twenty (20) or more years.

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## **17.8 TRAINING EQUIPMENT AND MATERIAL**

The District and the Union agree that technicians must be trained to perform safety critical repairs and make adjustments to mainline equipment. If Mainline Equipment is not available for training purposes during revenue hours, at the District's sole discretion and when sufficient funding is available, the District shall include an option in BART procurement contracts for procuring hands-on training devices for new mainline equipment with new design and technology unfamiliar to BART technicians. The District's exercise of its discretion shall not be subject to the grievance procedure.

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## **17.9 TRAINING PROGRAMS**

### **I. Background**

In order to foster employee advancement and development and create opportunities for qualified employees to be promoted from within, the District may establish programs to train entry level employees to the intermediate and advanced levels.

### **II. DESCRIPTION**

#### **A. Training Program**

Qualified BART Professional Employee Development Specialists shall teach all classes on BART specific equipment, maintenance procedures and safety subjects. The training programs on general education subjects may consist of District, college, technical school,

commercial, union or other training resources at the discretion of the District.

The Union shall be provided an opportunity to read and comment on the program for each craft. The Union shall be provided copies of periodic reports regarding the status and progress of the overall training program.

## **B. Screening and Selection**

1. The screening and selection process will include standardized written testing and an interview panel evaluation by Management and one union representative. District administered testing will be performed by BART Professional Employee Development Specialists. Standardized testing will include reading comprehension (English), mathematical skills, and technical aptitude applicable to the target classification. Applicants will be evaluated and selected on the basis of the highest cumulative scores from the written tests and the interview panel, and must have a minimum combined score of 75%. Those receiving the highest scores will fill the available slots. Selection will not be based on seniority.
2. The District may solicit applications from external and internal candidates concurrently. The District will first review and consider applications from current BART employees. If the District determines that qualified applicants from within the District cannot fill all trainee positions, it reserves the right to fill some of these positions from outside the District.

## **C. Trainee Status And Terms**

### **1. Training Courses**

Trainees must pass all training courses, and failure to pass any single course shall constitute grounds for terminating their trainee status. When training is provided by external training resources, the determination of whether an employee passes or fails the training shall be made by the entity providing the training.

### **2. Academic Homework**

Trainees are required to perform academic homework assignments unpaid and on their own time.

### 3. Length of Program

The length of the training program will vary depending upon the complexity and content of the program, and the length of the training program will be defined prior to inception for each classification. Regardless of the length of the training program, employees participating in a training program shall be paid as described below.

### 4. Trainee Pay

1<sup>st</sup> year - Eighty percent (80%) of the entry level rate (Step 1) for their target classification

2<sup>nd</sup> year - Ninety percent (90%) of the entry level rate (Step 1) for their target classification

3<sup>rd</sup> year - The entry level rate (Step 1) for their target classification

4<sup>th</sup> year - The second level rate (Step 2) for their target classification

A District employee whose present salary is higher than the pay rates defined above for their applicable year in the program shall be "red circled". Said trainees shall be paid their existing salary and will not receive pay progression increases until they successfully complete the program or advance to a step in the program with pay higher than their "red circled" pay. Upon successful completion, "red circled" employees will receive pay at the step progression nearest to their pay; however, the pay shall not exceed the top step of the target classification and will not be retroactive.

### 5. Trainee Bidding Rights

Trainees shall have no seniority/bidding rights while in the training program, and shall work as assigned.

### 6. Trainee Leave

Vacation leave and floating holidays shall accrue, but trainees will not be permitted to take vacation, compensatory time off, or personal holiday leaves while in the training program, except as required by law, unless specifically approved in advance and in writing by Management. Trainees will be permitted to

observe contractual holidays, unless enrolled in external training programs that normally require attendance on that holiday.

#### 7. Probationary Period And Bidding Rights

Upon successful completion of the training program, trainees shall enter into a one hundred and twenty (120) calendar day probationary period and work as assigned. During the probationary period, trainees may participate in the Advance Bid Procedure. However, no changes in the trainee's shifts, reporting location, or RDOs shall occur until after successful completion of the one hundred and twenty (120) day probationary period. Upon successful completion of the probationary period, classification seniority shall begin and be retroactive to the initial date of entry into the target classification.

Trainees are prohibited from bidding on other District positions while participating in the training program.

#### 8. Trainee Commitment

Trainees must sign an agreement that, upon successful completion of the Training Program, they will continue to work for BART in the capacity in which they were trained for at least three (3) years, or reimburse the District on a pro-rata basis for training costs incurred, reimbursing the District its cost for any tuition, fees, books, supplies, or other lawfully recoverable costs that the District paid to facilitate such training, unless the employee can establish a bona fide hardship.

#### 9. Termination

Any trainee who was a District employee upon entry to the training program who is unsuccessful in completing the training program and/or the probationary period, as determined by the District, shall be terminated from the training program but retain rights to bump back to their formerly held positions.

Any trainee who was not a District employee upon entry into the training program who is unsuccessful in completing the training program and/or the probationary period, as determined by the District, shall be terminated from employment.

#### 10. Reduction In Work Force

In cases of reduction in force, no employee other than a fully qualified employee in the target classification may bump a trainee. If the District undertakes a reduction in force in the trainee classification, then Section 25 will govern.

#### 11. Trainee Priority

The District may fill vacancies within classifications either from those outside or from within the District. However, BART employees who have successfully completed the Training Program shall be granted priority over other candidates.

#### 12. Work Schedules

The District shall establish and may from time to time modify the Trainee's schedule of work and RDOs. During academic training, the Trainee's work schedule, including lunches and breaks, will be pursuant to the academic provider's class schedule independent of the terms of the CBA. However, an employee in the Training Program pursuant to C.6 above shall not be permitted to take vacation, compensatory time off, or personal holiday leaves, except as required by law. Such employees will be required to attend class on any contractual holiday on which the program holds training classes that the employee would normally attend, and will not be paid time and one half. Employee may choose to float the holiday or be paid and will not be paid time and a half.

#### 13. Instructor's Pay For BART Specific Training

On each shift worked in the field (not academic training) by a Trainee while he/she is in the Training Program, the District will select an EDS or OJI instructor at its sole discretion. The District will select, assign and pay one (1) or more experienced employee in a classification, as required by work assignments, to provide technical guidance and instruction to the Trainee, pursuant to Section 14.7 of the CBA (employee formal instruction). Such instructing employee shall receive such extra pay (\$1.00 per hour) for all hours worked providing formal instruction to the Trainee.

#### 14. Discipline And Termination

The District may at any time terminate from District employment any probationary Trainee as provided for Section 26.1 of the CBA.

#### TRAINING PROGRAM AGREEMENT

Agreement made this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ between the San Francisco Bay Area Rapid Transit District ("BART") a rapid transit district established pursuant to Public Utilities Code Section 28500 et. seq., and \_\_\_\_\_

In consideration for BART's acceptance of EMPLOYEE in the Training Program, EMPLOYEE agrees as follows:

Upon successful completion of the program, EMPLOYEE shall not voluntarily terminate EMPLOYEE's employment with BART in the capacity in which EMPLOYEE was trained for a period of three (3) years from the date of completion of the program.

In the event of a breach by the EMPLOYEE of the foregoing obligation, EMPLOYEE shall reimburse BART for the cost of training EMPLOYEE in the Training Program. EMPLOYEE shall pay BART the sum of \$400.00 per month for each month remaining between the date of EMPLOYEE's voluntary termination and the end of the three (3) year period referred to above.

Such reimbursement shall be calculated by multiplying the monthly sum set forth above by the months remaining. For the purposes of the Agreement, if EMPLOYEE voluntarily terminates his/her employment between the first and fifteenth of the month, that month shall be included in the reimbursement calculation. If EMPLOYEE voluntarily terminates his/her employment on or after the sixteenth of the month, that month shall be excluded from the reimbursement calculation.

BART and EMPLOYEE both agree that the amount established hereunder as liquidated damages is reasonable at the time of execution of this Agreement and that BART may seek to enforce this Agreement in any court of competent jurisdiction without first exhausting any administrative remedies which may be available to BART.

If any provision of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provision shall nevertheless continue in full force without being impaired or invalidated in any way.

Executed at Oakland, California on the day and year first above written.

BART

EMPLOYEE

By: \_\_\_\_\_

Human Resources  
Department Manager

By: \_\_\_\_\_

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**18.0 NON-DISCRIMINATION / AFFIRMATIVE ACTION**

**18.1 EQUAL OPPORTUNITY**

The intent of this Section is to continue efforts of equal employment opportunity for all persons and to establish methods for resolution of defined equal employment problems.

Further, the intent is designed to meet the spirit and letter of the Federal Civil Rights Law, Executive Orders and Amendments, and the State of California Fair Employment Practices Act.

Finally, the parties agree no employee covered by this Agreement shall suffer discrimination because of his/her membership and participation in the Union.

Should procedures negotiated relating to promotion and/or reduction in force produce results contrary to these objectives, the parties may, by mutual agreement, seek to achieve these objectives by ways and means outside the established seniority procedures.

There shall be no discrimination in the application of provisions of this Agreement in recognition of such, the parties are committed to ensure these provisions are applied equally to all employees without regard to race, color, religion, handicap, sex, sexual orientation, age or national origin and in a manner consistent with the stated Affirmative Action Policy of the District.

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**18.2 AFFIRMATIVE ACTION COMMITTEE**

The Union shall share equally with the District the responsibility for applying this Section by establishment of a joint Union- Management Committee, not to exceed four (4) committee members selected by the

Union and a like number selected by the District, with each Subunit to monitor affirmative action policies.

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## 19.0 SPECIAL PROVISIONS

### 19.1 STAFF ASSISTANTS, CLERICAL AND ENGINEERING AIDES \*

Staff Assistants, Clerical and Engineering Aides shall have the option of selecting one of the following alternate work schedules:

- A. Standard eight (8) hour, five (5) day work week.
- B. **Flextime** - The beginning and ending hours of the standard eight (8) hour, five (5) day work week may be selected to provide for an eight (8) hour work day with a thirty (30) minute or forty-five (45) minute unpaid lunch. Band-time hours within which the selection may be made are 0615 and 1900. On July 1 and January 1 of each contract year, the Staff Assistants, Clerical and Engineering Aides whose work week falls within the Flextime option may, at the District's discretion, reschedule their beginning and ending work hours.
- C. **4-10 Work Week** - A work day shall consist of ten (10) hours of work, with a scheduled starting time, a forty-five (45) minute unpaid lunch, and three (3) fifteen (15) minute paid break periods. The assigned work week shall consist of four (4) work days within a seven (7) consecutive day period, with a minimum of two (2) consecutive days off. Vacation and Sick Leave shall be accrued and used in accordance with Section 13.2. Holidays shall be accrued and paid in accordance with Section 13.2. Overtime shall be paid in accordance with Sections 13.2 and 14.1.
- D. **9/80 Work Schedule** - The 9/80 work schedule shall consist of eight (8) nine-hour days and one (1) eight-hour day. A work day shall consist of nine (9) consecutive hours of work (except on alternate weeks when one (1) work day shall consist of eight (8) consecutive hours of work) set between the hours of 0615 and 1900. A work period within this plan shall consist of a total of eighty (80) hours worked. As a general rule, employees will be required to take every other Friday off as part of the three days off portion of the schedule. The Friday the employee works shall be the eight-hour day. (Depending on departmental scheduling, an alternate compressed eight-hour day off may be assigned.) Arbitrary switching of the compressed day off will not be permitted except as approved by the

individual department on a case-by-case basis. If a holiday falls on a 9/80 employee's normal nine (9) hour workday, the holiday shall be paid at a nine (9) hour rate of pay. Holidays falling on an employee's RDO or eight (8) hour day shall be paid at an eight (8) hour rate of pay.

The 9/80 plan modifies an employee's workweek as defined by the Fair Labor Standards Act (FLSA). This change to the work week is not made to avoid the payment of overtime. The eight-hour day and the day off are the same day of the week, generally alternating Fridays. However this does not preclude the parties, by mutual agreement, from using other than Fridays for implementation of the program. The work week is divided midway through the eight-hour day and the day off.

Employees participating in the 9/80 Work Schedule shall be subject to departmental guidelines regarding the implementation of said schedule.

The District and/or participatory Department(s) may unilaterally terminate or suspend the 9/80 Work Schedule or an employee's participation in said schedule at any time for reasons such as an emergency or operational necessity as determined by the District, the employee's failure to comply with this section and/or Departmental guidelines, etc.

Such selection among all of the above alternatives must be consistent with operations scheduling requirements of individual departments concerned and approved by the department manager.

#### **\* Minute Clarification**

The parties agree that the various work week alternatives contained in this Section are options available to Staff Assistants, Clerical and Engineering Aides which may be pursued with their respective department supervisors/ manager. However, implementation of any of these optional work weeks are subject to the approval of the appropriate department manager.

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## **19.2 FOREWORKERS**

A. Foreworkers base wage rates shall reflect a differential of at least ten percent (10%) between said Foreworker and the highest classification supervised.

- B. Foreworkers shall be responsible for informal counseling and, as necessary, for administering the first step of the disciplinary procedure (verbal reprimand). Further, Foreworkers shall be responsible for informing their immediate supervisors of problems that may lead to further disciplinary action. These responsibilities shall be reflected in the job descriptions.
- C. When there is a temporary Foreworker vacancy, the District may fill the position through the use of Foreworker overtime or an upgrade of the senior, qualified employee who can perform the work on the given day, shift, and at location where the vacancy exists. If overtime is required in the next lower classification, overtime will first be offered to the Foreworkers at the location before an upgrade is offered. If a Foreworker call-in is required, the District will only upgrade until the Foreworker arrives. If unable to fill as stated above, then classification seniority will apply.
1. In the event the temporary vacancy extends beyond thirty (30) days, the procedure as described in Section 27.1 (Position Assignment) of the Agreement will apply.
  2. Foreworker duties will not be performed by non-bargaining unit employees.

Also, retain Side Letter 1-3 - System Foreworker Job Description.

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## **20.0 UNION REPRESENTATIVES**

### **20.1 UNION REPRESENTATIVES \***

A reasonable number of Union representatives employed and recognized by the District (to be identified within thirty [30] days of the effective date of this Agreement) shall assist employees in resolving grievances at the lowest possible administrative level. These employees shall be afforded reasonable time away from their normal duties for the conduct of Union business. Authorized Union business shall consist only of investigation and processing of grievances and meetings with the District, and may be conducted without loss of pay or benefits. Meetings with the District shall include instances where there is a District representative in attendance, and/or authorized by the District, e.g., grievance resolution meetings, discipline hearings, arbitration, contract recognized committee meetings, contract negotiations, and training/orientation sessions. In order for Union representatives to be paid while conducting Union business, it must be authorized and

conducted on District premises. Union representatives shall not be paid for Union business conducted away from District property except for the following:

**BART Chapter:**

1. Chapter President;
2. Two (2) Vice Presidents;
3. Contract negotiations;
4. A chief stewards meeting, four (4) hours per month per chief steward with five (5) days prior notice to the District;
5. Eight (8) hours preparation time for one (1) chief steward per scheduled arbitration;
6. Eight (8) hours preparation time per scheduled Adjustment Board for one (1) chief steward.

**BART Professional Chapter:**

1. Chapter President;
2. Chapter Vice President;
3. Contract negotiations.

Union representatives shall advise their immediate supervisor or his/her designee of their intent to engage in Union business as far in advance as possible. Such request for release time shall include the location, area of the activity, the estimated time needed and the specific nature of the Union business involved. In instances where operational needs prevent the supervisor from granting the specific request, the representative and the supervisor shall immediately pick an alternate, mutually agreed upon time for the future conduct of the requested Union business. Supervisors shall make a reasonable effort to grant authorized Union business as requested or as soon as operationally possible, when the original request cannot be granted. If the supervisor fails to immediately cooperate in the effort to pick an alternate, mutually agreed upon time, the representative shall be allowed release time as originally requested. Misuse of Union business by a Union representative shall subject the Union representative to disciplinary action and/or loss of pay consistent with the terms and conditions set forth in this Agreement. If the Union determines there to be an abuse by the District with respect to the loss of pay and/or the imposition of discipline in this context, the Union shall resort solely to the grievance procedure and seek such remedy as it believes to be appropriate. Self-help in this area will not be countenanced.

In the event of meetings or hearings concerning non-spontaneous matters not requiring immediate resolution, there will be twenty-four (24) hours notice to the immediate supervisor of those employees who are to attend such meetings or hearings. Those employees attending such meetings or hearings must be directly concerned with the subject of the meetings or hearings. In the event the number of employees required in attendance raise operational concerns, a schedule of staggered appearances shall be worked out between the parties.

Upon formal designation, Union representatives employed by the District will not be transferred from the assignment shift or location they hold at the time of their election or appointment unless mutually agreed. They will be given the privilege of using the District's inter-office mail, e-mail, and a telephone as may reasonably be necessary in the conducting of Union business. E-mail use is permissible by stewards for corresponding with District management or individual employees on pending union business if the steward has an assigned PC with e-mail access with no global e-mail use. The District may revoke assignment of any PC at any time. The District will explore the possibility of providing an electronic bulletin board on the District's intranet for posting of notices and information by the Union.

Each member of the duly elected or appointed Union Negotiation Committee attending Union-District meetings will be compensated by BART for actual time lost as a result of such meetings in increments of four (4) hours. Any other duly elected or appointed committee member performing approved Union-District related business will be compensated by BART for time lost required to accomplish the approved committee work.

BART employees selected by the Union as full-time officials shall have recall rights to their former positions at BART with seniority accruing during such leave. An employee on leave of absence under this Section shall have the option to pay into and continue in Health and Welfare programs. This provision shall be retroactive to January 1, 1971. PERS contributions would be continued to the extent provided by law.

#### **\* Minute Clarification**

The parties agree that the number of Union Stewards for the 2009-2013 Agreement is as follows:

**BART Chapter:**

- Three (3) full-time representatives (Chapter President and Two (2) Vice Presidents)
- Twenty-one (21) Chief Stewards
- Fifty-four (54) Area/Shift Stewards

**BART Professional Chapter:**

- One (1) full-time representative ( Chapter President)
- One (1) Chapter Vice President
- Three (3) Area Stewards

**\* Minute Clarification**

The parties agree that this proposal resolves all outstanding Union business disputes, including grievances.

**\* Minute Clarification**

The full release time for the BART Professional Chapter President is for the duration of this agreement. The parties understand that officers of the Professional Chapter will conduct union business in accordance with regular union business leave language provided above and will not have full-time paid release, except to the extent provided above for the professional Chapter President.

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**20.2 SUPER-SENIORITY**

Union Officers and Chief Stewards shall be afforded super-seniority as follows:

- A. Monday through Friday Day shift;
- B. Seniority on layoff in classification;
- C. In case of conflict, District date-of-hire will prevail;
- D. When no Saturday or Sunday regular days off or day shifts exist, the District shall be under no obligation to retain or create a position for an employee because of preferred seniority status for whom there is no work or who cannot perform available work in a qualified manner. In the event no Saturday/Sunday regular days off or day shifts exist, employees afforded super-seniority shall have bumping rights to the preferred shift.

- E. Chief Stewards elected from the off shifts, shall retain their differential for time worked.
  - F. During their respective terms of office, the President and two vice-presidents of the BART Chapter and the President and vice-president of the BART Professional Chapter shall receive relief differential in recognition of their variable work schedules, as reflected in current practice.
- 

## 21.0 GRIEVANCE PROCEDURE

### 21.1 DEFINITION

A Grievance shall be defined as any dispute which involves the interpretation or application of this Agreement, scope of representation, and such rules, regulations and resolutions presently in force or as may from time to time be adopted by the District.

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### 21.2 PROCEDURE \*

The parties recognize that disputes should be resolved expeditiously at the lowest possible administrative level, notwithstanding the right and desirability of the employee or the Union to bypass any initial steps if the case involves decision-making at a higher administrative level.

- A. **Step 1:** The employee and/or his/her representative may present the grievance personally, in writing or orally, to the immediate superior within ten (10) working days of the occurrence of the dispute or ten (10) working days from such time as the employee or Union could have been aware of the occurrence;
- B. **Step 2:** If the grievance is not resolved within five (5) working days of the presentation under Step 1, the grievance may be submitted in writing to the department head or his/her designee. Such submittal to the department head shall be within five (5) working days of the action by the immediate superior. The department head shall respond within five (5) working days;
- C. **Labor Relations & Union Meetings (Step 3):** If the grievance cannot be resolved under Step 2, the Union may, within five (5) working days of the action by the department head, arrange for the convening of a meeting between representatives of Labor Relations and the Union to attempt to resolve the grievance on a mutually acceptable basis.

D. **Arbitration (Step 4):** Should the matter remain unresolved in Step 3 above, either party may, within ten (10) working days of the determination, request arbitration of the dispute. Within ten (10) days after the request for arbitration, the parties shall strike for an arbitrator. Either party may thereafter contact the arbitrator to initiate the scheduling of a hearing date. The parties agree to exert all reasonable efforts to avoid undue delay in the scheduling process. In any arbitration forum, the decision of the Arbitrator shall be final and binding on all parties. Expenses of the arbitration and/or court reporter shall be borne equally by both parties unless, by prior agreement, the parties agree the losing party shall bear all such expenses.

1. **Informal Arbitration:** If the issue has not been submitted to formal arbitration, the grievance will be submitted to a permanent arbitrator who shall promptly convene a hearing under the informal arbitration procedure with the understanding that there may be multiple cases in a day.

Each party will present its case orally without benefit of legal counsel, or written briefs. Witnesses may be called by the parties, as required. The permanent arbitrator shall submit the decision and the basis for his or her decision in writing to the parties within ten (10) working days of the receipt of the hearing transcript.

A permanent arbitrator shall be selected by mutual agreement or from the Arbitration Strike Sheet containing the names of eleven (11) neutral arbitrators utilized and mutually agreed upon by the parties. The parties shall alternately strike names from the list until one (1) remains who shall then be the arbitrator. The term of the permanent arbitrator will be one (1) year from date of his or her appointment and shall continue to serve from year to year thereafter unless either party serves written notice upon the other no less than thirty (30) working days prior to the expiration of each annual term of its desire to select a new arbitrator.

In the event the permanent arbitrator is not available within thirty (30) working days from the date the moving party requests an informal arbitration, a relief arbitrator will be selected in a similar fashion as that for the permanent arbitrator identified above. The relief arbitrator will be selected on a case-by-case basis and will not have any ongoing term.

The permanent arbitrator shall have the authority to resolve any dispute or issue that is properly before him or her under this Agreement except matters that have been referred to Formal Arbitration.

Five (5) working days prior to the hearing, the respective advocates shall meet for the purpose of establishing a submission sheet. The submission sheet shall contain the following information:

1. The issue.
2. The remedy.
3. The agreed upon facts.
4. A tentative witness list.

If the parties cannot agree upon the issue and/or the remedy, then the arbitrator shall have the power to frame the issue and decide the remedy, in accordance with Section 21.2 D (4).

2. **Formal Arbitration:** Either party may refer an issue unresolved at Step 3 directly to formal arbitration. In arbitration, each party shall be represented by the advocate of their choosing. Written briefs shall be filed at the discretion of the arbitrator.

If the matter is referred to formal arbitration, an impartial arbitrator shall be selected from the Arbitration Strike Sheet containing the names of eleven (11) neutral arbitrators utilized and mutually agreed upon by the parties. The parties shall alternately strike names from the list until one (1) remains who shall then be the arbitrator. In the event the selected arbitrator is not available within sixty (60) working days, then the next arbitrator on the list in inverse order will be selected.

3. **Immediate Arbitration:** Either party may waive the time limits specified herein and proceed to immediate arbitration, either formal or informal, in any case where either party alleges the other is threatening to take an action in violation of this Agreement in so short a period of time as to disallow the other party from proceeding within said time limits. In any such case, the Arbitrator shall have full equitable powers to frame a decision, including an order to the party initiating the grievance to abide by the time limit provided in this Article, or a restraining order against the party threatening the action, or any other form of arbitration order that would resolve the matter in an equitable and just manner. In case of immediate arbitration, no briefs shall be filed by either party.

Immediate arbitration for this purpose shall be defined to mean the earliest arbitration date available after at least five (5) working days from the date of request to schedule/substitute is received by the respondent. Either party may substitute the subject grievance in lieu of the first arbitration, after the five (5) working day period, which is scheduled between the parties for another matter. Should the parties not decide to make such a substitution with the first available arbitration after the five (5) working day period, no other substitution is permitted, except by mutual agreement.

4. **Powers of the Arbitrator:** In any arbitration held pursuant to the Agreement (i.e., immediate, informal or formal), the person acting as arbitrator shall act in a judicial, not legislative manner. The arbitrator shall not amend, modify, nullify, ignore, add to or subtract from the provisions of the Agreement but, rather, shall interpret and apply its terms. The arbitrator shall consider and decide only the issue or issues agreed upon by the parties, including the issue of arbitrability. If the parties are unable to decide upon the issue or issues to be submitted to the arbitrator, the arbitrator shall decide what the issue or issues are, based upon the grievance that was filed. If the arbitrator sustains the grievance, he or she shall fashion an appropriate remedy that does not conflict with provisions contained in this Agreement.

**\* Minute Clarification**

Except by mutual agreement Union Stewards and District Managers shall be excluded from the meeting between representatives of Labor Relations and the Union at Step 3 of the Grievance Procedure.

**\* Minute Clarification**

The parties agree to meet, develop and implement a program designed to review, resolve, or terminate all outstanding grievances as of the signing date of the agreement, including the option to use state mediators, with a target date of June 30, 2003.

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### 21.3 WITNESSES

Parties who may have direct knowledge of circumstances relating to the grievance may be present at the request of either party during any stage of the procedure. In the case of employees, they shall be compensated at their regular rate of pay for actual time spent in such meetings.

## 21.4 TIME LIMITS

- A. **Grievance Processing:** The time between the steps of the procedure may be extended by mutual agreement. Failure by the employee or Union to follow the time limits, unless extended by mutual agreement, shall cause the grievance to be considered withdrawn; failure by the District to follow the time limits, unless extended by mutual agreement, shall cause the grievance to be deemed settled in favor of the employee.
- B. **Grievance Resolution Processing:** The District shall process grievance resolutions and arbitration awards to the Accounting Division within two (2) weeks of the date that the Human Resources Department and the Union agree to the grievance resolution, or within two (2) weeks from the date the Human Resources Department receives the arbitration award.

In cases where processing of the arbitration award or grievance resolution depends on information or materials to be supplied by the employee or Union, the time limits set forth above shall be suspended until the information or materials is supplied to the Human Resources Department.

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## 22.0 DISCIPLINE PROCEDURE

### 22.1 PRE-DISCIPLINARY HEARING REQUIRED

With discipline cases, no non-probationary employee may be suspended without pay or discharged for disciplinary reasons without a pre-disciplinary hearing before a hearing officer designated by the District.

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### 22.2 PRE-DISCIPLINARY HEARING

When required under section 22.1 above, a pre-disciplinary hearing before a hearing officer designated by the District shall be commenced within fifteen (15) calendar days or a mutually agreed upon date after the charging supervisor notifies the employee in writing that he or she is recommending disciplinary action against the employee.

The selection of the hearing officer by the District shall be from a panel which has previously been submitted to the Union for review.

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### 22.3 DEROGATORY MATERIAL

Derogatory material over eighteen (18) months old will not be admissible for disciplinary or grievance proceedings and may not be utilized in evaluating an individual for promotion.

No matter not in the official personnel file or referred to in the official personnel file shall be used as the basis of discipline.

For the purposes of this section, derogatory material is defined as:

- A. Memoranda/correspondence relating to employee discipline; or
  - B. Special memoranda/correspondence which reflects adversely on an employee's performance not submitted in connection with a standard performance evaluation form.
- 

### 22.4 JOB ABANDONMENT

- A. Except as provided in subsection B below, an employee who is absent from work without authorization for seven (7) or more work days shall be tentatively deemed to have abandoned his or her District employment. In that event, the District may implement the following procedure:
  - 1. The District will send a dated notice by certified mail (return receipt requested) to the employee's last home address on record with the District. Such notice shall indicate the District's intent to terminate the employee and the date, time, and location of the employee's pre-termination hearing. The District shall send a copy of the notice to the union at the same time.
  - 2. The hearing shall commence at the appointed time as per 1 above, but no sooner than seven (7) days after the notice is first delivered to the employee's address. If the employee does not appear at the hearing, the District may implement the termination.
  - 3. An employee who returns after the seven (7) day absence, but before the hearing in A.2, shall be allowed to return to work until the hearing process is completed.
  - 4. If the employee appears at the hearing, the Hearing Officer shall make his or her decision after hearing the employee's evidence.

5. If the District terminates the employee, the employee may within ten (10) working days grieve the termination directly to step 3 of the Grievance Procedure. However, the only issues before the arbitrator shall be whether the procedure set forth in this subsection A has been properly followed and whether the employee was absent without leave for reasons not reasonably within the employee's control. The District shall have the burden of proof on the former issue. The employee shall have the burden of proof on the latter issue.
- B. If an employee who is absent from work without authorization provides his or her supervisor with sufficient evidence to establish that the employee's unauthorized leave was due to reasons not reasonably within the employee's control, subsection A5 shall apply unless the supervisor reverses or withdraws the termination process.
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## **23.0 SENIORITY**

### **23.1 DISTRICT DATE-OF-HIRE**

District Date of Seniority is the date of initial full-time employment with the District. Employees entering/re-entering the bargaining unit after the signing of this Agreement shall have as their date-of-hire the date of their entry/ re-entry into the bargaining unit.

This Section shall not apply to employees covered under Article 26.3 (Employees Holding/Accepting Positions Outside the Bargaining Unit).

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### **23.2 CLASSIFICATION SENIORITY**

Classification seniority is the date of entry into a position within a given classification.

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### **23.3 COMMON SENIORITY DATE**

In the event of a common date-of-hire, seniority will be determined by lot in the presence of an uninvolved Union steward.

Common classification dates shall be decided by date-of-hire.

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## 23.4 SYSTEM-BIDDING SENIORITY

Bidding system-wide shall be by date-of-hire seniority.

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## 23.5 TERMINATION OF EMPLOYMENT

An employee's seniority rights and length of continuous service shall conclude upon termination of employment.

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## 24.0 BIDDING

### 24.1 CLERICAL SUBUNIT \*

A. Clerical Subunit vacancies shall be filled as follows:

1. First option to bid shall go to qualified employees within the classification, with District date-of-hire to govern.
2. If unable to fill under the provision of "1" above, bids shall be accepted from employees in the next lowest classification, with qualifications and District date-of-hire seniority to prevail and, simultaneously, from employees from comparable/parallel classifications, with qualifications and District date-of-hire seniority to govern.
3. For purposes of promotional bidding only into the BART Professional Chapter, the following positions shall be considered comparable/parallel:

Senior Clerk - Administrative Secretary - EA III

Intermediate Clerk - Senior Secretary - EA II

Clerk - EA I

B. Information Center (ACDS)/RS&S Trouble Desk - Prior to District-wide bidding, vacated and/or newly created positions shall be bid within the Information Center and RS&S Trouble Desk, with classification seniority to govern. Upon completion of Information Center or RS&S Trouble Desk bid, vacant shifts shall be posted District-wide.

C. Bids For Positions

Bids for positions in the Clerical Subunit shall be considered in the following order:

Clerical Sub-Chapter

Clerk: OT, CIV, CIII, CII

Clerical Foreworker: CFII, CFI, OT, CIV, CIII, CII

Secretary: SIII, SII

Engineering Aide: EAIII, EAII, EAI

BART Professional Chapter

Staff Assistant\*: SAIV, SAIII, SAII, SAI (by functional classification)

\*refer to pay grades in Section 28.2

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**24.2 MAINTENANCE SUBUNIT \***

- A. Employees within the classification in which a job opening exists shall be afforded the first opportunity to select the job opening based on classification seniority in accordance with the Advance Bid Procedure, Section 24.5.
- B. If unable to fill from the Advance Bid Procedure, Section 24.5, the supervisor, in conjunction with the steward, shall contact the senior qualified employee in the next lowest classification and offer said employee the vacant position. If the employee accepts the promotion, the vacancy in the higher classification will not be posted for bid.
- C. The above procedure shall apply to all descending functional classifications, with classification seniority and qualifications to govern.
- D. Upon completion of intra classification bidding, all moves shall be accomplished within a period of two (2) calendar weeks. If employee is not moved within the specified two (2) week period, the affected employee will be compensated at the applicable rate of the awarded position for all hours worked thereafter until the move, pursuant to bid, has been completed.
- E. Employees shall be ineligible to bid when a job opening in their classification is offered system-wide.
- F. Upon return from an authorized absence of thirty (30) working days or less, an employee shall have five (5) working days in which to bid into any job opening which occurred during said absence, with classification seniority and qualifications to govern. If the job opening

has been filled, the returning employee shall have bumping rights only to vacancies which have occurred within the last thirty (30) working days. For absences beyond thirty (30) working days, the employee shall submit an "Advance Bid Form" prior to departure for said leave. No retroactive pay shall be allowed.

G. A complete classification rebid shall be accomplished only with the mutual agreement of the Union and the District, with the understanding that both parties shall strive towards accomplishing the rebid in the most efficient manner.

H. (Addendum to Maintenance Bidding Procedures)

It is agreed Hayward Shop Component Repair Section will be considered as a separate entity divorced from Service and Inspection and Main Repair Organization at Hayward in accordance with the Advance Bid Procedure, Section 24.5.

#### **\* Minute Clarification**

Vacancies in Maintenance Subunit classifications which are identified as "continuously open" will be filled through the Internal Maintenance Bidding Eligibility List. Full-time District employees can apply for consideration for any identified Maintenance Subunit position (lateral or promotion) on a continuous basis. When the District elects to fill a vacancy, the name(s) of pre-qualified candidates will be referred to the hiring supervisor upon the completion of the Process identified in Section 24.2(A).

Maintenance positions which the District elects to fill that are not filled through the Internal Maintenance Bidding List will be posted for two (2) weeks.

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### **24.3 SYSTEM-WIDE BIDDING \***

All employees are eligible to bid on open positions posted system-wide in accordance with this section based on qualifications and District date-of-hire seniority. Bidding will not be permitted for employees while serving an initial probationary period, i.e. new hire (excluding bidding via ABF for shifts/RDOs).

However, if the open position is within the Maintenance Subunit, employees in that subunit shall be afforded the first opportunity to be selected for the job opening based on qualifications and District

date-of-hire seniority. If unable to fill the open position within the Maintenance Subunit, priority of selection to said job opening(s) shall be given to employee(s) within the Clerical Subunit, then to all other District employees based on qualifications and District date-of-hire seniority.

If the open position is within the Clerical Subunit, employees in that subunit shall be afforded the first opportunity to be selected for the job opening based on qualifications and District date-of-hire seniority. If unable to fill the open position within the Clerical Subunit, priority of selection to said job opening(s) shall be given to employee(s) within the Maintenance Subunit, then to all other District employees based on qualifications and District date-of-hire seniority.

Employees within the Maintenance Subunit shall be ineligible to bid when a job opening in their classification is offered system-wide. (Ref: Section 24.2). The following bidding procedure shall apply:

A. Job openings shall be posted on or before Monday of each week and shall remain posted until Friday afternoon.

Employees shall bid on open positions by placing their bid forms in the appropriate bid box. Bids shall be collected by the steward and/or supervisor at 2:00 p.m. Friday and logged with the clerk at each location. The steward shall retain one (1) copy to keep on file. The bids shall then be forwarded immediately to the clerk at the Employment Office. The clerk shall log each bid upon receipt. In the alternative to using the bid box, the employee or steward may hand carry any bids to the employment office. Any bid delivered in this manner must be received at the employment office no later than 2:00 p.m. on the day of the closing of the bid and be signed by a Union steward.

B. Job openings shall contain functional classification, pay grade, hours, RDOs, location and supervisor.

C. Each central location shall be provided a clear covered bulletin board and a bid box both to be locked, and the steward shall be provided keys. Central locations are Lake Merritt Platform level, Concourse, 2nd floor, Civic Center Station, Cash Handling Building, Plant Support Building, Concord Shops, Richmond Shops, Hayward Shops, Daly City Shops, and Oakland Shops. Any additions or deletions shall be mutually agreed upon by the District and the Union.

- D. The District shall provide copies of the job opening to the steward for each location and to the Union Chairperson. The steward shall be responsible to post the job openings.

**\* Minute Clarification**

The steward will endeavor to print their name under the signature line for recognition purposes only.

**\* Minute Clarification**

Notwithstanding any other provision of this agreement, an open vacant Irrigation Worker position shall be filled first by the most senior Groundswoker who possesses the qualifications required by the District for the position, as reflected in current practice.

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**24.4 SYSTEM-WIDE POSITION AWARD**

- A. Only bids deposited in the bid box or by the employee or steward hand carrying bids to the employment office shall be accepted. Any bid delivered by the employee or steward must be received at the employment office no later than 2:00 p.m. on the day of the closing of the bid and be signed by a Union steward. Manifold bid forms consisting of four (4) parts shall be provided at each bid box.
- B. All job openings shall be posted within two (2) weeks of the job opening. Awards shall be made within two (2) weeks of the closing of the posting. The successful bidder shall commence new assignment within two (2) weeks of the award. Should the District fail to make the new assignment within the specified two (2) week period, the affected employee will be compensated at the applicable rate for the awarded position for all hours worked thereafter until the move, pursuant to bid, has been completed.
- C. The Chief Steward in the area of vacancy shall be furnished a copy of each award, along with a list of unsuccessful bidders listed in seniority order.
- D. The Union President shall be provided a quarterly seniority roster by classification and date-of-hire seniority.
- E. The District shall return one (1) copy of the employee's bid sheet to the employee. This copy shall state whether the employee has been accepted or rejected for the job opening. If the employee has been

rejected, the returned bid shall state the reasons for said rejection and shall be subject to the grievance procedure.

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## 24.5 ADVANCE BID PROCEDURE

Within each Functional Classification of the Maintenance Subunit, all employees shall be required to have on file at all times with the District an Advance Bid Form indicating their priority preferences for shift, rest days and work location for their classification.

While there is no limit on the number of forms an employee may submit, only the most current form will be used to fill an open position, provided the most current form was filed by the employee at least twenty-four (24) hours prior to the bid, the last form on file immediately preceding the twenty-four (24) hours before the bid shall be used.

A Chief Steward and District designee (clerical) shall process the advance bid procedure.

Position awards made as a result of the advance bid form shall be final and binding upon the employee and the District.

Should the District be unable to fill a position opening by means of the above procedure, said position shall be posted for bid in accordance with the System Bidding Procedure (Section 24.3).

Any changes in bid specifications (such as RDOs, shift, work location, hours, or newly created or vacant existing positions that are not subject to Section 24.3) must be posted at least seven (7) days prior to processing through this procedure.

The Union will be given at least seven (7) days prior notice of any District intention to redline or abolish a position.

All Advance Bid information and material shall remain confidential.

Implementation procedures are as follows:

1. (a) A job is eliminated or
  - (b) A job is eliminated and a new job is created
  - (c) A vacant position is to be filled that is not subject to Section 24.3

2. (a) Maintenance employee persons whose jobs have been eliminated will then use ABF to go to where their seniority will carry them. Example: #1 choice is checked; if a senior person is in that job then #2 choice is checked. This continues until a junior person is filling a particular choice. The person whose job was eliminated then takes this job. The process is repeated with the affected employee. This will continue through the seniority list until:
  - 1.)The last person fills the open slot or
  - 2.)The affected employee fills an open slot
  - 3.)The last affected employee is assigned an open slot because their ABF did not reflect a choice held by a junior employee or
  - 4.)If no open slots are available then a Reduction in Force has been initiated and Section 25.2 is followed.
- (b) In the case of I(b), the newly created job is bid as in the normal way of an ABF Procedure. When the bid reaches the person whose job was eliminated then this person has their #1 choice checked to see if it is occupied by a senior or junior employee. If a senior employee is holding the slot, their #2 choice is checked. This continues until a choice is held by a junior employee. This employee will then follow this same procedure. The bid continues through the entire seniority roster until:
  - 1.)The last person fills the open slot or
  - 2.)The last affected person is assigned the open slot because his ABF did not reflect a choice occupied by a junior employee.
  - 3.)At the conclusion of the ABF procedure and at least five (5) days prior to the effective date of implementation, the District shall post the position awards in the same manner and locations as the original notice to conduct an ABF. All affected employees shall remain in their positions until the effective date of the change over.

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#### **24.6 FOREWORKER EVALUATION COMMITTEE \***

A Foreworker Evaluation Committee shall be established to evaluate candidates for promotion to Foreworker. This Committee shall be composed of three (3) individuals designated by Management and three

(3) by the Union. The individuals designated by the Union shall be from the Foreworker classification. The Committee shall consider all bids of qualified applicants previously screened against the Foreworker qualifications specifications as provided for in Side Letter (SEIU-1-3). The Committee shall establish procedures for making recommendations for promotion consistent with the District Affirmative Action Policy. The recommendations by the Committee shall not be reversed by the District except for just cause or unless it is clearly demonstrated that the Committee has abused its wide discretion to make selections among applicants. Criteria for promotion will include examination of the personnel file, attendance record, previous work experience, previous training and experience, merit, ability, leadership potential and education. Where qualifications are equal, seniority shall prevail in making recommendations and any employee who applied for promotion with a higher seniority than the employee selected will be given an interview with a Management member of the Committee explaining its decision. The Union may submit to arbitration under the arbitration terms of the Agreement any grievance of such individuals. The issue in said arbitration will be whether the Foreworker Evaluation Committee clearly abused its discretion or violated the District Affirmative Action Policy or whether the District representative making the final decision reversed the recommendation of the Committee without just cause. Pending such appeal, the selected individual or individuals shall serve in the position(s).

#### **\* Minute Clarification**

The Committee may seek the aid of the Human Resources staff for assistance in the development of criteria for standard selection procedures.

In reference to the above- mentioned criteria, the Maintenance Foreworker Selection Guidelines dated March 29, 1983 shall be used as the current criteria, and if changed a copy shall be forwarded to the Union.

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## **24.7 RELIEF SHIFT**

The District may establish positions designated as Relief Shift positions.

Such positions may be utilized for job assignments involving multiple starting times and report locations which cannot be covered through the normal fixed work location procedures with the available personnel.

Such positions shall be filled through the normal bidding procedures.

Employees awarded such positions shall be granted a twelve percent (12%) differential above the base rate of pay for the classification for all hours worked.

There will be no reduction in the affected classification workforce as a specific result of the implementation of this Section.

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#### **24.8 ELIGIBILITY BIDDING POOLS**

Employees may bid on jobs within the maintenance subunit that are "continuously open" through the Internal Eligibility Pool.

The following procedure will apply for admittance into any Internal Eligibility Pool:

- A. Employees must submit a separate short form application and resume for each position that they are interested in. Each application received by Human Resources will be date stamped.
- B. The application is then forwarded to the Human Resources Department for "paper screening" to ensure that the required Minimum Qualification are met by the applicant. Human Resources will acknowledge, in writing within ten (10) days, the receipt of the application to the employee.
- C. Human Resources will inform the applicant if they are rejected so that the applicant may submit additional information for future review and consideration.
- D. Where the employee meets the Minimum Qualifications and passes required tests, as applicable, the employee's application will be forwarded to the hiring supervisor by Human Resources within two (2) weeks. Where practicable, the hiring supervisor will interview the applicant in a timely manner.
- E. It will be the hiring supervisor's responsibility to verify the applicant's stated experience and documentation. The hiring supervisor will then make arrangements for any interview or any additional testing, if required.
- F. Once the hiring supervisor has made the determination that the employee meets the requirements, the employee's name will be added to the Internal Eligibility Pool.

The Human Resources Department will forward to the Union a quarterly listing of all Internal Eligibility Pools. Employees in the Internal Eligibility Pool will be listed in seniority order by District Date-of-Hire.

Job positions that come open will be filled in the following manner:

1. The Human Resources Department will contact the senior employee by Date-of-Hire and offer the position to the employee.
2. If the senior employee declines the position, the next senior employee will be offered the job. This will continue until the position is filled.
3. Any employee who declines a position will still remain in the Internal Eligibility Pool.

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## 25.0 REDUCTION IN FORCE

### 25.1 CLERICAL \*

In the event of a reduction in force within the Clerical Subunit, classification seniority shall be first controlling, in inverse order.

Thereafter, an employee may revert to any position or classification previously held or for which the employee is otherwise qualified by utilization of District date-of-hire seniority.

If an employee reverts to a position the employee has or has not previously held, but is qualified to hold, employee's date-of-hire seniority shall be employee's classification date in that position.

In the event a vacant position exists, or will soon be created, within the classification of an employee whose position has been abolished, said vacancy shall not be posted. The Clerical Chief Steward shall contact the employees involved in any potential reduction in force and, in seniority order, determine whether any of such employees are interested in the vacant position(s). Employees shall have no more than thirty (30) minutes in which to accept or reject said vacant position.

Thereafter, the same procedure shall apply to descending classification, as applicable.

In the event a vacant position exists and no reduction in force is in progress, the vacant position will be made available, prior to becoming available through the bidding process, to any qualified employee

separated from the District through a reduction in force based on date-of-hire seniority.

An employee may not bump into a position of a higher rate of pay than that of any previously held position.

**\* Minute Clarification**

If the Reduction In Force begins in the Staff Assistant unit, the BART Professional Chapter President shall be contacted in order to conduct the RIF until the process has been completed within the Staff Assistant unit.

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## **25.2 MAINTENANCE**

- A. In the event of a reduction in force within a functional classification, classification seniority shall first be controlling in inverse order.
  - B. Thereafter, an employee must first revert to any position or classification previously held for which the employee is otherwise qualified by utilization of District date-of-hire seniority. The employee's classification seniority date shall be the original date of entry into the classification.
  - C. However, an employee may bump to any position or classification not previously held, or for which the employee is otherwise qualified by utilization of District date-of-hire seniority. The employee's classification seniority date shall be the date of entry into the classification.
    - 1. The employee must first bump into any open/unfilled position within the classification, or
    - 2. If no open/unfilled position exists, the employee may use his/her date-of-hire seniority to bump within the classification.
    - 3. The person whose job was bumped shall exercise his/her seniority to bump within the classification.
    - 4. Thereafter, all bumps for affected employees in lower classification shall be governed by District date-of-hire seniority.
-

### 25.3 RECALL

- A. In the event any position is reinstated or there becomes an opening, the position shall first be offered within the functional classification. Thereafter:
1. Employees separated from the classification due to a reduction in force shall be afforded a single option to be reinstated to the classification in the inverse order in which they were removed. If the affected employee has subsequently bid to a new classification, he/she shall have a single option to utilize this section.
  2. The affected employee shall select any open position within the classification.
  3. Classification seniority shall be the original date of entry into the classification.
  4. Employees separated from the District shall have the option of applying for a position in a lower classification at a lower pay level. However, said employee can reject such an offer and still remain on the recall list.
- B. Employees separated from the District by reduction in force shall be recalled (reinstated) by District date-of-hire seniority based on the following formula: each employee shall have recall rights for a period of two (2) years from the date of separation. Seniority for such recalled employees shall continue up to reinstatement. In the event any position is reinstated or opened, the position shall be first put through the bid procedure within the pick unit. Thereafter:
1. The recalled employee shall first bump into the classification by use of original classification seniority.
  2. The person whose job was bumped shall exercise his/her seniority to bump within the classification.
- C. The District shall send Notices Of Recall (reinstatement) by certified mail, return receipt requested, or by email and shall copy the union on all notices by email. The District shall be responsible for notifying an employee only if the employee has provided the District with the correct email and mailing address. Employees on the reinstatement list shall have ten (10) calendar days from the receipt of certified mail or email to accept or reject the reinstatement. Employees shall have the right to reject, without prejudice, offers of re-employment of less than sixty (60) calendar days. Acceptance shall be made by email or

certified mail, return receipt requested. Absent illness and/or disability, failure to accept or reject reinstatement within ten (10) calendar days will result in loss of recall rights. Notice and proof of illness and/or disability must be supplied to the District within ten (10) calendar days from the date of recall notice.

- D. No job training of the displacing employee other than familiarization/orientation shall be provided by the district. The District shall advise each affected employee at the time of layoff of the phone numbers for employment "hot lines" for available positions.

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## 26.0 PROBATION

### 26.1 NEW HIRES

Any new or rehired District employee (other than recall from layoff) shall, for the first one hundred twenty (120) calendar days of service be considered a Probationary employee. The District shall evaluate each such employee following the sixtieth (60<sup>th</sup>), ninetieth (90<sup>th</sup>), and one hundred tenth (110<sup>th</sup>) calendar day of employment, and evaluations shall be reviewed with each employee.

Each employee, upon request, shall be entitled to Union representation with regard to such evaluation. However, probationary dismissals shall not be subject to the grievance procedure except where evaluations have not been written in a timely manner or where discrimination, as defined elsewhere in this Agreement, is charged.

A probationary employee shall have no seniority rights but, upon completion of the probationary period, such rights will date back to the date of employment.

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### 26.2 PROMOTION WITHIN THE BARGAINING UNIT \*

- A. An employee who has been promoted or has accepted a downward or lateral bid shall have the option for sixty (60) calendar days to revert to his/her former position without loss of seniority or other benefits. The first day of "reversion" period shall coincide with the commencement of the Probationary Period.
- B. The first day of the Probationary Period shall commence on the day when the successful bidder has been actually assigned to perform the

duties of the awarded job. An employee who has been promoted shall be evaluated following the thirtieth (30<sup>th</sup>), sixtieth (60<sup>th</sup>) and eightieth (80<sup>th</sup>) calendar day and the evaluation shall be reviewed with each employee. Upon satisfactory completion of the Probationary Period, the employee's classification seniority date shall be the date upon which the job was awarded rather than the date on which the work of the new job was actually assigned.

- C. In the case of Maintenance, lateral bids with no change in classification, for the purposes of RDOs, shift and/or location change, the sixty (60) day option shall not apply.
- D. If an employee is rejected from the position during the probationary period, he/she shall have the option to revert to his/her former position without loss of seniority or other benefits.
- E. In the event of A or D above, if the position previously held has been eliminated, the employee shall have bumping rights to a position within the classification previously held.
- F. Employees who are rejected for promotion under this Section (Paragraph D) have the right to grieve said rejection.

**\* Minute Clarification**

The parties agree that they may mutually agree to extend the probationary period including reversion rights, of an employee under this Section beyond the day period up to a maximum of one hundred eighty (180) days on a case-by-case basis, in order to better evaluate the employee.

Requests by the District for such extensions will not be unreasonably denied by the Union.

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**26.3 EMPLOYEES HOLDING / ACCEPTING POSITIONS OUTSIDE THE BARGAINING UNIT**

- A. An employee who accepts a position outside the bargaining unit shall have the option to revert to his/her former position for a period of sixty (60) days without loss of seniority or other benefits.
- B. If an employee under this Section is rejected for a position during the probationary period, he/she shall have the option to revert to his/her former position without loss of seniority or other benefits.

- C. In the event of A or B above, if the previously held position has been eliminated, the employee shall have bumping rights to a position within the classification previously held.
  - D. The benefits of this Section shall not apply to an employee who is not a member of the Union in "good standing". A member in "good standing" is defined as a member of the Union who continues to pay full Union dues.
  - E. Employees who comply with Paragraph D shall be entitled to revert to the bargaining unit with their original date-of-hire. Classification seniority shall not be accrued for time spent outside the bargaining unit.
- 

## **27.0 TEMPORARY POSITIONS**

### **27.1 POSITION ASSIGNMENT \***

#### **A. Temporary Vacancy - Clerical Subunit**

1. For the first sixty (60) days of any temporary vacancy, the District may upgrade any employee from the next lowest classification in the Department with District date-of-hire seniority and qualifications to govern, and will not be obligated to post such opening for bid. Should the employee in the department accept the position, the resulting vacancy shall be filled by temporary agency personnel.
2. If the employee in the next lowest classification in the department rejects the position, the District may upgrade an employee from the next lowest classification outside the department with District date-of-hire seniority and qualifications to govern.

If the employee from outside the department accepts the position, the resulting vacancy shall be filled by temporary agency personnel.

If the employee outside the department rejects the position, the original vacancy shall be filled by temporary agency personnel.

3. If there is not an employee to upgrade in the department in the next lowest classification or the employee in the department in the next lowest classification does not qualify, the District may upgrade an employee outside the department in the next lowest classification with District date-of-hire seniority and qualifications

to govern. If the employee outside the department accepts the position, the resulting vacancy shall be filled by temporary agency personnel.

If the employee outside the department rejects the position or does not qualify, the District may upgrade an employee from the next lower classification in the originating department with District date-of-hire seniority and qualifications to govern.

If the employee in the department accepts the position the resulting vacancy shall be filled by temporary agency personnel.

If the employee in the department rejects the position or does not qualify, the original vacancy shall be filled by temporary agency personnel.

4. In the event the temporary vacancy extends beyond the sixty (60) day period, but there is reasonable cause to believe the employee who vacated the position temporarily will soon return, the temporary assignment may be extended by mutual agreement of the District and the Union.
5. In the event the temporary assignment extends beyond the sixty (60) day period and there is reasonable cause to believe the employee who vacated the position will continue to be absent for a significant additional period of time, the vacant position will be posted for bid consistent with the seniority provisions of this Agreement. Such posting will be carried out with the understanding the employee who secures the position via bid will hold the new position on a temporary basis for the first nine (9) months, and may be caused to return to his/her former position if the original incumbent returns within that time. If his/her former position no longer exists, he/she shall be afforded the right to utilize his/her classification seniority rights with his/her former classification and Functional Classification. (Where "Functional Classification" is used above, it is understood it could refer to "Section" or "Classification", depending on the seniority provisions of the particular subunit.)
6. This Section shall not be utilized to circumvent the assignment of an employee to a higher classification on a permanent basis.

#### **B. Temporary Vacancy - Maintenance Subunit**

1. For the first thirty (30) days of any temporary vacancy, the District may assign any employee by classification seniority within the

Functional Classification to perform that work, and will not be obligated to post such opening for bid. If unable to fill the vacancy from within the Functional Classification, the District may select an employee from outside the Functional Classification with District date-of-hire seniority and qualifications to govern. In the event the temporary vacancy extends beyond the thirty (30) day period, but there is reasonable cause to believe the employee who vacated the position temporarily will soon return, the temporary assignment may be extended by mutual agreement of the District and the Union.

2. In the event the temporary assignment extends beyond the thirty (30) day period and there is reasonable cause to believe the employee who vacated the position will continue to be absent for a significant additional period of time, the vacant position will be posted for bid consistent with the seniority provisions of this Agreement. Such posting will be carried out with the understanding the employee who secures the position via bid will hold the new position on a temporary basis for the first nine (9) months, and may be caused to return to his/her former position if the original incumbent returns within that time. If his/her former position no longer exists, he/she shall be afforded the right to utilize his/her classification seniority rights with his/her former classification and Functional Classification. (Where "Functional Classification" is used above, it is understood it could refer to "Section" or "Classification", depending on the seniority provisions of the particular subunit.)
3. This Section shall not be utilized to circumvent the assignment of an employee to a higher classification on a permanent basis.

### **C. Return to Work**

1. In the event the absent incumbent does not return within those nine (9) months or, if at the time of the initial absence there is reasonable cause to believe the absence will extend in excess of nine (9) months, the District may fill the vacant position on a permanent basis, while only guaranteeing the absent incumbent the right to return to an open position to his/her former classification at the then-existing rate.
2. In the event the absent incumbent returns after nine (9) months and no open position exists in his/her former classification, the employee will be offered any existing open position in a

classification as near as possible to his/her original classification and qualifications. Paragraphs A2), B2) and C1) of this Section do not apply to industrial injuries.

3. If no open position exists pursuant to C.1 or C.2 above, the employee shall be deemed on inactive layoff status eligible for recall in the same manner and for the same duration as provided under section 25 of this Agreement.

#### **D. Specific Project Assignments**

By mutual agreement of the employee and the Union, the employee may be assigned to report to locations other than their bid locations. This provision is only applicable to Track and Structures, Power/Mechanical and Plant Support pick-units.

Employees who are assigned away from their bid work location for two (2) consecutive work days or more may be required to report directly to, and be released from, an alternate work location for the duration of the assignment at no additional cost to the District. The duration of the assignment will not exceed thirty (30) days. The parties understand that such assignments away from the employees' normal reporting locations will be in those situations where employees are working on a specific project for the above referenced pre-determined time-frame. The Union will be given at least one week's notice to provide a list of employees who will be required to report directly to their work assignment.

The District shall provide all necessary tools and equipment to perform the job. When practical and feasible the District will provide restroom and clean-up facilities.

##### **\* Minute Clarification**

The District agrees that it is not the intent of this Section to create an unreasonable hardship on employees. In making such assignments, the District will consider factors such as availability of parking, availability of public transportation and geographic location.

##### **\* Minute Clarification**

The parties agree that a temporary vacancy is defined as the opening of a bid position due to a vacancy or any other temporary absence of the incumbent for any reason.

This clarification does not preclude the District from exercising its right to determine whether or not a vacant position will be filled.

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## **27.2 TEMPORARY UPGRADE**

An employee temporarily assigned by the District who performs duties in a higher classification, will receive the first entry rate of such higher classification, or five percent (5%) above their present rate of pay, whichever is greater, as acting pay while fulfilling said assignment. No reduction in pay shall occur because of any temporary assignment.

This Section shall not be utilized to circumvent the assignment of an employee to a higher classification on a permanent basis.

An employee who performs one or more of the duties in a higher classification, and who receives temporary upgrade pay, shall not be deemed qualified for the higher classification unless the employee can demonstrate that he/she can perform the full scope of the duties of the higher classification.

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## **27.3 PART-TIME EMPLOYMENT AND TEMPORARY AGENCY EMPLOYMENT**

### **A. Temporary-Agency Employment - Clerical Subunit**

1. Temporary work performed within the bargaining unit shall be established under the following conditions:
  - a. Filling vacancies of employees during an extended absence or in a leave without pay status;
  - b. Staffing positions established for a specific project(s) with a scheduled time of completion and which may be funded totally or in part from sources other than the District's normal operational budget;
  - c. Staffing positions on a short duration basis or for extraordinary tasks beyond those which can normally be accomplished by using bargaining unit personnel on an overtime basis;
  - d. Except as provided above, no bargaining unit position shall be filled under this Section.

2. Temporary assistance pursuant to this Section shall be selected from temporary employment agencies.

#### **B. Part-Time Employment - Maintenance Subunit**

The District may establish an alternate work week consisting of part-time shifts of less than forty (40) hours per week.

1. Temporary work performed within the bargaining unit shall be established under the following conditions:
  - a. Filling vacancies of employees during an extended absence or in a leave without pay status;
  - b. Staffing positions established for a specific project(s) with a scheduled time of completion and which may be funded totally or in part from sources other than the District's normal operational budget;
  - c. Staffing positions on a short duration basis or for extraordinary tasks beyond those which can normally be accomplished by using bargaining unit personnel on an overtime basis;
  - d. Except as provided above, no bargaining unit position shall be filled under this Section.
2. Employees hired under this plan shall be governed by the following conditions:
  - a. All such part-time personnel hired into bargaining unit positions shall be represented by Service Employees International Union Local 1021;
  - b. Such employees will be required to pay monthly Union dues by standard payroll deduction;
  - c. Any such employees subsequently hired into a full-time position shall be subject to pay the standard initiation fee of SEIU Local 1021 in accordance with the applicable sections of this Agreement;
  - d. Such employees will be paid the applicable rate of pay for the functional classification to which assigned. An additional ten percent (10%) of the base pay shall be paid in lieu of all other fringe benefits, except those deductions required by law;

- e. Such employees will be guaranteed a minimum of four (4) hours pay for reporting to work under authorization of proper authority;
  - f. The Human Resources Department will be the sole determinant for the staffing, hiring or termination of such employees;
  - g. Normal temporary vacancies created by the absence of full-time employees shall first be filled in accordance with the other applicable sections of this Agreement;
  - h. No floating or birthday holidays will be paid such employees. Other holidays will only be paid if the holiday falls within the part-time employee's scheduled workweek, and the employee actually works his/her full scheduled shift the day before and the day after the holiday.
3. Full-time employees shall be eligible to apply for and be considered for part-time positions. However, said employee will be governed by the terms and conditions of this Section if selected for a part-time position.
4. Part-time employees who have been employed for three (3) or more consecutive months and are then placed in a full-time position shall be considered a probationary employee for the first sixty (60) calendar days, provided the part-time and full-time position is in the same functional classification. Regardless of the amount of time served as a part-time employee, the employee must still be on probation for sixty (60) calendar days. Seniority begins on the first day of permanent, full-time employment after the probationary period has been successfully completed.
5. In addition to the conditions noted hereinabove, the following sections of the Agreement are applicable:
- 3.1, 3.2, 3.3, 3.6, 4.3, 7.2, 8.1, 8.2, 9.2, 9.5, 10.0, 11.1, 11.2, 11.3, 11.4, 12.0, 14.1, 14.2, 16.0, 18.0 and 28.1.
6. All sections of the Agreement not listed above shall not apply to part-time employees.
-

**28.0 CLASSIFICATION & PAY****28.1 JOB DESCRIPTIONS \***

Employees shall be provided copies of their Classification Job Descriptions upon request.

In the event an employee believes he/she is working out of classification, said dispute shall be subject to the grievance procedure.

New or revised job descriptions shall be forwarded to the Unions for review.

Changes in job descriptions shall be subject to the grievance procedure, with retroactive compensation on judgment in favor of the grievant.

**\* Minute Clarification**

The parties agree that periodically they may mutually review the backlog of desk audit requests and agree to rearrange the order of conducting desk audits for employees represented by SEIU Local 1021.

**28.2 FUNCTIONAL CLASSIFICATION 1\***

**PICK UNITS:** Classifications as established in the organizational structure of the Clerical and Maintenance Subunits shall continue as set forth in this Agreement. No deletions and/or modifications of Functional Classifications shall be effective without mutual agreement by the two parties.

**MAINTENANCE SUBUNIT****PICK UNIT****DEPARTMENT**

Automatic Fare Collection	Maintenance & Engineering
Cash Handlers	Controller/Treasurer
Communication	Maintenance & Engineering
Computers	Maintenance & Engineering
Inspectors	Rolling Stock & Shops
Oakland Shops/Support Facilities	Maintenance & Engineering
Plant Support	Maintenance & Engineering
Power/Mechanical	Maintenance & Engineering
Shops	Rolling Stock & Shops
Shops-Vehicle	Rolling Stock & Shops
Stores	Materials Management &

System Service  
Track & Structures  
Train Control  
Training

Procurement  
Transportation & System Service  
Maintenance & Engineering  
Maintenance & Engineering  
Maintenance & Engineering

**CLERICAL SUBUNIT**

**PICK UNIT**

**DEPARTMENT**

Clerical  
Engineering Aide  
Secretarial  
Staff Assistant

(All)  
(All)  
(All)  
(All)

<u>Functional Classification</u>	<u>Pay Grade</u>	<u>Pick Unit</u>
Accountant	(8)	Staff Assistant
Accounting Analyst	(11)	Staff Assistant
Accounting Technician	OT	Clerical
Administrative Analyst	(8)	Staff Assistant
Administrative Secretary	S III	Secretarial
Administrative Support Officer	(13)	Staff Assistant
Administrative Technician	OT	Clerical
Applications Programmer Analyst +	(8)	Staff Assistant
Assistant Administrative Analyst	(6)	Staff Assistant
Assistant Buyer	(6)	Staff Assistant
Assistant Contract Administrator	(6)	Staff Assistant
Assistant Safety Specialist	(6)	Staff Assistant
Assistant Treasury Analyst	(6)	Staff Assistant
Auditor	(11)	Staff Assistant
Automatic Fare Collection Electronic Technician	MW III	Automatic Fare Collection
Automatic Fare Collection Foreworker	FP*	Automatic Fare Collection
Automotive & Equipment Mechanic	MW III	Oakland Shops/ Support Facilities
Automotive & Equipment Foreworker	FP*	Oakland Shops/ Support Facilities
Budget Analyst	(8)	Staff Assistant
Budget Monitor	(6)	Staff Assistant
Buildings Foreworker	FP*	Plant Support
Buildings Worker	MW III	Plant Support
Buyer	(8)	Staff Assistant
Buyer Technician	OT	Clerical
CAD Drafter	(8)	Staff Assistant
Cash Handler	CH III	Cash Handlers
Cash Handling Electronic Technician	MW III	Cash Handlers

Cash Handling Foreworker	FP*	Cash Handlers
Clerk	C II	Clerical
Communications Electronic Technician	MW III	Communications
Communications Foreworker	FP*	Communications
Computer Documentation Assistant	C IV	Clerical
Computer Electronic Technician	CS III	Computers
Computer Operator	C IV	Clerical
Computer Support Coordinator	(14)	Staff Assistant
Contract Administrator	(8)	Staff Assistant
Customer Services Administrator	(13)	Staff Assistant
Customer Services Assistant	C IV	Clerical
Customer Services Clerk	C IV	Clerical
Customer Services Representative	(11)	Staff Assistant
Data Controller	C IV	Clerical
Data Entry Operator	C III	Clerical
Documentation Configuration Controller	(9)	Staff Assistant
Drafting Supervisor	(11)	Staff Assistant
Dump Truck Equipment Operator	MW III	Plant Support
Electrical Foreworker	FP*	Power/Mechanical
Electrical Helper	MW I	Power/Mechanical
Electrician	MW III	Power/Mechanical
Electronic Repair Shop Foreworker	FP*	Shops
Electronic Repair Shop Technician	MW III	Shops
Electronic/ Electronic- Mechanical Assembler	MW I*	Shops
Elevator/ Escalator Foreworker	FP*	Power/Mechanical

Elevator/ Escalator Worker	MW III	Power/Mechanical
Employee Development Specialist	EDS	Training
Employee Development Specialist	EDS	Shops-Vehicle1
Expeditor	(6)	Staff Assistant
Expeditor Clerk	C IV	Clerical
Fire Protection Worker	MW III	Power/Mechanical
Fire Service Worker	MW III	Track & Structures
Government & Community Relations Specialist	(11)	Staff Assistant
Graphic Artist	(9)	Staff Assistant
Graphics Coordinator	(11)	Staff Assistant
Grounds Foreworker	FP*	Plant Support
Grounds Worker	MW II	Plant Support
Grounds Worker/Applicator	MW III	Plant Support
Intermediate Account Clerk	C III	Clerical
Intermediate Clerk	C III	Clerical
Inventory Control Analyst	(8)	Staff Assistant
Inventory Control Clerk	C III	Clerical
Inventory Control Monitor	(6)	Staff Assistant
Inventory Control Technician	OT	Clerical
Irrigation Grounds Worker	MW III	Plant Support
Junior Accountant	(5)	Staff Assistant
Junior Applications Programmer Analyst +	(3)	Staff Assistant
Junior Computer Operator	C III	Clerical
Legal Administrative Analyst	(6)	Staff Assistant
Legal Administrative Assistant	(5)	Staff Assistant
Librarian	(8)	Staff Assistant
Locksmith	MW III	Plant Support
Maintenance Planner	(8)	Staff Assistant

Marketing Traffic Coordinator	(11)	Staff Assistant
Material Control Analyst	(8)	Staff Assistant
Material Control Systems Analyst	(8)	Staff Assistant
Material Coordinator	MW III	Track & Structures
Material Coordinator	MW III	Oakland Shops/Support
Material Expeditor	(8)	Staff Assistant
Office Services Support Clerk	C III	Clerical
Overhead Door Worker	MW III	Power Mechanical
Painter	MW III	Plant Support
Power and Mechanical Foreworker	FP*	Power/Mechanical
Power and Mechanical Worker	MW III	Power/Mechanical
Project Control Administrator	(8)	Staff Assistant
Public Information Representative	(11)	Staff Assistant
Quality Assurance Analyst	(8)	Staff Assistant
Quality Team Leader	QTL	Shops/Vehicle
Real Estate Officer	(11)	Staff Assistant
Real Estate Technician	OT	Clerical
Real Time Programmer Analyst	(11)	Staff Assistant
Reproduction & Records Technician	EA I	Engineering Aide
Reprographics Equipment Operator	C IV	Clerical
Rolling Stock Foreworker	FP*	Shops-Vehicle
Senior Account Clerk	C IV	Clerical
Senior Applications Programmer Analyst +	(11)	Staff Assistant
Senior Budget Clerk	C IV	Clerical
Senior Cash Handler	CH IV	Cash Handler
Senior Clerk	C IV	Clerical
Senior Graphic Artist	(10)	Staff Assistant
Senior Legal Secretary	S III	Secretarial
Senior Maintenance Planner	(11)	Staff Assistant

Senior Office Services Supervisor	(9)	Staff Assistant
Senior Office Support Clerk	C IV	Clerical
Senior Secretary	S II	Secretarial
Senior Storekeeper	SSK	Stores
Senior Telecommunications Technician	(14)	Staff Assistant
Senior Transit Information Clerk	C IV	Clerical
Shop Machinist	MW III	Oakland Shops/ Support Facilities
Shop Scheduler	(10)	Shops-Vehicle 1
Shop Welder	MW III	Oakland Shops/ Support Facilities
Storekeeper	MW II	Stores
Structures Equipment Operator	MW III	Track & Structures
Structures Foreworker	FP*	Track & Structures
Structures Inspector	INSP	Track & Structures
Structures Inspector Foreworker	FP*	Track & Structures
Structures Welder	MW III	Track & Structures
Structures Worker	MW II	Track & Structures
Survey Aide	EA I*	Track & Structures
Survey Technician	EA II*	Track & Structures
System Performance Analyst	EA III	Engineering Aide
System Service Foreworker	FP*	System Service
System Service Worker	UW*	System Service
System Service Worker	MW I*	System Service
Technical Administrator	(11)	Staff Assistant
Technical Editor	(3)	Staff Assistant
Technical Programmer Analyst	(11)	Staff Assistant
Technical Publication Analyst	(9)	Staff Assistant
Technical Publications Administrator	(10)	Staff Assistant

Technical Resources Administrator	(13)	Staff Assistant
Telecommunications Specialist	(6)	Staff Assistant
Telecommunications Technician	(9)	Staff Assistant
Time and Labor Administrative Analyst	(8)	Staff Assistant
Tool Room Attendant	MW I*	Power/Mechanical
Tool Room Attendant	MW I*	Oakland Shops/ Support Facilities
Track Equipment Operator	MW III	Tracks & Structures
Track Foreworker	FP*	Tracks & Structures
Track Welder	MW III	Tracks & Structures
Track Worker	MW II	Tracks & Structures
Train Control Electronic Technician	MW III	Train Control
Train Control Foreworker	FP*	Train Control
Transit Information Clerk	C IV	Clerical
Transit Information Supervisor	(9)	Staff Assistant
Transit Information Technician	OT	Clerical
Transit Vehicle Electronic Technician	MW III	Shops-Vehicle
Transit Vehicle Mechanic	MW III	Shops-Vehicle
Trouble Desk Data Specialist	OT	Clerical
Utility Foreworker	FP*	Shops-Vehicle
Utility Worker**	MW I*	Shops-Vehicle
Utility Worker**	UW*	Shops-Vehicle
Utility Worker**	UW*	Oakland Shops/ Support Facilities
Vehicle Inspector***	INSP***	Inspectors
Warranty Administrator	(11)	Staff Assistant
Wayside Inspector***	INSP*	Inspectors
Web Page Specialist	(10)	Staff Assistant

\*\* In same Pick Unit (Shops – Vehicle)

\*\*\* Inspectors report to Rolling Stock Foreworkers for personnel administrative purposes.

+ Positions constitute a “deep classification.”

**A. VEHICLE INSPECTORS IN ROLLING STOCK AND SHOPS**

During the 2009 negotiations, the District informed the Union that the District planned to eliminate the Vehicle Inspector classification and lay off twenty-two (22) Vehicle Inspector positions from Rolling Stock and Shops. After meeting and negotiating with the Union and considering the Union's interests, the District agrees not to lay off the twenty-two (22) incumbent Vehicle Inspectors. Instead, the twenty-two (22) incumbent Vehicle Inspectors in Rolling Stock and Shops shall perform the duties contained in the revised Vehicle Inspector class description. The Vehicle Inspector class job description is attached and incorporated into this Agreement as part of Appendix A.

When all incumbent twenty-two (22) Vehicle Inspectors have resigned, retired, or left the Vehicle Inspector Classification, the District shall eliminate the vacated positions. Three (3) Inspector positions currently assigned to perform receiving inspection will not be eliminated under this agreement.

The parties agree to joint participation in a collaborative effort to revise Rolling Stock and Shops Inspection procedures as defined in Book 132.

**B. QUALITY TEAM LEADER**

The District has established a new Quality Team Leader classification, placed it in the Shop-Vehicle pick unit, and negotiated an appropriate rate of pay with the Union. The Quality Team Leader class job description is attached and incorporated into this Agreement as part of Appendix A. The Union accepts the class job description and the pay grade of the MW III rate plus five percent (5%).

The parties agree to the following criteria for the selection of candidates for the Quality Team Leader position:

1. The District shall develop a testing and evaluation process for assessing candidates who meet minimum qualifications.
2. A study guide will be developed and distributed to all qualified applicants.
3. A score of eighty percent (80%) or higher on the testing and evaluation process shall be considered passing.
4. A pool of qualified candidates shall be established.
5. Positions shall be awarded from the pool on the basis of seniority.

### **C. TRANSIT VEHICLE MECHANIC AND TRANSIT VEHICLE ELECTRONIC TECHNICIAN**

The District has established a revised Transit Vehicle Mechanic class description and a Transit Vehicle Electronic Technician class description. The revised Transit Vehicle Mechanic and the revised Vehicle Electronic Technician classification descriptions are attached and incorporated into this Agreement as part of Appendix A. The Union accepts both revised class job descriptions and the pay grade. The District and the Union agree that the revised Transit Vehicle Mechanic and the revised Transit Vehicle Electronic Technician classifications have defined overlapping and interchangeable job duties and that employees must perform all duties in their class description. The Transit Vehicle Mechanic/Transit Vehicle Electronic Technician job description is attached and incorporated into this Agreement in Appendix A. As soon as the District provides training the employees must perform all duties in their class description.

### **D. UTILITY WORKER**

The District has established a revised Utility Worker class description that is attached and incorporated into this Agreement in Appendix A. The Union accepts the revised Utility Worker class job description and the pay grade. The District and the Union agree that the revised Utility Worker and the revised Transit Vehicle Mechanic classifications have defined overlapping and interchangeable job duties and employees must perform all duties in their class description. The interchangeable job duties have been incorporated in the attached class descriptions. The District agrees that it will provide appropriate tools training and/or individualized instruction, as needed, by an Employee Development Specialist, prior to requiring the Utility Worker to perform the new duties.

### **E. GROUNDWORKER (MWII) CLASSIFICATION DESCRIPTIONS**

Effective September 1, 2009, the District shall eliminate the Patio Worker sub-category of Grounds Worker. Affected Patio Workers may bump into vacancies including the Systems Service Worker Classification. The District shall red-circle Incumbent Patio Workers who bump into Systems Service Worker or other Classifications.

### **F. SYSTEM SERVICE WORKER AND GROUNDS WORKER**

The District and the Union agree that System Service Workers must perform all duties in the System Service Worker Classification

Description both inside and outside. Except for non-exclusive and overlapping duties, System Service Workers shall not perform Grounds Worker classification duties. Grounds Workers shall perform all duties in the Grounds Worker classification description. Except for non-exclusive and overlapping duties, Grounds Workers shall not perform System Service Worker classification duties.

#### **G. STRUCTURES WORKER AND BUILDINGS WORKER**

During the 2009 negotiations, the District informed the Union that the District planned to combine the Structures Worker and Building Worker positions into a single job classification. After meeting and negotiating with the Union and considering the Union's interests, the District agreed that a combination of these two classifications will not occur under this agreement. Instead, the District has established a revised Structures Worker class description and a Buildings Worker class description. The revised Structures Worker and the revised Buildings Worker classification descriptions are attached and incorporated into this Agreement as part of Appendix A.. The Union accepts both revised class job descriptions. The District and the Union agree that the revised Structures Worker and the revised Buildings Worker classifications have defined overlapping and interchangeable job duties and that employees must perform all duties in their class description. The interchangeable job duties have been incorporated in the attached class descriptions. As soon as the District provides training the employees must perform all duties in their class description.

#### **H. ELECTRICAL HELPER**

All Electrical Helpers, upon clearing probation, will be given first opportunity to participate in the next Electrical Training Program per Section 17.9 – Training Programs, provided the employee applies for the program and meets the minimum qualifications.

#### **I. TRACK WORKER**

The District has modified the Track Worker classification description to permit Track Workers to cut and remove vegetation from the right of way. The revised classification job description is attached and incorporated into this agreement as part of Appendix A. The Union accepts the classification job description and the MWII pay grade.

### 1\* Minute Clarification

The parties agreed to the following:

#### **Shop Scheduler:**

The Shop Schedulers shall be moved into the MW III Step Progression System with the following provisos:

- 1) Shop Schedulers will not be permitted to fill Foreworker or Inspector vacancies on a temporary basis.
- 2) Temporary Shop Scheduler vacancies will be filled/not filled at the District's discretion utilizing, but not limited to, any of the following options:
  - A) Lateral transfer of Shop Schedulers
  - B) Shop Scheduler overtime
  - C) Upgrade of senior qualified ET or TVM.

#### **Foreworkers within Stores Division:**

In accordance with the Classification Plan, the Foreworker positions within the Stores Division will be reclassified as Foreworker III positions and no longer be part of the SEIU Local 1021 bargaining unit. The duties and responsibilities of the positions will continue as before the reclassification. No other change is associated with this move.

#### **EDS/Shop Trainers:**

Pursuant to SEIU/MOU-031-7, the EDS/Shop Trainers are placed in the Shops-Vehicle pick-unit.

#### **Multiple Discipline Work Projects:**

The District may establish work groups from more than one pick unit to perform projects that require workers from more than one job function. This work group would be formed for a specific project, for a specific duration and under the direction of a single foreworker from one of the pick units involved.

The Foreworker assigned to supervise a multiple work group will be paid five percent (5%) above their current rate of pay from the period of time assigned to a specific project.

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### 28.3 CLASSIFICATION PLAN \*

The Classification Plan (Plan) purpose is to more appropriately describe, classify, allocate, and reallocate District work for more operational effectiveness and efficiency. In order to fully implement the Plan the following procedures shall be followed, which affect employee pay, unit representation, filling of position vacancies, and progression and promotion:

1. **"Red Circling" for Reallocated Employees:** In instances where an employee's work in the then existing classification (old classification) is reallocated by downgrade in accordance with the Plan's new classification structure, then that employee's pay will be "red circled". "Red circled" means that the employee shall continue to be paid at his/her present rate of pay, but will receive future pay increases and benefit applicable to the old classification until such time as he/she vacates the position. When the "red circled" employee vacates his/her position in the old classification for any reason, the vacant position shall be filled within the new classification structure and pay range.
2. **Non-represented Position Transfer to Bargaining Unit Under the Plan (Grandfather Clause):** Under the Plan some previously existing non-represented employee positions have been identified for reallocation to bargaining unit positions as the result of the Plan implementation. In that event, the incumbent non-represented employee shall have the option of remaining non-represented or be transferred and represented by the bargaining unit. The District is responsible for establishing the appropriate procedure for the then non-represented employee to exercise this option/election.

Should the incumbent non-represented employee elect not to be included in the bargaining unit, then the incumbent employee shall remain exempt from Union representation as long as he/she remains in the position which was identified for reallocation to the bargaining unit. However, when that incumbent vacates the position it shall be included in the bargaining unit and the new employee will be represented by the Union.

3. **Pool Posting for District-wide Generic Classification \*:** The District continues its proposal for modifying and expanding use of its pool posting procedure.
4. **"Deep Classification" Progression and Promotion Procedures\*+:** This procedure applies to those classifications specifically enumerated in

minute clarification. Upon the Department Head's written certification that the employee has met both the minimum qualifications of the higher level classification and any "predetermined criteria" established for movement between the various classification levels, the employees in these classifications may progress and be promoted within the classification series from level-to-level.

**\* Minute Clarification**

+ The "Deep Classification" concept refers to the following specific classifications: Junior Applications Programmer Analyst; Applications Programmer Analyst; and Senior Applications Programmer Analyst. Employees within any of these classifications are permitted to perform the "full range" of duties and responsibilities identified for any level of these classifications.

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## **28.4 BASE WAGE SCHEDULE**

A. The base wage schedule will be implemented and administered as follows:

1. Employees will suffer no loss of pay as a result of the pay progression.
2. Entry and training rates are eliminated.
3. The pay progression of 76.5%, 79.5%, 85%, 90%, and 100% (top rate) apply to all base rates of pay. All percentages are based on the top rate. Movement within the pay steps are based on one year intervals, on the date of hire/anniversary date. The pay progression will apply only one time to each such employee.
4. New employees that are hired will be placed at the first year pay progression rate (76.5%) of their classification pursuant to Section 28.4 Base Wage Schedule. New employees will progress through each successive step based on their date of hire/anniversary date with the District.

## **B. SALARY/WAGES FOR 2009-2013**

1. Fiscal Year 2010 (First Year)

Effective August 1, 2009 and continuing until June 30, 2010, the base salary for bargaining unit members shall remain the same as the FY

2008-2009 base rate of pay, with the Section 8.2 COLA included. In other words, the FY 2009-2010 base rate of pay shall not be increased over the 2008-2009 rate of pay, with the Section 8.2 COLA included.

#### 2. Fiscal Year 2011 (Second Year)

Effective July 1, 2010, and continuing until June 30, 2011, the base salary for bargaining unit members shall remain the same as the 2008-2009 base rate of pay, with the Section 8.2 COLA included. In other words, the 2010-2011 base rate of pay shall not be increased over the 2008-2009 rate of pay, with the Section 8.2 COLA included.

No later than July 1, 2010, the District shall pay each bargaining unit member in active paid status on June 1, 2010, a one-time, lump sum payment of five hundred dollars (\$500). The District shall have no obligation to make a similar payment on any future date.

#### 3. Fiscal Year 2012 (Third Year)

Effective July 1, 2011, and continuing until June 30, 2012, the base salary for bargaining unit members shall remain the same as the 2008-2009 base rate of pay, with the Section 8.2 COLA included. In other words, the 2011-2012 base rate of pay shall not be increased over the 2008-2009 rate of pay, with the Section 8.2 COLA included.

No later than July 1, 2011, the District shall pay each bargaining unit member in active paid status on June 1, 2011, a one-time, lump sum payment of one thousand dollars (\$1,000). The District shall have no obligation to make a similar payment on any future date.

#### 4. Fiscal Year 2013 (Fourth Year)

Effective July 1, 2012, and continuing until June 30, 2013, the base salary for bargaining unit members shall remain the same as the 2008-2009 base rate of pay with the Section 8.2 COLA included. In other words, the 2012-2013 base rate of pay shall not be increased over the 2008-2009 rate of pay, with the Section 8.2 COLA included.

No later than July 1, 2012, the District shall pay each bargaining unit member in active paid status on June 1, 2012, a one-time, lump sum payment of one thousand and five hundred dollars (\$1,500). The District shall have no obligation to make a similar payment on any future date.

## 5. Potential One-Percent Schedule Improvement

If all criteria set forth in 6. are met and no extraordinary unplanned expenses as set forth in 7. have occurred, then effective at the end of this Agreement on June 30, 2013, the District shall increase the salary/wage schedule by one percent over the 2008-2009 salary schedule. These calculations shall be made on or before March 31, 2013, and shall be effective on July 1, 2013 (FY14). The calculations for FY13 will be based on the data available on March 31, 2013. All references to FY13 in subsection 6. shall include only the period of July 1, 2012 through March 31, 2013.

## 6. Criteria For Potential Increase To Base Salary/Wage

On or before March 31, 2013, the District shall calculate and apply the following criteria:

### a. Sales Tax Revenue Growth Rates

Determine the FY11, FY12 and FY13 percentage increase in annual sales tax growth over the prior fiscal year. To meet this criterion, the 3- year average annual increase in sales tax growth for FY11, FY12, and FY13 must be 5.0% or more growth in sales tax revenue funded and received.

### b. Ridership Growth Rates

Determine the FY11, FY12, and FY13 percentage increase in annual ridership growth over the prior fiscal year ridership. To meet this criterion, the 3-year average annual increase in ridership growth for FY11, FY12, and FY13 must be 4.7% or more growth.

### c. Specific Increased Expenses

Determine whether the following specific District expenses have increased on an annual basis greater than stated:

- District's Employer PERS miscellaneous pension contributions increased by an average of more than 10.5% per year over FY11, FY 12, and FY13; or
- District contributions toward medical insurance premiums required by Section 5.2B of this Agreement increased by an average of more than 10% annually during FY 11, FY12, and FY13.

If either of the average annual increases listed above in this Subsection 6.c. are exceeded, then the criterion for 6.c. has not been met.

#### 7. Extraordinary, Unplanned Expenses

On or before March 31, 2013, the District shall determine whether an extraordinary, unbudgeted, and unanticipated expense exceeding 2.5% of the District's adopted operating budget has occurred during fiscal years FY10, FY11, FY12, or FY13, other than those specified in 6.c. above. In the event that such an extraordinary, unbudgeted and unanticipated expense outside the control of the District has occurred during FY10, FY11, FY12, or FY13, the District shall have no obligation to increase the salary/wage schedule by one percent (1.0%) as specified above.

#### 8. All Conditions Must Be Met

The District shall have no obligation to increase the salary/wage schedule by one percent (1.0%) effective on July 1, 2013 or at any time in the future unless all the conditions set forth in Subsection 6. are met, and the conditions set forth in Subsection 7. do not occur.

#### 9. One-Time, Non-Precedent Setting Increase/Definition Of Status Quo

The salary increase described in this section is provided on a one-time, non-precedent setting basis that does not constitute a past practice. And, during negotiations for any successor agreement, the salary/wage criteria described in this section shall not define the status quo for salary/wage increases. During the negotiations for a succeeding term after June 30, 2013, the District shall not assert that the 1.0% conversion is included as part of any increased wage offer made by the District for the succeeding contract.

**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Maintenance	Grade Description	Step	Hourly Rates				
			7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
	Utility Worker 1st Year	76	18.9423	18.9423	18.9423	18.9423	+ .4 COLA
	Utility Worker 2nd Year	79	19.6852	19.6852	19.6852	19.6852	+ .4 COLA
	Utility Worker 3rd Year	85	21.0471	21.0471	21.0471	21.0471	+ .4 COLA
	Utility Worker 4th Year	90	22.2851	22.2851	22.2851	22.2851	+ .4 COLA
	Utility Worker 5th Year	99	24.7613	24.7613	24.7613	24.7613	+ .4 COLA
	PT Utility Worker	2	20.8609	20.8609	20.8609	20.8609	+ .4 COLA
	System Service 1st Year	76	18.9423	18.9423	18.9423	18.9423	+ .4 COLA
	System Service 2nd Year	79	19.6852	19.6852	19.6852	19.6852	+ .4 COLA
	System Service 3rd Year	85	21.0471	21.0471	21.0471	21.0471	+ .4 COLA
	System Service 4th Year	90	22.2851	22.2851	22.2851	22.2851	+ .4 COLA
	System Service 5th Year	99	24.7613	24.7613	24.7613	24.7613	+ .4 COLA
	PT System Service	2	20.8609	20.8609	20.8609	20.8609	+ .4 COLA
	Maintenance Worker I System Service 1st Year	76	20.2952	20.2952	20.2952	20.2952	+ .4 COLA
	Maintenance Worker I System Service 2nd Year	79	21.0911	21.0911	21.0911	21.0911	+ .4 COLA
	Maintenance Worker I System Service 3rd Year	85	22.5503	22.5503	22.5503	22.5503	+ .4 COLA
	Maintenance Worker I System Service 4th Year	90	23.8768	23.8768	23.8768	23.8768	+ .4 COLA
	Maintenance Worker I System Service 5th Year	99	26.5298	26.5298	26.5298	26.5298	+ .4 COLA
	Maintenance Worker I 1st Year	76	20.4792	20.4792	20.4792	20.4792	+ .4 COLA
	Maintenance Worker I 2nd Year	79	21.2823	21.2823	21.2823	21.2823	+ .4 COLA
	Maintenance Worker I 3rd Year	85	22.7547	22.7547	22.7547	22.7547	+ .4 COLA
	Maintenance Worker I 4th Year	90	24.0932	24.0932	24.0932	24.0932	+ .4 COLA
	Maintenance Worker I 5th Year	99	26.7703	26.7703	26.7703	26.7703	+ .4 COLA
	PT Maintenance Worker I	1	22.5515	22.5515	22.5515	22.5515	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Grade Description	Step	Hourly Rates				
		7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Maintenance Worker II 1st Year	76	23.1191	23.1191	23.1191	23.1191	+ .4 COLA
Maintenance Worker II 2nd Year	79	24.0257	24.0257	24.0257	24.0257	+ .4 COLA
Maintenance Worker II 3rd year	85	25.6879	25.6879	25.6879	25.6879	+ .4 COLA
Maintenance Worker II 4th Year	90	27.1989	27.1989	27.1989	27.1989	+ .4 COLA
Maintenance Worker II 5th Year	99	30.2211	30.2211	30.2211	30.2211	+ .4 COLA
PT Maintenance Worker II	1	25.4554	25.4554	25.4554	25.4554	+ .4 COLA
Maintenance Worker III 1st Year	76	27.2414	27.2414	27.2414	27.2414	+ .4 COLA
Maintenance Worker III 2nd Year	79	28.3097	28.3097	28.3097	28.3097	+ .4 COLA
Maintenance Worker III 3rd Year	85	30.2683	30.2683	30.2683	30.2683	+ .4 COLA
Maintenance Worker III 4th Year	90	32.0488	32.0488	32.0488	32.0488	+ .4 COLA
Maintenance Worker III 5th Year	99	35.6098	35.6098	35.6098	35.6098	+ .4 COLA
Sr Storekeeper 1st Year	76	25.2558	25.2558	25.2558	25.2558	+ .4 COLA
Sr Storekeeper 2nd Year	79	26.2462	26.2462	26.2462	26.2462	+ .4 COLA
Sr Storekeeper 3rd Year	85	28.0620	28.0620	28.0620	28.0620	+ .4 COLA
Sr Storekeeper 4th Year	90	29.7127	29.7127	29.7127	29.7127	+ .4 COLA
Sr Storekeeper 5th Year	99	33.0142	33.0142	33.0142	33.0142	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
 Effective 7/1/2009 - 6/30/2013

Maintenance	Step	Hourly Rates				
		7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Grade Description						
Computer Specialist 1st Year	76	27.2414	27.2414	27.2414	27.2414	+ .4 COLA
Computer Specialist 2nd Year	79	28.3097	28.3097	28.3097	28.3097	+ .4 COLA
Computer Specialist 3rd Year	85	30.2683	30.2683	30.2683	30.2683	+ .4 COLA
Computer Specialist 4th Year	90	32.0488	32.0488	32.0488	32.0488	+ .4 COLA
Computer Specialist 5th Year	99	35.6098	35.6098	35.6098	35.6098	+ .4 COLA
Inspector 1st Year	76	28.4837	28.4837	28.4837	28.4837	+ .4 COLA
Inspector 2nd Year	79	29.6007	29.6007	29.6007	29.6007	+ .4 COLA
Inspector 3rd Year	85	31.6485	31.6485	31.6485	31.6485	+ .4 COLA
Inspector 4th Year	90	33.5102	33.5102	33.5102	33.5102	+ .4 COLA
Inspector 5th Year	99	37.2336	37.2336	37.2336	37.2336	+ .4 COLA
Quality Team Leader 1st Year	76	28.6035	28.6035	28.6035	28.6035	+ .4 COLA
Quality Team Leader 2nd Year	79	29.7252	29.7252	29.7252	29.7252	+ .4 COLA
Quality Team Leader 3rd Year	85	31.7816	31.7816	31.7816	31.7816	+ .4 COLA
Quality Team Leader 4th Year	90	33.6511	33.6511	33.6511	33.6511	+ .4 COLA
Quality Team Leader 5th Year	99	37.3902	37.3902	37.3902	37.3902	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Cash Handler	Grade Description	Step	Hourly Rates				
			7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Cash Handler	Cash Handler 1st Year	76	19.9392	19.9392	19.9392	19.9392	+ .4 COLA
	Cash Handler 2nd Year	79	20.7211	20.7211	20.7211	20.7211	+ .4 COLA
	Cash Handler 3rd Year	85	22.1547	22.1547	22.1547	22.1547	+ .4 COLA
	Cash Handler 4th Year	90	23.4579	23.4579	23.4579	23.4579	+ .4 COLA
	Cash Handler 5th Year	99	26.0644	26.0644	26.0644	26.0644	+ .4 COLA
Senior Cash Handler	Senior Cash Handler 1st Year	76	21.3148	21.3148	21.3148	21.3148	+ .4 COLA
	Senior Cash Handler 2nd Year	79	22.1506	22.1506	22.1506	22.1506	+ .4 COLA
	Senior Cash Handler 3rd Year	85	23.6831	23.6831	23.6831	23.6831	+ .4 COLA
	Senior Cash Handler 4th Year	90	25.0762	25.0762	25.0762	25.0762	+ .4 COLA
	Senior Cash Handler 5th Year	99	27.8625	27.8625	27.8625	27.8625	+ .4 COLA
<b>Maintenance Subunit- Forepersons</b>							
Cash Handler Foreperson	Cash Handler Foreperson 1st Year	76	29.9538	29.9538	29.9538	29.9538	+ .4 COLA
	Cash Handler Foreperson 2nd Year	79	31.1284	31.1284	31.1284	31.1284	+ .4 COLA
	Cash Handler Foreperson 3rd Year	85	33.2820	33.2820	33.2820	33.2820	+ .4 COLA
	Cash Handler Foreperson 4th Year	90	35.2397	35.2397	35.2397	35.2397	+ .4 COLA
	Cash Handler Foreperson 5th Year	99	39.1553	39.1553	39.1553	39.1553	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Maintenance Subunit- Forepersons	Step	Hourly Rates				
		7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
FP Maintenance 1st Year	76	29.9538	29.9538	29.9538	29.9538	+ .4 COLA
FP Maintenance 2nd Year	79	31.1284	31.1284	31.1284	31.1284	+ .4 COLA
FP Maintenance 3rd Year	85	33.2820	33.2820	33.2820	33.2820	+ .4 COLA
FP Maintenance 4th Year	90	35.2397	35.2397	35.2397	35.2397	+ .4 COLA
FP Maintenance 5th Year	99	39.1553	39.1553	39.1553	39.1553	+ .4 COLA
FP System Service/Utility Worker 1st Year	76	27.7041	27.7041	27.7041	27.7041	+ .4 COLA
FP System Service/Utility Worker 2nd Year	79	28.7906	28.7906	28.7906	28.7906	+ .4 COLA
FP System Service/Utility Worker 3rd Year	85	30.7824	30.7824	30.7824	30.7824	+ .4 COLA
FP System Service/Utility Worker 4th Year	90	32.5931	32.5931	32.5931	32.5931	+ .4 COLA
FP System Service/Utility Worker 5th Year	99	36.2146	36.2146	36.2146	36.2146	+ .4 COLA
FP Rolling Stock 1st Year	76	32.0362	32.0362	32.0362	32.0362	+ .4 COLA
FP Rolling Stock 2nd Year	79	33.2925	33.2925	33.2925	33.2925	+ .4 COLA
FP Rolling Stock 3rd year	85	35.5957	35.5957	35.5957	35.5957	+ .4 COLA
FP Rolling Stock 4th Year	90	37.6896	37.6896	37.6896	37.6896	+ .4 COLA
FP Rolling Stock 5th Year	99	41.8774	41.8774	41.8774	41.8774	+ .4 COLA



**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Grade Description	Step	Hourly Rates				
		7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Engineering Aide I 1st Year	76	21.7213	21.7213	21.7213	21.7213	+ .4 COLA
Engineering Aide I 2nd Year	79	22.5731	22.5731	22.5731	22.5731	+ .4 COLA
Engineering Aide I 3rd Year	85	24.1348	24.1348	24.1348	24.1348	+ .4 COLA
Engineering Aide I 4th Year	90	25.5545	25.5545	25.5545	25.5545	+ .4 COLA
Engineering Aide I 5th Year	99	28.3939	28.3939	28.3939	28.3939	+ .4 COLA
Engineering Aide II 1st Year	76	23.7141	23.7141	23.7141	23.7141	+ .4 COLA
Engineering Aide II 2nd Year	79	24.6441	24.6441	24.6441	24.6441	+ .4 COLA
Engineering Aide II 3rd Year	85	26.3490	26.3490	26.3490	26.3490	+ .4 COLA
Engineering Aide II 4th Year	90	27.8990	27.8990	27.8990	27.8990	+ .4 COLA
Engineering Aide II 5th Year	99	30.9989	30.9989	30.9989	30.9989	+ .4 COLA
Engineering Aide III 1st Year	76	25.3569	25.3569	25.3569	25.3569	+ .4 COLA
Engineering Aide III 2nd Year	79	26.3513	26.3513	26.3513	26.3513	+ .4 COLA
Engineering Aide III 3rd Year	85	28.1744	28.1744	28.1744	28.1744	+ .4 COLA
Engineering Aide III 4th Year	90	29.8317	29.8317	29.8317	29.8317	+ .4 COLA
Engineering Aide III 5th Year	99	33.1464	33.1464	33.1464	33.1464	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Grade Description	Step	Hourly Rates				
		7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Clerk II 1st Year	76	16.8514	16.8514	16.8514	16.8514	+ .4 COLA
Clerk II 2nd Year	79	17.5123	17.5123	17.5123	17.5123	+ .4 COLA
Clerk II 3rd Year	85	18.7238	18.7238	18.7238	18.7238	+ .4 COLA
Clerk II 4th Year	90	19.8252	19.8252	19.8252	19.8252	+ .4 COLA
Clerk II 5th Year	99	22.0281	22.0281	22.0281	22.0281	+ .4 COLA
Clerk III 1st Year	76	19.3218	19.3218	19.3218	19.3218	+ .4 COLA
Clerk III 2nd Year	79	20.0795	20.0795	20.0795	20.0795	+ .4 COLA
Clerk III 3rd Year	85	21.4687	21.4687	21.4687	21.4687	+ .4 COLA
Clerk III 4th Year	90	22.7315	22.7315	22.7315	22.7315	+ .4 COLA
Clerk III 5th Year	99	25.2573	25.2573	25.2573	25.2573	+ .4 COLA
Clerk IV 1st Year	76	21.6159	21.6159	21.6159	21.6159	+ .4 COLA
Clerk IV 2nd Year	79	22.4635	22.4635	22.4635	22.4635	+ .4 COLA
Clerk IV 3rd Year	85	24.0176	24.0176	24.0176	24.0176	+ .4 COLA
Clerk IV 4th Year	90	25.4304	25.4304	25.4304	25.4304	+ .4 COLA
Clerk IV 5th Year	99	28.2561	28.2561	28.2561	28.2561	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Grade Description	Step	Hourly Rates				
		7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Secretary II 1st Year	76	20.2657	20.2657	20.2657	20.2657	+ .4 COLA
Secretary II 2nd Year	79	21.0605	21.0605	21.0605	21.0605	+ .4 COLA
Secretary II 3rd Year	85	22.5175	22.5175	22.5175	22.5175	+ .4 COLA
Secretary II 4th Year	90	23.8420	23.8420	23.8420	23.8420	+ .4 COLA
Secretary II 5th Year	99	26.4912	26.4912	26.4912	26.4912	+ .4 COLA
Secretary III 1st Year	76	21.8098	21.8098	21.8098	21.8098	+ .4 COLA
Secretary III 2nd Year	79	22.6651	22.6651	22.6651	22.6651	+ .4 COLA
Secretary III 3rd Year	85	24.2331	24.2331	24.2331	24.2331	+ .4 COLA
Secretary III 4th Year	90	25.6586	25.6586	25.6586	25.6586	+ .4 COLA
Secretary III 5th Year	99	28.5096	28.5096	28.5096	28.5096	+ .4 COLA
Office Technician 1st Year	76	22.6638	22.6638	22.6638	22.6638	+ .4 COLA
Office Technician 2nd Year	79	23.5525	23.5525	23.5525	23.5525	+ .4 COLA
Office Technician 3rd Year	85	25.1820	25.1820	25.1820	25.1820	+ .4 COLA
Office Technician 4th Year	90	26.6633	26.6633	26.6633	26.6633	+ .4 COLA
Office Technician 5th Year	99	29.6259	29.6259	29.6259	29.6259	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
 Effective 7/1/2009 - 6/30/2013

Clerical-Subunit-Forepersons		Hourly Rates					
		Step	7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Grade Description							
Clerical Foreperson   1st Year	76	25.2558	25.2558	25.2558	25.2558	+ .4 COLA	
Clerical Foreperson   2nd Year	79	26.2462	26.2462	26.2462	26.2462	+ .4 COLA	
Clerical Foreperson   3rd Year	85	28.0620	28.0620	28.0620	28.0620	+ .4 COLA	
Clerical Foreperson   4th Year	90	29.7127	29.7127	29.7127	29.7127	+ .4 COLA	
Clerical Foreperson   5th Year	99	33.0142	33.0142	33.0142	33.0142	+ .4 COLA	

**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Grade Description	Step	Monthly Rates				
		7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Employee Development Specialist	1	5647.73	5647.73	5647.73	5647.73	+ .4 COLA
Employee Development Specialist	2	5869.21	5869.21	5869.21	5869.21	+ .4 COLA
Employee Development Specialist	3	6275.25	6275.25	6275.25	6275.25	+ .4 COLA
Employee Development Specialist	4	6644.39	6644.39	6644.39	6644.39	+ .4 COLA
Employee Development Specialist	5	7382.65	7382.65	7382.65	7382.65	+ .4 COLA
Professional Grade 1	1	3364.81	3364.81	3364.81	3364.81	+ .4 COLA
Professional Grade 1	2	3496.77	3496.77	3496.77	3496.77	+ .4 COLA
Professional Grade 1	3	3738.68	3738.68	3738.68	3738.68	+ .4 COLA
Professional Grade 1	4	3958.61	3958.61	3958.61	3958.61	+ .4 COLA
Professional Grade 1	5	4398.45	4398.45	4398.45	4398.45	+ .4 COLA
Professional Grade 2	1	3532.04	3532.04	3532.04	3532.04	+ .4 COLA
Professional Grade 2	2	3670.55	3670.55	3670.55	3670.55	+ .4 COLA
Professional Grade 2	3	3924.49	3924.49	3924.49	3924.49	+ .4 COLA
Professional Grade 2	4	4155.35	4155.35	4155.35	4155.35	+ .4 COLA
Professional Grade 2	5	4617.05	4617.05	4617.05	4617.05	+ .4 COLA
Professional Grade 3	1	3707.63	3707.63	3707.63	3707.63	+ .4 COLA
Professional Grade 3	2	3853.03	3853.03	3853.03	3853.03	+ .4 COLA
Professional Grade 3	3	4119.59	4119.59	4119.59	4119.59	+ .4 COLA
Professional Grade 3	4	4361.92	4361.92	4361.92	4361.92	+ .4 COLA
Professional Grade 3	5	4846.58	4846.58	4846.58	4846.58	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Grade Description	Step	Monthly Rates				
		7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Professional Grade 4	1	3891.99	3891.99	3891.99	3891.99	+ .4 COLA
Professional Grade 4	2	4044.62	4044.62	4044.62	4044.62	+ .4 COLA
Professional Grade 4	3	4324.43	4324.43	4324.43	4324.43	+ .4 COLA
Professional Grade 4	4	4578.81	4578.81	4578.81	4578.81	+ .4 COLA
Professional Grade 4	5	5084.57	5084.57	5084.57	5084.57	+ .4 COLA
Professional Grade 5	1	4085.57	4085.57	4085.57	4085.57	+ .4 COLA
Professional Grade 5	2	4245.79	4245.79	4245.79	4245.79	+ .4 COLA
Professional Grade 5	3	4539.53	4539.53	4539.53	4539.53	+ .4 COLA
Professional Grade 5	4	4806.56	4806.56	4806.56	4806.56	+ .4 COLA
Professional Grade 5	5	5340.62	5340.62	5340.62	5340.62	+ .4 COLA
Professional Grade 6	1	4288.84	4288.84	4288.84	4288.84	+ .4 COLA
Professional Grade 6	2	4457.03	4457.03	4457.03	4457.03	+ .4 COLA
Professional Grade 6	3	4765.38	4765.38	4765.38	4765.38	+ .4 COLA
Professional Grade 6	4	5045.70	5045.70	5045.70	5045.70	+ .4 COLA
Professional Grade 6	5	5606.33	5606.33	5606.33	5606.33	+ .4 COLA
Professional Grade 7	1	4502.26	4502.26	4502.26	4502.26	+ .4 COLA
Professional Grade 7	2	4678.82	4678.82	4678.82	4678.82	+ .4 COLA
Professional Grade 7	3	5002.51	5002.51	5002.51	5002.51	+ .4 COLA
Professional Grade 7	4	5296.78	5296.78	5296.78	5296.78	+ .4 COLA
Professional Grade 7	5	5885.31	5885.31	5885.31	5885.31	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
 Effective 7/1/2009 - 6/30/2013

Grade Description	Step	Monthly Rates				
		7/1/2009	7/1/2010	7/1/2011	7/1/2012	6/30/2013
Professional Grade 8	1	4726.36	4726.36	4726.36	4726.36	+ .4 COLA
Professional Grade 8	2	4911.71	4911.71	4911.71	4911.71	+ .4 COLA
Professional Grade 8	3	5251.51	5251.51	5251.51	5251.51	+ .4 COLA
Professional Grade 8	4	5560.43	5560.43	5560.43	5560.43	+ .4 COLA
Professional Grade 8	5	6178.25	6178.25	6178.25	6178.25	+ .4 COLA
Professional Grade 9	1	4961.66	4961.66	4961.66	4961.66	+ .4 COLA
Professional Grade 9	2	5156.23	5156.23	5156.23	5156.23	+ .4 COLA
Professional Grade 9	3	5512.96	5512.96	5512.96	5512.96	+ .4 COLA
Professional Grade 9	4	5837.25	5837.25	5837.25	5837.25	+ .4 COLA
Professional Grade 9	5	6485.83	6485.83	6485.83	6485.83	+ .4 COLA
Professional Grade 10	1	5208.72	5208.72	5208.72	5208.72	+ .4 COLA
Professional Grade 10	2	5412.99	5412.99	5412.99	5412.99	+ .4 COLA
Professional Grade 10	3	5787.47	5787.47	5787.47	5787.47	+ .4 COLA
Professional Grade 10	4	6127.91	6127.91	6127.91	6127.91	+ .4 COLA
Professional Grade 10	5	6808.79	6808.79	6808.79	6808.79	+ .4 COLA
Professional Grade 11	1	5468.15	5468.15	5468.15	5468.15	+ .4 COLA
Professional Grade 11	2	5682.59	5682.59	5682.59	5682.59	+ .4 COLA
Professional Grade 11	3	6075.72	6075.72	6075.72	6075.72	+ .4 COLA
Professional Grade 11	4	6433.12	6433.12	6433.12	6433.12	+ .4 COLA
Professional Grade 11	5	7147.91	7147.91	7147.91	7147.91	+ .4 COLA

**28.4 BASE WAGE SCHEDULE**  
Effective 7/1/2009 - 6/30/2013

Grade Description	Step	Monthly Rates					6/30/2013
		7/1/2009	7/1/2010	7/1/2011	7/1/2012		
Professional Grade 12	1	5740.54	5740.54	5740.54	5740.54	+ .4 COLA	
Professional Grade 12	2	5965.66	5965.66	5965.66	5965.66	+ .4 COLA	
Professional Grade 12	3	6378.37	6378.37	6378.37	6378.37	+ .4 COLA	
Professional Grade 12	4	6753.57	6753.57	6753.57	6753.57	+ .4 COLA	
Professional Grade 12	5	7503.97	7503.97	7503.97	7503.97	+ .4 COLA	
Professional Grade 13	1	6026.56	6026.56	6026.56	6026.56	+ .4 COLA	
Professional Grade 13	2	6262.89	6262.89	6262.89	6262.89	+ .4 COLA	
Professional Grade 13	3	6696.17	6696.17	6696.17	6696.17	+ .4 COLA	
Professional Grade 13	4	7090.07	7090.07	7090.07	7090.07	+ .4 COLA	
Professional Grade 13	5	7877.85	7877.85	7877.85	7877.85	+ .4 COLA	
Professional Grade 14	1	6326.86	6326.86	6326.86	6326.86	+ .4 COLA	
Professional Grade 14	2	6574.98	6574.98	6574.98	6574.98	+ .4 COLA	
Professional Grade 14	3	7029.85	7029.85	7029.85	7029.85	+ .4 COLA	
Professional Grade 14	4	7443.37	7443.37	7443.37	7443.37	+ .4 COLA	
Professional Grade 14	5	8270.41	8270.41	8270.41	8270.41	+ .4 COLA	
Professional Grade 15	1	6642.19	6642.19	6642.19	6642.19	+ .4 COLA	
Professional Grade 15	2	6902.67	6902.67	6902.67	6902.67	+ .4 COLA	
Professional Grade 15	3	7029.85	7380.21	7380.21	7380.21	+ .4 COLA	
Professional Grade 15	4	7814.34	7814.34	7814.34	7814.34	+ .4 COLA	
Professional Grade 15	5	8682.60	8682.60	8682.60	8682.60	+ .4 COLA	

## 28.5 BUSINESS ADVANCEMENT PLAN – “BAP” - (UPDATE OF ELECTRONIC DATA MANAGEMENT SYSTEMS)

**A. Evaluation of Reorganization Proposals:** The District may initiate reorganizations related to the BAP (phases I and II) that would involve a redistribution of duties between classifications within the bargaining unit. The District shall send notice of such action and the tentatively assigned wage rate for modified classifications to the union no less than thirty (30) days before the proposed implementation date. In determining whether to initiate such a reorganization of duties, the District shall consider:

1. whether the change would directly or indirectly increase productivity, efficiency or the quality of service;
2. the impact on employee working conditions, safety and available mitigation measures; and
3. other relevant considerations identified by the union.

The union may object to such reorganization or to the wage rate proposed by the District or both within the thirty (30) day notice period but shall specify its position on each matter in its notice. If the Union submits written notice of its objections to the District, the parties shall meet within fifteen (15) days thereafter in an effort to reach agreement on the changes in affected classification descriptions and the applicable wage rates. If they reach agreement, the reorganization may proceed. If they do not, the disputed matter shall be submitted to expedited arbitration as set forth below.

### **B. Expedited Arbitration**

1. The parties agree that the following three (3) arbitrators shall hear and resolve disputes arising under subsection A above: William Riker, David Nevins, and Alexander Cohn.
2. Hearings pursuant to subsection A above shall be scheduled on a bi-quarterly basis, with bi-quarterly dates selected a year into the future. Each arbitrator on the panel will hear and decide all the disputes on a given quarterly date, with the dates rotating between the above panel members. The parties may agree on substitutions within the rotation. The arbitrator will issue a bench decision within three (3) days of the close of the hearing. Unless otherwise ordered by the arbitrator, no court reporter will be required and no briefs will be filed. Argument may be limited at

the discretion of the arbitrator. The parties shall equally share the arbitrator's fees and expenses.

3. The arbitrator will consider the following in determining whether the reorganization proposed by the District should go forward:
  - a. Whether the proposed job description revisions increase efficiency, productivity, or the quality of service;
  - b. Whether the proposed revision(s) violates the non-discrimination provision of this agreement;
  - c. Whether the proposed revision adequately addresses any adverse impact of the proposed changes on employee health and safety; and,
  - d. Any other relevant information the parties bring forward.
4. In disputes over the appropriate wage rate for the revised classification, the arbitrator shall base his or her decision on rates paid in the relevant labor market for comparable jobs, internal comparisons, the financial condition of the District, and other relevant compensation factors brought forth by the parties.
5. The process described herein shall not apply to any changes in job descriptions outside the scope of the BAP I or II.

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## **29.0 SIDE LETTERS AND MEMORANDA OF UNDERSTANDING (MOU'S)**

Two hundred (200) copies of each side letter agreed to within the life of the Agreement shall be provided by the District to the Union for attachment to each copy of the Agreement. The District will provide a copy of such side letter(s) to all current employees within two (2) weeks of receipt of printed copies, but, in any event, no later than sixty (60) days from the signing of such side letter. Such side letter(s) shall be printed by an Allied printing establishment.

The side letters shall be provided on 5" x 8" paper.

All memoranda of understandings, side letters of agreement or any other agreement existing prior to ratification of this Agreement, unless mutually extended, are null and void.

**Side Letters:** The following Side Letters shall continue in effect during the term of this Agreement:

<b>Date</b>	<b>Control Number</b>	<b>Subject</b>
6/25/74	SEIU/SL-1-3	System-wide Foreworker job description
01/05/81	GEN-4-4 (including related 9/30/80 and 10/22/80 letters)	Deferred Compensation Plan and Qualified Money Purchase Pension Plan (signatory by ATU 1555, SEIU 790, BARTSPA and BPOA)
11/6/81	GEN-4-3(A)	Implementation of the transfer of 1.627% from PERS to the Money Purchase Pension Plan (signatory by ATU 1555, SEIU 790, BARTSPA and BPOA)
6/6/88	SEIU/SL6-2	Budget Analyst Overtime Exemption
12/31/90	SEIU/SL-6-3	New UPE 790 Pay Plan for Professional Employees
10/17/94	ATU/SL-8-9	Transportation and System Service Department
3/6/96	GEN-4-5	Donation of Vacation & Floating Holidays
3/8/99	SEIU-1-9	CAD Drafters
7/12/00	SEIU/SL 6-7	Flexible Spending Account
9/09/04	SEIU/SL-7-5	Selection of work crews for shop-specific projects in RS&S
8/16/09	SEIU/SL-10-1	Retiree Medical Eligibility and Cost Savings

**MOU's:** The following Memoranda of Understandings (MOU's) shall continue in effect during the term of this Agreement:

<b>Date</b>	<b>Control Number</b>	<b>Subject</b>
2/18/77	SEIU/MOU 002-4	Super Seniority
7/1/82	SEIU/MOU 007-4	4-10 Work Week Plan (see 047-8)
7/1/82	SEIU/MOU 022-6	4-10 Work Week
3/31/83 (revised 6/30/94)	SEIU/MOU 011-4	Trouble Desk Relief Shift – RS&S
1/31/85	SEIU/MOU 014-4	Rolling Stock Foreworker Meal Periods
5/10/90	SEIU/MOU 028-6	Clerical Staff Overtime Procedure – Transit Information Center

<b>Date</b>	<b>Control Number</b>	<b>Subject</b>
6/26/91	SEIU/MOU 031-7	EDS/Shop Trainers
04/22/93	SEIU/MOU 033-7	System Service Issues
08/26/93	SEIU/MOU 034-7	Building Foreworker Classification
06/14/94 (Revised)	SEIU/MOU 027-6	Clerical Staff Overtime Procedure – Rolling Stock & Shops
5/23/95	SEIU/MOU 040-8	Class A Driver's License in Track & structure
6/15/95	GEN/MOU 95-01	Random Substance Abuse Testing Representation
12/12/95	SEIU/MOU 044-8	Resolution of Service Workers Upgrade to Foreworker II Position(s)
1/18/96	SEIU/MOU 049-8 (Previously 043- 8)	Foreworker Evaluation Committee
3/12/97	SEIU/MOU 047-8	Modification to Memorandum of Understanding 007-4
7/1/97	GEN MOU 8-1	Flexible Spending Account
9/4/02	SEIU MOU 062-1	Layoff process
11/15/02	SEIU MOU 063-3	Hayward Backshop Probationary Period Reversion
4/2/03	SEIU/MOU 062-2	Laid-off employees; Elevator and escalator training

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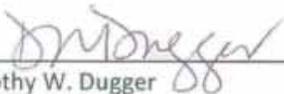
## 29.1 DEFINITIONS

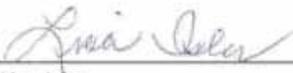
- A. Side Letter: A binding agreement which changes existing contract language or adds or deletes language from the contract. Side Letters require ratification by the District's Board of Directors and the membership of the Union.
- B. Memorandum of Understanding (MOU): A binding agreement which clarifies existing contract language or sets forth procedures which implement contract language. MOU's do not require ratification by the District's Board of Directors or the membership of the Union.
-

IN WITNESS WHEREOF THE parties hereto have caused their names to be subscribed by their duly authorized officers and representatives on April 14, 2010.

**FOR THE DISTRICT:**

**FOR THE UNION:**

By:   
Dorothy W. Dugger  
General Manager

By:   
Lisa Isler  
President, BART Chapter

**NEGOTIATED:**

By:   
M. Carol Stevens  
Chief District Negotiator

By:   
Deslar Patten  
President, BART Professional Chapter

By:   
Teresa Murphy  
Assistant General Manager  
Administration

**District Negotiations Team:**

**Union Negotiating Committee:**

M. Carol Stevens  
Teresa Murphy  
Maria Robinson  
Joel Koford  
Richard Leonard  
David Hardt  
Wilbur Wong  
Vicki Nuetzel  
Lawrence Zeigler  
Randall Roderick  
Kevin Alexander  
Hamed Tafaghodi  
Prem Bajaj  
Robert Umbreit  
Joe Evinger

Larry Gerber  
Lisa Isler  
Suzanne Angeli  
John Maher  
Harry Gordon  
Joe Bomberger  
Frank Cain  
Roscoe Daniels  
Keith Davis  
Shannon Duke  
Dennis (Howard) Jones  
Cass McCoy  
James Riddle  
Andrew Shaifer  
Eugene Texiera  
Manuel Vega  
Deslar Patten



**Bay Area Rapid Transit District**

**And**

**Service Employees  
International Union, Local 1021**

**Labor Agreement**

**July 1, 2009 – June 30, 2013**

**Addendum**

June 25, 1974

## **SIDE LETTER OF AGREEMENT: UPE-1-3**

### **SYSTEM FOREWORKER JOB DESCRIPTION**

#### **Scope**

A Line Supervisor representing District Management who has the authority to direct the activities of Maintenance employees. Has the responsibility to recommend employment promotion, and discipline. Has the direct responsibility to see that assigned work is performed and maintenance schedules and goals are met. Administers District policy on the operating level and is responsible to assure that such administration is carried out in a safe and efficient manner. Acts as an intermediary between Systems Maintenance Employees and higher levels of Systems Maintenance Management.

#### **Typical Duties**

1. Provides specific instruction and direction to maintenance crew personnel.
2. Maintains sound management-employee relations with personnel under his/her supervision, including proper administration of discipline, effective communication, and safety standards.
3. Assist with evaluation of job performances.
4. Reviews and develops recommendations for improvement in work methods and processes used in his/her area of responsibility.
5. Requisitions necessary supplies, tools and equipment; responsible for assisting budget control of his/her cost centers; coordinates work with other departments, divisions and sections or with outside contractors' representatives as required.
6. Provides for additional crews and material when corrective action is needed beyond the capacity of assigned crew.
7. Insures that all equipment and inventories under his/her control are protected and maintained in safe operating condition.
8. Provides technical instruction as needed and insures work is performed in a safe and efficient manner.

#### **Minimum Qualifications**

1. Must have functioned in a supervisory or leadman capacity for a minimum of six (6) months or must have completed a supervisory course at some accredited institution or its equivalent.

2. Must be a high school graduate or equivalent and have the ability to read, write and communicate the English language, understand and carry out verbal or written instructions.
3. Must possess knowledge and be familiar with District Safety Rules, Standard Plans, Specifications, Rules, Regulations and Operations Procedures to insure work is performed in compliance with District and System Maintenance Department.
4. Must possess knowledge in the specific classification within a Pick Unit and shall be required to supervise and direct all phases of maintenance operations within the area of his/her responsibility.
5. Leadership and organizational ability is an essential prerequisite for this position.
6. Must possess a valid California Motor Vehicle Operator's License.
7. Must be able to successfully pass a Physical Examination as required by the District.
8. Operate District's radio and telephone communication systems in compliance with District Rules, Regulations and Procedures.
9. Must have a good attendance and work record.

January 5, 1981

**SIDE LETTER OF AGREEMENT: GEN-4-4**

BART Police Officers Association  
Local 1008, SEIU  
800 Madison Street  
Oakland, California 94607

BART Supervisory and Professional Association  
800 Madison Street  
Oakland, California 94607

United Public Employees Local 790  
522 Grand Avenue  
Oakland, California 94610

Amalgamated Transit Union Local 1555  
1440 Broadway Street, Suite 501  
Oakland, California 94612

Re: Deferred Compensation Plan and Qualified Money Purchase  
Pension Plan

Gentlemen:

When signed below by all parties, this letter will constitute a Side Letter of Agreement between the parties regarding the above-mentioned subject.

The parties agree that with the exception of changes which are necessary or desirable to obtain or maintain the qualified status of the plans, the District shall not change, amend, terminate, alter or modify the written plan documents governing the implementation and administration of the District's Deferred Compensation Plan and Qualified Money Purchase Pension Plan adopted by the District's Board of Directors on December 18, 1980, insofar as such action would affect employees represented by United Public Employees Local 790, Amalgamated Transit Union Local 1555, BART Police Officers Association or BART Supervisory and Professional Association without the written mutual agreement of all parties signatory to this Side Letter of Agreement.

The parties further agree that the understandings contained in the letter dated September 30, 1980 from Paul Varacalli to Larry Williams together with the letter dated October 22, 1980 from Larry Williams to Paul

Varacalli, copies of which are attached hereto, are made part of this agreement and by this reference incorporated herein.

The understandings and agreements contained in this Side Letter are to be considered a part of the consideration given for the establishment of the Deferred Compensation Plan and Qualified Money Purchase Pension Plan.

This Side Letter of Agreement shall continue in full force and effect from the date of execution until modified or terminated by the written mutual agreement of all parties to this agreement.

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Keith Bernard  
San Francisco Bay Area Rapid Transit  
District

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Gene Nixon  
BART Supervisory and  
Professional Association

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Milt Waalkens  
United Public Employees Local 790

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Gene Nunes  
BART Police Officers  
Association

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Everett Riehl  
Amalgamated Transit Union, Local  
1555

September 30, 1980

Mr. Larry Williams, Director  
BART Employee Relations  
800 Madison Street  
Oakland, CA. 94607

Re: **ROLE OF THE INVESTMENTS COMMITTEE**

Dear Mr. Williams:

At yesterday's meeting (September 29), you are aware the Committee voted unanimously that, in the event employees vote to withdraw from Social Security coverage, Centrecorp of Oakland be designated to handle both the IRS Qualified Plan and Deferred Compensation as retirement/investment vehicles.

In response to your earlier questions concerning our interest in maintaining a continuing role for the Committee/Employee Organizations in such eventuality, you responded as follows:

- 1) The District has no objection to a 5-Party Agreement (the four organizations and BART operating as a Joint Trust) to enter into any Agreements to provide such programs; however
- 2) Any such Agreements would be reviewed by your Legal department and/or approved by the Board of Directors as necessary;
- 3) In the case of the Qualified Program, there appears to be no legal difficulties with the Joint Trust concept;
- 4) As to Deferred Compensation, BART has no opposition to a similar Joint Trust, provided such is legally permissible (there seems to be some question concerning BART being required to hold the Contract) or, as an alternate procedure, a format could be instituted to allow the Committee to effectively exercise authority over the Plan operation and funds;
- 5) The Committee would meet at least quarterly on District time, and on such special occasions as necessary to administer the Plans, although no paid time off would be authorized for individual members of the Committee acting independently;
- 6) The Committee would also function to review and approve requests for emergency withdrawal of funds due to hardship situations;

- 7) Actions by the Committee, unless otherwise specified, would continue to require a 4/5 vote.
- 8) Each entity (BART and the four organizations) would designate a Trustee and an alternate Trustee to serve on the Committee meetings (staff could also attend in nonvoting capacities).
- 9) The 6.65% annual contribution by BART (on a maximum salary of \$29,700) in behalf of each employee would not be costed as a part of the economic package in future collective bargaining between any of the Unions and BART; however, any proposals and increases in such contributions resulting from negotiations could be considered as a part of the economic package offered by BART to represented employees. If the foregoing is also your understanding, and provided the other organizations concur, I suggest that you confirm same in writing so that an appropriate Trust Agreement may be drafted and executed by the involved parties.

Sincerely Yours,

Paul Varacalli

cc:J. Danzy, ATU 1555  
R. Hendricks, BPOA, L1008  
R. Peters, BARTSPA  
M. Waalkens  
L. Gerber

October 22, 1980

Mr. Paul Varacalli, Executive Secretary  
United Public Employees Local 390  
522 Grand Avenue  
Oakland, California 94610

Re: **ROLE OF THE BART INVESTMENTS COMMITTEE**

Dear Mr. Varacalli:

This is in response to your letter of September 30, 1980 regarding the above referenced subject, and our subsequent discussions at the Committee meetings on October 2, 1980 and October 16, 1980.

With the exception of the changes noted below, your letter accurately reflects my comments to the Committee on September 29, 1980 regarding my understanding of the continuing role of the Committee in the event BART withdraws from Social Security. The noted exceptions are as follows: (Numerical references are to paragraph numbers in your September 30, 1980 letter.)

- 1) Change "Joint Trust" to "Joint Administrators."
- 3) Change "Joint Trust" to "Joint Agreement."
- 4) Change "Joint Trust" to "Joint Agreement", and end sentence after word "operation." (In the contemplated Deferred Compensation Plan, BART will be the legal owner of the "funds;" however, I am agreeable to allowing the Committee to direct the administration of these funds subject to more detailed provisions to be included in formal documents.)
- 8) Change the first "Trustee" to "Primary Representative" and change "Alternate Trustee" to "Alternate Representative." (These two Representatives would be the only recognized Representatives from each Union/Association for purposes of time off for Committee meetings. Recognized Representatives would be made whole only for time spent in Committee meetings which overlaps scheduled work time.)

(Last Paragraph) Change "Trust Agreement" to "Joint Agreement."

With the above noted understandings, and modifications to your September 30, 1980 letter, we are prepared to proceed to conclude the respective Agreements to effectuate a Deferred Compensation Plan, plus

an IRS Qualified Plan if employees vote to withdraw from Social Security. Obviously, as you have noted, I must seek the review of our General Counsel and the approval of our Board.

By copy of this letter, all other affected labor organizations are notified accordingly. In addition, each Union/Association is requested to designate in writing its Primary and Alternate Representative to the Committee at the next meeting scheduled at 9:00 a.m. on Friday, November 7, 1980 at LMA Headquarters.

If you have further questions, please let me know.

Sincerely,

Larry Williams

LAW:jb

cc:P. L. Cooper

D. R. Bankston

J. Danzy, ATU Div. 1555

R. Hendricks, BPOA

R. Peters, BARTSPA

M. Waalkens, UPE 790

File: Investment Committee, BART

November 6, 1981

**SIDE LETTER OF AGREEMENT: GEN-4-3(A)**

Mr. Everett Riehl, President  
Amalgamated Transit Union - Local 1555  
1440 Broadway, Suite 501  
Oakland, CA 94612

Mr. Milton Waalkens, Chapter Chairperson  
United Public Employees Local 790  
522 Grand Avenue  
Oakland, CA 94610

Mr. Gene Nixon, President  
BART Supervisory and Professional Association  
800 Madison Street  
Oakland, CA 94607

Mr. Glenn Nunes, President  
BART Police Officers Association  
Local 1008 SEIU  
800 Madison Street  
Oakland, CA 94607

Gentlemen:

Attached for your records is an executed copy of the Side Letter of Agreement implementing the transfer of the 1.627% from PERS to the Money Purchase Pension Plan.

Thank you for your cooperation during the ratification process.

Sincerely,

Larry Williams, Chairman  
Investment Plans Committee

LAW:dcm

Attachment

cc:D. R. Bankston/P. L. Cooper

**SIDE LETTER OF AGREEMENT: GEN-4-3(A)**

When signed below by the parties, this letter will constitute a Side Letter of Agreement between the parties on the subject of retirement benefits: Employer-paid contribution of One point six hundred twenty seven percent (1.627%). The undersigned Union agrees, as the sole and exclusive bargaining agent for employees of the Clerical and Maintenance Subunit that the District will, effective January 18, 1982, cease making the Employer-paid contribution to the PERS miscellaneous member account of One point six hundred twenty seven percent (1.627%) of payroll as required by the provisions of Section 29B of the current collective bargaining agreement and the undersigned agree that, in its place and stead, the District shall make such 1.627% contributions to the District's Money Purchase Pension Plan to be credited to the Individual Accounts in the same manner as other contributions to said Plan on behalf of participating employees. Effective January 18, 1982, Section 29B of the Agreement between the parties effective July 1, 1979 - June 30, 1982 is deleted in consideration of the District's agreement to make the above described 1.627% contributions to the District's Money Purchase Pension Plan from and after January 18, 1982 in the same amount and in the same payment periods and for the same duration as it would have been legally required to make such contributions pursuant to the provisions of Section 29B of the agreement in the absence of this Side Letter of Agreement.

This shall also serve as the required written authorization to amend any applicable agreement relating to the Money Purchase Pension Plan to implement the provisions of this Side Letter of Agreement.

This Side Letter of Agreement shall be deemed part of the collective bargaining agreement between the parties and any dispute regarding its interpretation or application shall be subject to the grievance and arbitration provisions of the agreement between the parties dated July 1, 1979 – June 30, 1982.

CONCUR FOR DISTRICT:

CONCUR FOR UNION:

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C. K. Bernard  
General Manager  
SAN FRANCISCO BAY AREA RAPID  
TRANSIT DISTRICT

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UNITED PUBLIC EMPLOYEES Union  
Local 790

cc: Department Heads/D. R. Bankston/P. L. Cooper/J. Troy/ S.  
Wakeman

File: Benefits, Employee General/Investment Plan BART/Retirement  
Plan (PERS)/ Agreements, Side Letters of

June 6, 1988

**SIDE LETTER OF AGREEMENT: UPE -6-2**

Mr. Milt Waalkens, Chapter Chairperson  
United Public Employees Local 790  
522 Grand Avenue  
Oakland, CA 94610

Dear Mr. Waalkens:

The parties agree by this Side Letter, that the Budget Analyst classification is hereby exempt from the application of Contract Section 14.1, Overtime Exemption List.

CONCUR FOR DISTRICT:

CONCUR FOR UNION:

Larry Williams	Date	M. E. Waalkens	Date
Department Manager		Chapter Chairperson	
Employee Relations		UPE, Local 790	

cc: D. R. Bankston

December 13, 1990

**SIDE LETTER OF AGREEMENT: UPE-6-3**

New UPE 790 Pay Plan for Professional Employees

Mr. M. E. Waalkens, President  
United Public Employees, Local 790  
522 Grand Avenue  
Oakland, CA 94610

Dear Mr. Waalkens:

In August, 1990 the Board of Directors approved a step progression pay plan for professional employees represented by UPE Local 790. The pay plan was approved retroactive to January 1, 1990. The pay plan calculations include the three (3) percent contractual increase effective on July 1, 1990.

The major components of the new pay plan are:

- \* the plan incorporates minimum and maximum of current Staff Assistant rates.
- \* five percent intervals between grades and three percent intervals between steps.
- \* flexibility in setting salaries upon appointment.
- \* movement through the steps is based annually on satisfactory performance.
- \* flexibility in reallocating classifications to proper grades based on labor market conditions and classification of work.
- \* employees whose salaries exceed the top step of their allocated paygrade will be "red-circled" and will continue to receive contractual increases.
- \* morale and labor relations problems will be minimized.

Each employee was allocated to the next highest step immediately above their current salary in the assigned grades. Retroactive adjustments have been processed for all eligible employees covered by this new pay plan. Employees were "red-circled" if their salaries exceeded the top of the assigned grade (new employees will be appointed to the proper grade and step within the grade).

Employees will be eligible for a step increase on January 1, 1991 if the following conditions are met:

- (1)the employee was placed in the new pay plan effective January 1, 1990:
- (2)the employee's classification has not changed since January 1, 1990, and;
- (3)the employee's current salary is not at step 5 or "red-circled".

New employees who were hired after January 1, 1990 will be eligible for their next step increase one year after their hire date.

Movement between the steps is on an annual basis, on the anniversary date, based on a satisfactory written performance evaluation by the employee's supervisor and it is not automatic.

Employees will be eligible for a step increase only if their overall performance for the review period is rated "meets criteria".

The performance evaluation must be submitted to the Employee Relations Department for review and approval before they are processed.

When signed below, this Side Letter of Agreement will remain in effect for the life of the current Agreement.

CONCUR FOR DISTRICT:

CONCUR FOR UNION:

\_\_\_\_\_  
 L. T. Knight  
 Department Manager  
 Employee Relations

\_\_\_\_\_  
Date

\_\_\_\_\_  
 M. E. Waalkens  
 Chapter Chairperson, UPE, Local  
 790

\_\_\_\_\_  
Date

\_\_\_\_\_  
 D. C. McFate  
 Manager of Labor Relations

\_\_\_\_\_  
Date

\_\_\_\_\_  
 Larry Gerber  
 East Bay Staff Director, UPE Local  
 790

\_\_\_\_\_  
Date

cc: L. A. Williams/K. Ito/A. Sanchez/W. Wong/M. Griffin

File: Agreement, Side Letter of/New UPE 790 Pay Plan for Professional Employees

October 17, 1994

**SIDE LETTER OF AGREEMENT: ATU/SL-8-9**

Transportation and System Service Department

Ms. Jayne Faria  
President/Business Agent  
Amalgamated Transit Union, Local 1555  
132 Ninth Street  
Oakland, CA 94607

Dear Ms. Faria:

The undersigned parties (ATU Local 1555 and the San Francisco Bay Area Rapid Transit District) agree that the attached organizational structure (Exhibit A) is deemed to be in compliance with Sections 2.1 and S11.0 of the current collective bargaining agreement between the District and the Union. The Union's acceptance of this organizational structure will not be used as precedent to support any other organizational changes, and the Union reserves the right to object to any other structural changes in the District's organization. The District's acceptance of this organization structure will not constitute a waiver of any rights it has to reorganize its organizational structure.

It is also agreed that the organizational changes made by Exhibit A are not intended to affect in any way whatsoever the jobs or work heretofore performed by the bargaining unit classifications encompassed within this organizational structure. No work of any unit employee will be eliminated, or removed from, any job classification or bargaining unit as a result of the parties' agreement to this organizational structure; nor will this organizational structure result in any such work being moved to any other job classification or bargaining unit.

The District re-affirms that as a result of this organizational structure the classifications of employees in the Transportation Department and/or sub-unit will not be assigned or asked to perform work heretofore performed by the SEIU Local 790 bargaining unit; and, that as a result of this organization structure, the System Service Workers and related support and clerical staff, who will continue to be exclusively represented by SEIU Local 790, will not be assigned or asked to perform work heretofore performed by the ATU Local 1555 bargaining unit. The respective ATU/SEIU bargaining units (as defined by the California Department of Industrial Relations on March 6, 1973 and as incorporated in Section 2.1 of the parties' collective bargaining

agreement) will not be changed as a result of the organizational structure made by Exhibit A.

When signed below, this represents the agreement of the parties.

CONCUR FOR DISTRICT:

CONCUR FOR ATU  
LOCAL 1555:

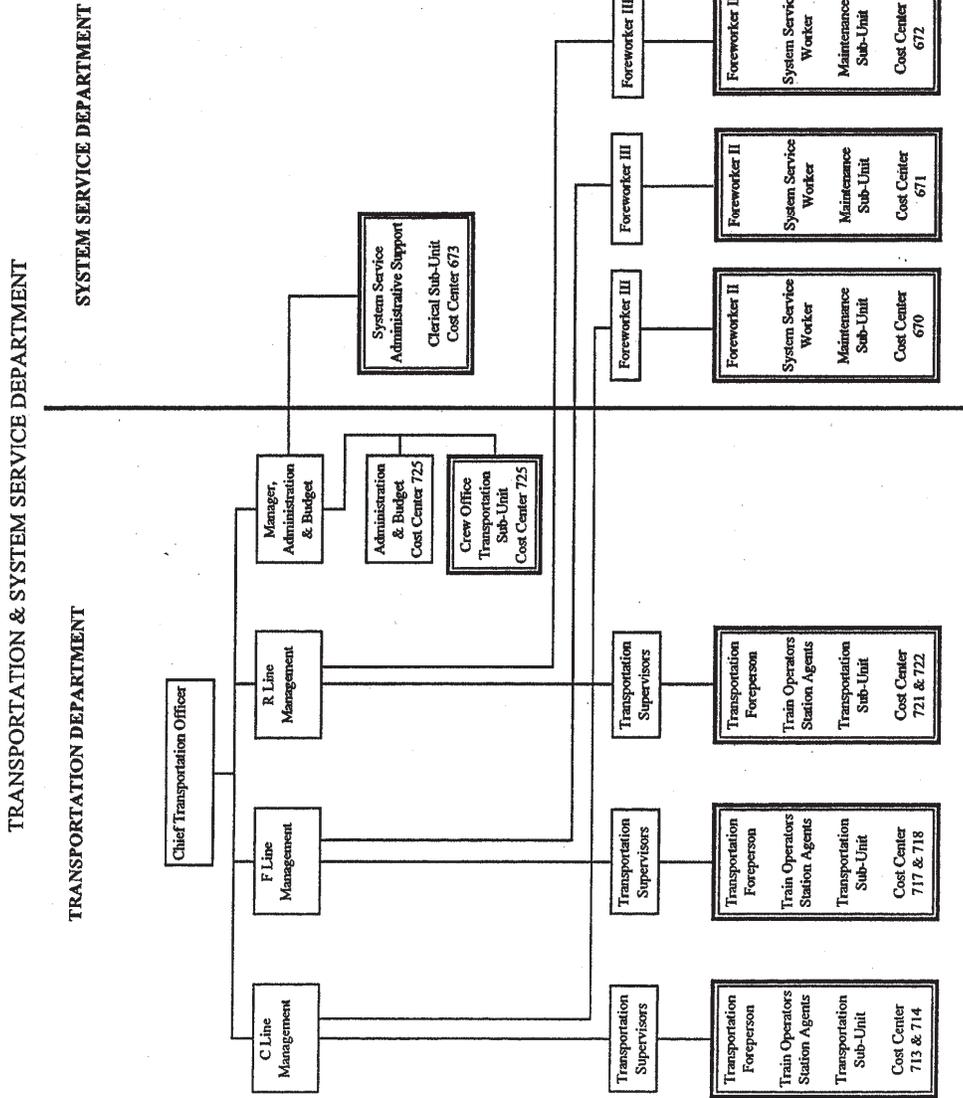
\_\_\_\_\_  
Paul Oversier                      Date  
Chief Transportation Officer

\_\_\_\_\_  
Jayne Faria                      Date  
President, ATU Local 1555

CONCUR FOR SEIU LOCAL 790:

\_\_\_\_\_  
Howard Lewis                      Date  
Manager of Labor Relations

\_\_\_\_\_  
Milt Waalkens                      Date  
President, SEIU Local 790



March 6, 1996

**SIDE LETTER OF AGREEMENT: GEN-4-5**

Mr. Milt Waalkens	Mr. Chuck Baca
SEIU, Local 790	BPOA, Local 1008
100 Oak Street	800 Madison Street
Oakland, CA 94607	Oakland, CA 94607

Mr. Robert Smith	Mr. Gregg Savage
ATU, Local 1555	BPMA
132 Ninth Street, Suite 100	800 Madison Street
Oakland, CA 94607	Oakland, CA 94607

Ms. E. Norma del Mercado  
AFSCME, Local 3993  
P. O. Box 12123  
Oakland, CA 94604

**Subject: Donation of Vacation & Floating Holidays**

The Parties agree on the following procedure for allowing employees to donate vacation and/or floating holidays to affected employees.

1. Employees who donate vacation or floating holidays to an affected employee shall complete and sign a "Donation of Vacation & Floating Holiday Form." The Forms must be delivered to the Human Resources Department. The employees who request to donate shall identify the affected employee, number of hours they request to donate, and they shall have at least that many hours in their account.
2. Employees who donate vacation and/or floating holidays agree that their balance of vacation and/or floating holiday hours will be reduced by the amount they donate.
3. To be an eligible recipient the person shall be a full-time or part-time employee with a catastrophic emergency, who has depleted all available sick leave, vacation, compensatory time, floating holidays, disability payments and is in a non-paid status.
4. A catastrophic emergency is a medical and/or family emergency requiring the employee to be off work in a non-paid status which results in a financial crisis.

5. All donor forms received by Human Resources shall be processed within each two (2) week payroll period.

Howard Lewis Manager, Labor Relations	Date	Milt Waalkens President/BART Chapter Service Employee International Union, Local 790	Date
		Robert Smith President/Business Agent Amalgamated Transit Union, Local 1555	Date
		Gregg Savage President, BART Police Managers Association	Date
		E Norma del Mercado President American Federation of State, County and Municipal Employees, Local 3993	Date
		Chuck Baca Acting President BART Police Officers Association	Date

March 8, 1999

**SIDE LETTER OF AGREEMENT: SEIU-1-9**

Mr. Dennis Kaczor  
President/BART Chapter  
Service Employees International Union  
Local 790  
100 Oak Street  
Oakland, CA 94604

**SUBJECT: CAD DRAFTERS**

Dear Mr. Kaczor:

A desk audit was conducted on the CAD Drafter positions in Drafting and Configuration Control. The desk audit determined that the positions are properly classified as CAD Drafters.

A market survey was conducted on the CAD Drafter classification. The survey determined that a salary adjustment of five percent (5%) is appropriate to bring the BART salary closer to the market 75<sup>th</sup> percentile. The five percent (5%) salary adjustment is retroactive to April 30, 1997. On April 30, 1997, the then hourly base rate of pay for CAD Drafters was \$21.7837 per hour. The five percent (5%) salary adjustment will result in a new hourly base rate of pay of \$22.8728 on April 30, 1997.

As a result of the five percent (5%) salary adjustment on April 30, 1997, the base rates of pay in Section 28.4 Base Wage Schedule of the 1997 – 2001 Labor Agreement for the CAD Drafter classification (Engineering Aide III pay grade) have been revised. The revised Base Wage Schedule for Engineering Aide III is reflected in the attachment.

CONCUR FOR DISTRICT:            CONCUR FOR UNION:

Howard Lewis	Date	Dennis Kaczor	Date
Manager of Labor Relations		President/BART Chapter Service	
		Employees International Union, Local 790	

Ken Holmes	Date
Vice-President	
BART Chapter Service Employees	
International Union, Local 790	

July 12, 2000

**SIDE LETTER OF AGREEMENT: FSA SEIU/SL 6-7**

**PART A: Parties**

The parties to this side letter are SEIU Local 790 (hereinafter "SEIU" or "Union") and the San Francisco Bay Area Rapid Transit District (hereinafter "District").

**PART B: Background**

1. The parties are signatories to a 1997-2001 collective bargaining agreement (hereinafter "1997-01 Agreement") covering members of the certified SEIU bargaining unit.
2. The 1997-2001 Agreement does not provide Medical Premium Conversion, Medical Spending Accounts (hereinafter "MSA's"), or Dependent Care Accounts (hereinafter "DCA's"). Medical Premium Conversion, MSA's and DCA's are hereinafter jointly referred to as the "Program." They are mechanisms through which employee health insurance premium contributions, qualified medical expenses not covered by insurance, and qualified expenses incurred by employees to care for certain dependents may be exempted from certain taxes.
3. The parties wish to offer the Program to members of the SEIU bargaining unit. However, to ensure efficient administration, the District is prepared to do so at this time only if all District bargaining units simultaneously agree to participate on the same terms.
4. The District and its unions established a joint labor-management committee to identify and recommend a vendor to provide certain administrative services related to the implementation and management of the Program.
5. The District will perform certain administrative functions it deems reasonable and necessary related to implementation of the Program not performed by the vendor (e.g. Program communications, creation of general ledger records needed to independently validate enrollment, etc.). For cost estimate and fee calculation purposes, the parties have initially agreed to assume that these functions will require one and one-half full-time equivalent positions, including an SA III H1 (payroll) and a Clerk III (benefits).
6. The District will enjoy some savings as a result of the implementation of the Program. However, the District is not a participant in the non-Medicare portion of the federal Social Security program and will,

therefore, not enjoy much of the savings that employers who participate fully in Social Security enjoy when implementing the same program.

7. The fact that the District will not enjoy reduced Social Security costs but will incur substantial expenses means that other revenues must be generated if the Program is to be implemented at no net cost to the District.
8. The joint labor-management committee has discussed methods of funding the District's net program related expenses.
9. The joint labor-management committee has recommended adoption of an initial monthly fee that each District employee enrolled in its medical insurance programs will be charged to defray the District's projected net cost of administering the Program.
10. The Union concurs with the joint labor-management committee's recommendation.
11. The parties acknowledge that the monthly rate may be a mandatory subject of bargaining. However, the parties desire that employees pay the same rate on a District-wide basis insofar as possible that will cover the actual net cost to the District of administrative functions performed in administration of the Program.

The parties agree as follows:

### **PART C: Exchange of Promises and Obligations**

Section 1. PROGRAM INITIATION AND TERMINATION. The District shall establish the details of the Program effective January 1, 2001. The "Program" consists of three parts: Medical Premium Conversion, Medical Spending Accounts and Dependent Care Accounts. The District may terminate the Program or any of its parts if, in the District's judgment, the Program or part no longer meets the requirements of law or does not qualify for tax-exempt treatment.

Section 2. OPEN ENROLLMENT. The District shall establish an open enrollment period for the program to occur either separately or at the same time as other District open enrollment processes. In any event, the open enrollment period shall occur prior to January 1, 2001 and once per year thereafter.

Section 3. TERMINATION FROM THE PROGRAM. Employees who terminate from District employment (through retirement or otherwise) or who are placed on inactive status shall be permitted to continue to

participate in the Program only in accordance with the terms of the Program and applicable federal and state law. Employees who are terminated from the Program during a given plan year and who are rehired during that same plan year shall be permitted to re-enroll in accordance with the terms of the Program and applicable federal and state law, but in no event later than the next following open enrollment period for the Program. Employees on inactive status include those who have exhausted their available sick leave, vacation leave, holiday leave and available compensatory time off and who are on unpaid leaves of absence or eligible for short or long-term disability or Industrial Accident payments.

Section 4. CHARGE TO EMPLOYEES FOR DISTRICT'S NET ADMINISTRATIVE COSTS. Subject to Section 5 below, each employee in the SEIU bargaining unit enrolled in a District medical insurance plan shall be charged two dollars and eighty-two cents (\$2.82) each month to defray the District's net District-wide cost for functions it performs that are reasonably necessary to administer and account for the Program. This amount shall be deducted once each month at the last pay date of the month. The District shall maintain a record of staff time and other expenses incurred to administer and account for the Program to provide the parties with objective data on which to base discussions conducted pursuant to section 5 below.

Section 5. REVISIONS TO MONTHLY CHARGE.

A. Meeting(s) To Discuss Rate. Except as provided in Section 9 below, the parties agree to meet between March 15 and April 1 of each even numbered year beginning in 2002 to discuss possible modification of the monthly charge deducted from employee paychecks pursuant to Section 4 above that will apply for the two years that ensue the following January 1. The parties may propose a modified rate to cover the ensuing two-year period, or may propose separate rates for each of the two ensuing two years. If after ten (10) days from the date of such meeting the parties are unable to reach an agreement on the amount of such charge(s) for the ensuing two year period, the matter shall be submitted to arbitration pursuant to Section 6 below. However, if the parties agree on a modified rate structure or to continue the pre-existing rate structure prior to issuance of an arbitration award, the arbitration request shall be withdrawn or, if the hearing has begun, the hearing shall be terminated and the arbitrator shall not issue an award.

B. Access To Information. During the meeting(s) described in subsection A of this section, each party agrees to share with the other

the data and assumptions that form the basis of the party's proposed rate structure. The parties additionally agree that during the period beginning January 15 immediately preceding the first such meeting and ending with the establishment of a revised rate pursuant to this section, each shall provide the other with such information as is reasonably necessary and reasonably within their control to carry out their respective roles in the discussions and any impasse resolution proceedings carried out pursuant to section 6 below. If the parties are unable to reach agreement on a revised fee structure, the arbitrator appointed pursuant to section 6 below shall resolve all disputes concerning an alleged breach of this subsection during the thirty (30) day period immediately preceding the hearing date established pursuant to section 6 below. The party that desires resolution of such a dispute shall petition the arbitrator by letter with a copy to the other side. The arbitrator shall consult simultaneously with the parties' respective representatives and thereafter issue an order resolving the dispute.

Section 6. ARBITRATION OF MONTHLY CHARGE.

A. Scheduling the Hearing Date. On the regular business day nearest to January 10 of calendar years in which the parties will meet to discuss possible revisions to charges pursuant to Section 5 above, the parties shall select an arbitrator in the same manner as for grievance arbitration under the parties' collective bargaining agreement. The selected arbitrator shall be immediately notified of his or her selection and requested to hold the regular business day nearest to but not before May 1 of the same calendar year open for hearing and resolving a dispute over the appropriate monthly charge pursuant to Section 5 above. The parties shall each submit their last-best offer to the arbitrator and to the other party not later than April 20 preceding the hearing date. Neither party may change their last-best offer after it is submitted unless they receive written permission from the other party.

B. Hearing. The arbitrator appointed pursuant to Section 6(A) above shall conduct a hearing on the date scheduled pursuant to subsection A above of this Section. During the hearing, the arbitrator shall permit each party to present in support of its proposed rate(s) such relevant evidence as it desires concerning the District's past and anticipated costs and savings incurred as a result of its implementation and on-going operation of the Program. Such costs and savings may include but are not limited to:

1. Medicare contributions that the District is not required to make because of the tax laws and rules governing the Program;

2. Any positive and negative employee Medical Spending and Dependent Care Account balances at the end of the plan year;

3. Any interest the District may earn on funds in Medical Spending or Dependent Care accounts, if not already accounted for under 2 immediately above.

4. Charges in excess of or less than actual net District costs incurred to implement and administer the Program during the two-year period to which the rate structure in effect at the time of the hearing applies. For example, for the hearing held in May, 2002 the applicable measurement period is January 1, 2001 through December 31, 2002. Charges considered shall include a reasonable projection of the total that will accrue by the end of the applicable two-year period.

5. Vendor and consultant charges (including outside counsel) incurred by the District in connection with the implementation and operation of the Program.

Costs for work performed by District employees to implement, operate or account for the Program including, but not limited to, conducting open enrollment, change of status enrollments, and new employee enrollments, inputting enrollment data, processing terminations from the Program, inputting termination data, managing participation of retirees in the program pursuant to COBRA, responding to inquiries from employees or their representatives, preparing and disseminating written Program information to employees or their representatives, downloading data to and from the vendor, analyzing data to be downloaded or that has been downloaded, creating and maintaining transaction records independent of those maintained by the vendor to ensure existence of an independent audit trail.

C. Arbitrator's Decision. Within seven (7) days after the hearing, the arbitrator shall award the rate(s) contained in either the District's or Union's last-best offer submitted pursuant to subsection A above. Such award shall be based on the evidence produced at hearing and reflect the arbitrator's opinion concerning the offer that most closely reflects the District's net district-wide per employee monthly cost for implementing, operating and accounting for the Program in the two year period beginning the following January 1, taking into account any

substantial overcharges or undercharges that are established by the evidence for the period in which the hearing occurs.

SECTION 7. ENTIRE AGREEMENT. This written instrument reflects the entire agreement of the parties. There are no terms or promises related to the subject matter addressed, except as expressed in writing herein.

SECTION 8. CHANGES TO CONFORM WITH LAW. The District may immediately implement such changes in the Program as, in the District’s judgment, are necessary to ensure that the Program and its parts conform with law and remain tax exempt. The District shall meet with the Union as soon as feasible to discuss the basis for such changes and any alternatives.

SECTION 9. DURATION. The parties may modify or terminate this agreement at any time by mutual agreement. Otherwise, this agreement shall remain in effect through the life of the 1997-2001 collective bargaining agreement between the parties and the first successor thereto. Upon expiration of said successor agreement but prior to the signing of the next successor agreement, the continuation, modification, or discontinuation of the Side Letter shall be governed by collective bargaining.

Done this day, July 12, 2000.

For the District:

For the Union:

\_\_\_\_\_  
Darrell Murray  
Labor Relations Manager

\_\_\_\_\_  
Dennis Kazor  
President/BART Chapter

\_\_\_\_\_  
John Maher  
Vice-President  
BART Chapter

\_\_\_\_\_  
Suzanne Angeli  
President  
BART Professional Chapter

**SEIU Side Letter No. 7-5: RS&S Work Crews For Shop-Specific Projects****A. Parties**

The parties to this Side Letter agreement are SEIU Local 790 ("Union") and the San Francisco Bay Area Rapid Transit District ("District").

**B. Background**

The parties are signatories to a 2001-05 collective bargaining agreement ("CBA"). The District's Rolling Stock and Shops Division ("RS&S") has expressed a desire to assign employees from a particular shop to work on project crews that have a limited duration reflecting the nature of the project work involved. Sections 24.5 and 27.1 of the CBA regulate the filling of work assignments in a manner that is incompatible with the in-shop filling process and the duration of project work contemplated by RS&S. The parties acknowledge that in a given circumstance employees and the District could benefit if these restrictions and other related terms of the contract were waived. The purpose of this agreement is to set forth the terms under which such a waiver could take place.

**C. Promises and Obligations**

1. The District and Union may enter into ad hoc agreements that waive application of the terms of sections 24.2, 24.3, 24.4, 24.5, 24.8 and 27.1 of the CBA when the Manager of RS&S desires to create a project crew in a particular shop within RS&S drawn from employees already working in the location at which the work is to be performed.
2. The ad hoc agreements referred to in 1 above may be entered into by the consent of and shall be in writing and signed by the Union President, the Manager of RS&S and the Labor Relations Manager.
3. The ad hoc agreements referred to in 1 above shall set forth the starting date for the project and an expiration date for the ad hoc agreement. An ad hoc agreement shall not be employed to fill a temporary vacancy as defined in the CBA.
4. The District may terminate any ad hoc agreement made pursuant to this agreement prior to the expiration date at its discretion by written notice to the union. The parties may also extend the ad hoc agreement in writing to a date certain. Such extension must be signed as provided in 2 above.
5. Only employees who volunteer for projects covered by an ad hoc agreement as provided herein shall participate in that project.

Preference shall be given within a classification in the affected location based on classification seniority.

**D. Other Terms**

1. This written document contains the entire agreement between the parties.
2. This agreement shall be deemed a Side Letter that is part of the 2001-05 CBA.

Done this day, September 9, 2004.

For the District:

For the Union:

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Darrell Murray  
Labor Relations Manager

---

Roxanne Sanchez  
President,  
SEIU Local 790, BART Chapter

---

Bud Brandenberger  
Vice-President,  
SEIU Local 790, BART Chapter

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Ray Quan  
Vice-President,  
SEIU Local 790, BART Chapter

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Larry Hendel  
Staff Director, SEIU Local 790

August 19, 2009

**SIDE LETTER OF AGREEMENT: SEIU/SL-10-1**

**Retiree Medical Eligibility And Cost Savings**

**SIDE LETTER RE: RETIREE MEDICAL ELIGIBILITY AND COST SAVINGS**

Ms. Lisa Isler  
President, BART Chapter  
SEIU Local 1021  
100 Oak Street  
Oakland, CA 94607

Ms. Suzanne Angeli  
President, BART Professional Chapter  
SEIU Local 1021  
100 Oak Street  
Oakland, CA 94607

Dear Ms. Isler and Ms. Angeli:

This letter of understanding reflects the agreement reached between the District and Service Employees International Union, Local 1021 in regard to potentially increasing the years required for retiree medical eligibility under the District's medical benefits plan, and to meet to discuss allocation of projected actuarial savings accruing from implementing the retiree medical eligibility schedule, including potential allocation to wage increases in Fiscal Years 2012 and 2013.

Commencing no later than ninety (90) days after ratification of the 2009-2013 contract, the parties, together with all other interested bargaining units, shall meet to outline the terms of a proposed 15 year retiree medical eligibility schedule for future hires. The parties shall jointly seek CalPERS preliminary approval for the proposed retiree medical eligibility schedule, and if necessary, jointly sponsor legislation to amend the California Government Code to permit adoption of a 15 year retiree eligibility schedule under PEMHCA. The parties shall seek to have such legislation introduced in either the California Assembly or Senate in calendar year 2010, or as soon thereafter as practicable. The parties will actively support the passage of such legislation.

If the proposed retiree medical schedule or legislation is approved, the parties, together with all other interested bargaining units, shall meet to discuss allocation of projected actuarial savings accruing from implementing the new schedule, including allocation to wage increases in Fiscal Years 2012 and 2013. If the parties reach agreement, they shall adopt the new retiree medical eligibility schedule and wage increase allocations effective in Fiscal Year 2012 or 2013.

CONCUR FOR DISTRICT:  
FOR THE DISTRICT

CONCUR FOR UNION:  
FOR SEIU

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M. Carol Stevens  
Chief Negotiator

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Larry Gerber  
Chief Negotiator, SEIU

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Teresa Murphy  
Assistant General  
Manager/Administration

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Lisa Isler  
President BART Chapter

---

Maria Robinson  
Acting Department Manager  
Labor Relations

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Suzanne Angeli  
President Professional Chapter

February 18, 1977

**MEMORANDUM OF UNDERSTANDING: UPE/ MOU 002-4**

Mr. Paul Varacalli  
 Executive Secretary  
 United Public Employees Local 790  
 522 Grand Avenue  
 Oakland, California 94610

Dear Mr. Varacalli:

The following is offered as a clarification of Milt Waalkens' letter to me dated September 13, 1976, regarding chief stewards and other Union officials exercising their super seniority rights per Section 20.2 within the UPE Collective Bargaining Agreement.

The chief steward or other Union officers will displace a worker within his/her classification who works the day shift and has Saturday and Sunday as regular days off. The displaced employee must exercise his/her seniority rights in accordance with Section 25.2A. The procedure shall continue until such time as all positions are filled.

This is given to clarify the intent of the parties during contract negotiations and is not an attempt to legally interpret the Agreement.

Please indicate your concurrence by affixing your signature in the space provided below.

Sincerely,

Donald R. Bankston  
 Supervisor of Labor Relations

CONCUR FOR DISTRICT:

CONCUR FOR UNION:

\_\_\_\_\_  
 J. E. Terry

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Paul Varacalli

\_\_\_\_\_  
 Date

Director of Employee Relations

Executive Secretary, UPE Local 790

cc:R. D. Gallaway

File: Seniority (63)/Reduction in Force (67)/Union Representatives -  
 UPE/Understandings, Memos of - UPE

July 1, 1982

**MEMORANDUM OF UNDERSTANDING: UPE/MOU 007-4**

Mr. Milton Waalkens, Chapter Chairperson  
United Public Employees Union Local 790  
522 Grand Avenue  
Oakland, CA 94610

**SUBJECT: 4-10 Work Week Plan**

Dear Mr. Waalkens:

It is agreed that, during the term of the 1982-85 Agreement, the following classifications will continue to work under the 4-10 Work Week Plan:

- Mainline Technicians
- Emergency Vehicle Operators
- Automatic Fare Collection Electronic Technicians
- Building Repair Workers
- Transit Information Center

Effective July 1, 1990, the District may change the schedule of work for employees in the Electronic Repair Shop (ERS) to a 5-8 Work Week Plan instead of 4-10 Plan.

CONCUR FOR DISTRICT:

CONCUR FOR UNION:

\_\_\_\_\_  
 Larry Williams  
 Department Manager,  
 Employee Relations

\_\_\_\_\_  
Date

\_\_\_\_\_  
 Milt Waalkens  
 Chapter Chairperson,  
 UPE Local 790

\_\_\_\_\_  
Date

cc:R.P. Demko/E. Bailey/V.P. Mahon

File: Understandings, Memoranda of/ 4-10 Work Week

July 1, 1982

**MEMORANDUM OF UNDERSTANDING: UPE/MOU 022-6**

4 - 10 Work Week

Mr. M.E. Waalkens, President  
 United Public Employees Union Local 790  
 522 Grand Avenue  
 Oakland, CA 94610

Dear Mr. Waalkens,

When signed by the parties, this will become a Memorandum of Understanding between the District and United Public Employees Union Local 790 effective July 1, 1988.

The parties agree that:

1. All employees within the Cash Handling Building currently working a 4-10 Work Week may continue to do so during the life of this Agreement.
2. Effective July 1, 1988, newly hired Cash Handler III's, IV's and Foreworkers, or volunteers from the existing Cash Handling workforce may work either a 4-10 or 5-8 Work Week, on any shift, as determined by Management.

This Memorandum of Understanding will remain in full force and effect for the life of the present Agreement (1988 - 1991).

CONCUR FOR DISTRICT:

CONCUR FOR UNION:

\_\_\_\_\_  
 Larry Williams  
 Department Manager  
 Employee Relations

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 M. E. Waalkens  
 Chapter, Chairperson  
 UPE Local 790

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 D. R. Bankston  
 Manager, Labor Relations

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 L. Gerber  
 Staff Director, UPE 790

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 L. W. Gaulter  
 Date

File: Special Provisions - Cash Handlers Understandings, Memoranda of/  
 4-10 Work Week

March 21, 1983 (Revised 6/30/94)

**MEMORANDUM OF UNDERSTANDING: SEIU/MOU 011-4**

Relief Shift - Rolling Stock & Shops

Mr. M. E. Waalkens, President, BART Chapter  
Service Employees International Union Local 790  
522 Grand Avenue  
Oakland, California 94610

Dear Mr. Waalkens:

It is mutually agreed between the District and Service Employees International Union Local 790 that on a non-precedent setting basis Relief Shift positions shall be created to staff the Trouble Desk in Rolling Stock & Shops. Said positions shall be governed by this Memorandum of Understanding:

1. The Relief Shift positions will be utilized for relief of job assignments involving multiple starting times and multiple RDOs including vacancies created by sick leave, vacation, disability and leaves of absence.
2. The incumbents must be able to work all shifts with a minimum of twenty-four (24) hours notice. The incumbents and the supervisor in conjunction with the Union Representative, when possible, may mutually agree to waive the twenty-four (24) hours notice requirement in writing on a case by case basis.
3. These positions shall be filled through the normal bid procedure (Article 24).
4. The employees awarded such positions shall be granted a twelve percent (12%) differential above the base rate of pay plus shift differential, if applicable, for all hours worked.
5. The incumbents will be granted a minimum of forty (40) hours per week and will be compensated at the overtime rate for all hours worked in excess of eight (8) hours per day or forty (40) hours per week.
6. The incumbents shall not have the option of signing the Overtime Exception List.

This Memorandum of Understanding is applicable only to the Trouble Desk Clerks in Rolling Stock & Shops and will not be applied and/or be

utilized in any other District operation or function, unless mutually agreed to by the parties.

When signed below this will represent the understanding of the parties for the life of the present Agreement (1994-1997).

CONCUR FOR DISTRICT:

CONCUR FOR UNION:

---

Leslie T. Knight                      Date  
 Department Manager  
 Human Resources

---

M. E. Waalkens                      Date  
 President, BART Chapter  
 SEIU Local 790

---

Howard W. Lewis                      Date  
 Manager of Labor Relations

---

L. P. Gerber                      Date  
 East Bay Staff Director  
 SEIU, Local 790

LAW/LTK:hjl

cc:E. Green

File: Shift Relief,  
 Understanding, Memo of

January 31, 1985

**MEMORANDUM OF UNDERSTANDING: UPE/MOU 014-4**  
Rolling Stock Foreworker Meal Periods

Mr. M. E. Waalkens, Chapter Chairperson  
United Public Employees Local 790  
522 Grand Avenue  
Oakland, CA 94610

Dear Mr. Waalkens:

Based on current operating procedures, the following understanding is agreed to between the parties in reference to Rolling Stock Foreworker Meal Periods (Rolling Stock Maintenance):

1. Clerks will answer phones during lunch hours.
2. Clerks will screen calls to determine if there is an emergency, i.e., requiring a Rolling Stock Foreworker to send out and direct crew members.
3. In the event a Rolling Stock Foreworker "works" during lunch hour or fifteen (15) minute Break Period, he/she will be compensated with other time; or if other time cannot be given, he/she will be paid for the amount of time worked.
4. The practice of paying a Rolling Stock Foreworker up to fifteen (15) minutes (.3 hours) for early arrival for turnover purposes will be continued.

CONCUR FOR DISTRICT:

CONCUR FOR UNION:

\_\_\_\_\_  
D. R. Bankston  
Manager, Labor Relations

\_\_\_\_\_  
Date

\_\_\_\_\_  
M. E. Waalkens  
Chapter Chairperson  
UPE Local 790

\_\_\_\_\_  
Date

\_\_\_\_\_  
Fred Stephens  
Department Manager  
Rolling Stock Maintenance

\_\_\_\_\_  
Date

\_\_\_\_\_  
Larry Gerber  
Senior Business Rep.  
UPE Local 790

\_\_\_\_\_  
Date

\_\_\_\_\_  
Wally Weihe  
Area Shop Steward

\_\_\_\_\_  
Date

File: Understandings, Memos of/ Grievance File  
No. 14/1.5/FDI-17/Arbitration #436-83

May 10, 1990

**MEMORANDUM OF UNDERSTANDING: UPE/MOU 028-6**

Clerical Staff Overtime Procedure - Transit Information Center

Mr. M. E. Waalkens, President  
United Public Employees Local 790  
522 Grand Avenue  
Oakland, California 94610

Dear Mr. Waalkens:

It is mutually agreed between the District and United Public Employees Local 790 that on a non-precedent setting basis, a Clerical Staff Overtime Procedure ("Procedure") shall be implemented in the Transit Information Center. This procedure shall be governed by this Memorandum of Understanding:

**CLERICAL STAFF OVERTIME PROCEDURE**

GENERAL OVERVIEW

The purpose of this Procedure is to document the process by which Clerks from other departments will be trained and utilized by Transit Information Center staff to provide overtime coverage at the Transit Information Center in the event no Transit Information clerks are available to cover the overtime required during the weekdays or on the weekends. An individual must pass the training program to be eligible for the overtime call-in list.

TRAINING

Transit Information staff will train a maximum of three (3) clerks at a time to work in the Center. Training schedules will be based on individual candidate's availability and work schedules. The training time will be based on the individual candidate's ability to learn transit information. The average training time is forty (40) hours.

However, individuals may complete the training in less time. Individuals will be paid at the straight time rate of the Transit Information Clerk during the training period.

The Supervisor of Transit Information will determine when a candidate is ready to assume the responsibility of the trouble desk. Once an individual has been trained, the individual will be paid overtime at the prevailing rate.

REQUIREMENT FOR STAYING IN THE PROGRAM

If an individual is tardy or a no-show an unreasonable number of times or performs unsatisfactorily, the individual may be removed from the program for a specified period of time or removed permanently from this program at the discretion of the Supervisor of Transit Information.

REFUSED ASSIGNMENT

If an individual is unavailable for overtime for an unreasonable number of times, the individual may be removed from the eligibility list for a specified period of time or permanently removed from the list at the discretion of the Supervisor of Transit Information.

This Memorandum of Understanding is applicable only to the Transit Information Center and will not be applied or utilized in any other District operation or function, unless mutually agreed to by the parties. When signed below, this will constitute the understanding of the parties for the life of the present 1988-1991 Agreement.

Concur for District:

Concur for Union:

\_\_\_\_\_  
D. C. McFate  
Manager of Labor Relations

\_\_\_\_\_  
Date

\_\_\_\_\_  
M. E. Waalkens  
President, BART Chapter  
SEIU Local 790

\_\_\_\_\_  
Date

cc:N. Aragon

File: Clerical Staff Overtime -Transit Information Center  
Understanding, Memoranda of



April 22, 1993

**MEMORANDUM OF UNDERSTANDING: SEIU/MOU-033-7**

Mr. Milt Waalkens  
President, BART Chapter  
UPE, Local 790  
522 Grand Avenue  
Oakland, CA 94612-3599

Re: System Service Issues

Dear Mr. Waalkens:

It is mutually agreed between the District and UPE Local 790 that:

1. The letter of understanding and organizational chart (attached) comply with Arbitrator Cohn's award in Arbitration Case No. 655-92 issued on May 18, 1992 and represent full and final resolution of any issues regarding implementation of same.
2. A rebid will be conducted in accordance with the January 19, 1993, schedule (attached). Individuals will select positions based on departmental seniority. A seniority list to be used for future bidding purposes will be established utilizing departmental seniority.
3. Three area stewards will be added to the existing stewards currently representing System Service Workers (SSW's); two to represent SSW's on the second shift and one to represent SSW's on the grave shift. One area steward will be added to the existing stewards currently representing Foreworkers to represent System Service Foreworkers.
4. Seven SSW positions will be upgraded to the MWI pay grade.
5. All reprimands active as of the date of this agreement will be deactivated.
6. The grievances listed below will be resolved in the following manner:
  - a. Arbitration No. 661-92 (Contracting Out)-Grievance No. 92-6-089 withdrawn by the Union.
  - b. 91-6-137 - Grievance resolved. Grievant Adin to be paid eight hours overtime.
  - c. 91-6-138 - Grievance resolved. Grievant Switzer to be paid eight hours overtime.

- d. 91-6-139 - Grievance resolved. Grievant Amey to be paid eight hours overtime.
- e. 92-6-004 - Grievance resolved. Grievant Perez to be paid the difference between SSW and MWII pay for eight hours.
- f. 92-6-068 - Grievance resolved. Linda Mallory to be upgraded from an Intermediate Clerk to a Senior Clerk effective the signing of this agreement. Ms. Mallory will be compensated at the next highest step in the Clerk IV pay grade above her current Clerk III rate retroactive to October 5, 1992. The work assigned to the Senior Clerk position may be modified to incorporate higher level duties requiring the exercise of independent judgment consistent with the Senior Clerk classification.

Because of any absence of Ms. Mallory, two (2) 790 bargaining unit employees will be trained in order to perform her job duties on a temporary assignment per Section 27.1.

- 1) Employees will be trained on their own time at the straight time rate of pay.
- 2) Backfilling will be for periods of longer than one week.
- g. 92-6-070 - Grievance resolved. System Service Workers who held System Service Worker positions on July 1, 1991, through the effective date of this agreement will be paid \$100 each. This will resolve all alleged uniform violations from the period July 1, 1991, through June 30, 1993.
- h. 92-6-079/92-6-133 - Grievances resolved. System Service Workers assigned to the Scrub Crew from April 28, 1992, to the date of this agreement will be paid relief shift pay for hours worked. Effective the signing of this agreement, Scrub Crew members will continue to report to their work location(s), as determined by management, at their current rate of pay (no relief shift pay applicable). The parties agree that this resolution shall remain in effect until such time as the parties mutually agree to a change. This provision shall remain a part of subsequent Collective Bargaining Agreements.
- i. 92-6-135 - Grievance withdrawn by the Union.
- j. 92-6-136 - Grievance withdrawn by the Union.



August 26, 1993

**MEMORANDUM OF UNDERSTANDING: SEIU/MOU-034-7**

Building Foreworker Classification

Milt Waalkens  
 President, BART Chapter  
 United Public Employees, Local 790  
 522 Grand Avenue  
 Oakland, CA 94610-3599

Subject: Buildings Foreworker Classification

Dear Milt:

This is to confirm the understanding reached August 17, 1993 regarding the existing Painting Foreworker classification dated August 1987 and Buildings Foreworker classification dated April 1988:

- 1) The parties mutually agree to delete the Painter Foreworker classification from Section 28.2 (Functional Classification) of the CBA, as the Buildings Foreworker job classification (attached) dated August 1993, will be modified to reflect the merging of the August 1987 Painting Foreworker and April 1988 Buildings Foreworker job descriptions.
- 2) The District will assign a lead among the Painters during the regular work week (Monday through Friday). This lead assignment will be offered to the most senior Painter.

When signed below, this Memorandum of Understanding will remain in full force and effect for the life of the present 1991-1994 Agreement.

Concur for District:

Concur for Union:

\_\_\_\_\_  
 Shirley Wong                      Date  
 Labor Relations Representative

\_\_\_\_\_  
 Milt Waalkens                      Date  
 President/UPE

Attachment

cc:I. Borcover/ J. Torrisi/ W. Wong

May 10, 1990 (Revised June 14, 1994)

**MEMORANDUM OF UNDERSTANDING: SEIU/MOU 027-6**  
Clerical Staff Overtime Procedure - Rolling Stock & Shops

Mr. M. E. Waalkens, President  
Service Employees International Union Local 790  
522 Grand Avenue  
Oakland, California 94610

Dear Mr. Waalkens:

It is mutually agreed between the District and Service Employees International Union Local 790 that on a non-precedent setting basis, a Clerical Staff Overtime Procedure ("Procedure") shall be implemented for the Trouble Desk in Rolling Stock & Shops. This procedure shall be governed by this Memorandum of Understanding:

**CLERICAL STAFF OVERTIME PROCEDURE**

GENERAL OVERVIEW

The purpose of this Procedure is to document the process by which Clerks from other departments will be trained and utilized by Rolling Stock & Shops (RS&S) staff to provide overtime coverage at the Trouble Desk position in the event no clerks are available to cover the open Trouble Desk shift required during the weekdays or on the weekends. An individual must pass the training program to be eligible for the overtime call-in list.

TRAINING

Rolling Stock & Shops will train a maximum of two (2) clerks at a time to work the Trouble desk.

Training schedules will be based on individual candidate's availability and work schedules. The training time will be based on the individual candidate's ability to learn the trouble desk. The average training time is one hundred sixty (160) hours.

However, individuals may complete the training in less time. Individuals will be paid at the straight time rate of the Trouble Desk clerk during the training period. The Trouble Desk supervisor/manager will determine when a candidate is ready to assume the responsibility of the trouble desk. Once an individual has been trained, the individual will be paid overtime at the prevailing rate.

REQUIREMENT FOR STAYING IN THE PROGRAM

If an individual is tardy or a no-show an unreasonable number of times or performs unsatisfactorily, the individual may be removed from the program for a specified period of time or removed permanently from this program at the discretion of the Trouble Desk supervisor/manager.

REFUSED ASSIGNMENT

If an individual is unavailable for overtime for an unreasonable number of times, the individual may be removed from the eligibility list for a specified period of time or permanently removed from the list at the discretion of the Trouble Desk Supervisor/ Manager.

This Memorandum of Understanding is applicable only to the Trouble Desk in the Rolling Stock & Shops (RS&S) Department and will not be applied or utilized in any other District operation or function, unless mutually agreed to by the parties.

When signed below, this will constitute the understanding of the parties for the life of the present 1991-1994 Agreement.

Concur for District:

Concur for Union:

\_\_\_\_\_  
H. W. Lewis  
Manager, Labor Relations

\_\_\_\_\_  
Date

\_\_\_\_\_  
M. E. Waalkens  
President, BART Chapter  
SEIU Local 790

\_\_\_\_\_  
Date

cc:E. Green

File: Clerical Staff Overtime -Rolling Stock & Shops/ Understanding,  
Memoranda of

May 23, 1995

**MEMORANDUM OF UNDERSTANDING: SEIU/MOU-040-8**

Class A Driver's License in Track & Structure

Mr. Milt Waalkens  
President/BART Chapter  
Service Employees International Union, Local 790  
100 Oak Street  
Oakland, CA 94607

**Subject: Class A Driver's License in Track & Structure**

Dear Mr. Waalkens:

The Parties agree to the following procedure in requiring Class A driver's license of employees in Track & Structure:

1. Management has determined the number of Class A driver's licenses needed as follows: In the Structures area two positions require a Class A driver's license for the 5/8 day shift and seven Class A driver's licenses for the 5/8 grave yard shift. In the Tract area two positions require a Class A driver's license for the 4/10 day shift, one Class A license for he 5/8 day shift and seven Class A driver's license for the 5/8 grave yard shift. These positions will be designated as "Positions requiring a Class A Driver's License" for all appropriate reasons, to include work assignment, recruitment, employment and random drug and alcohol testing. If management determines that it needs to increase the number of positions required to have a Class A license, it will notify the Union why the number needs to be increased.
2. At the implementation of this procedure the Union will identify the employees who will be placed into the positions requiring the Class A driver's license. Initially, if a current employee does not have a Class A license they will be given up to 90 calendar days to obtain the license. After the initial implementation, employees in designated license positions must have a Class A license to remain in the position.
3. Management will make training available to MW II or MW III employees within the Track & Structure Department who wish to bid on or hold a position that is required to have a Class A driver's license in the Power &Way Department. It will then be the responsibility of the employee to obtain the required license.

4. After the initial implementation, employees or applicants who are applying for designated Class A driver's license positions will be required to have the Class A driver's license prior to their appointment. An employee or applicant who obtains the Class A driver's license and is appointed into a designated position will be reimbursed for the cost of the required physical examination and application fee upon submission of receipts. Employee's in Track & Structure who request and receive approval will be given official time in a paid status to take the Class A driver's test.
5. Current employee who are required to have a Class A driver's license and lose their license because of a medical condition, based on written notification from Port Medical, will have their pay red circled.
6. Employees who lose their Class A driver's license, for other than a medical condition, will be reduced to a Maintenance Worker II position within Tract & Structure. When the employee demonstrates they have regained the required license, they may bid on a vacant operator position within Track & Structure.

Concur for District:

Concur for Union:

\_\_\_\_\_  
Howard W. Lewis                      Date  
Manager of Labor Relations

\_\_\_\_\_  
Milt E. Waalkens                      Date  
President, BART Chapter  
SEIU Local 790

\_\_\_\_\_  
James M. Dunn                      Date  
Civil Engineer

June 15, 1995

**MEMORANDUM OF UNDERSTANDING: MOU-95-01**  
Random Substance Abuse Testing Representation

Jayne Faria, President  
ATU Local 1555  
132 Ninth Street, Suite 100  
Oakland, CA 94607  
Milt Waalkens, President  
UPE Local 790  
100 Oak Street  
Oakland, Ca 94607

**RE: Memorandum of Understanding (MOU #95-01) Random  
Substance Abuse Testing Representation**

Dear Ms. Faria and Mr. Waalkens:

It is mutually agreed between the District and United Public Employees Local 790 and Amalgamated Transit Union Local 1555 that:

1. Employees notified and scheduled for random testing shall be entitled to Union Representation upon verbal or written request only.
2. If Union representation is requested, it shall be provided within one hour at the test site. If the representation is not provided at the test site within that one hour, the District may proceed with the random drug testing without the representative.
3. If the requested representative appears within the one-hour time period, the representative will provide consultation and representation to the employee requesting representation. The representative will not impede the substance abuse testing and will leave the test site and/or return to work, when the employee requesting representation consents to take the test.
4. Any party may notify the other parties of its intent to terminate the MOU with five (5) working days notice. Within the five (5) working day notice period, the parties shall meet to attempt to resolve the disputes or differences that give rise to the intent to terminate. If the parties cannot resolve the disputes or differences, the MOU terminates after the expiration of the five (5) days and the parties revert to their previously held positions. If the MOU is terminated, the parties preserve their rights to arbitrate the original grievances #95-6-018 and #95-007

5. This MOU is non-precedent setting and the parties shall not assert, claim or argue its contents as a beneficial practice in any subsequent arbitration or other proceeding.

CONCUR FOR DISTRICT:

CONCUR FOR ATU:

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Larry A. Williams  
AGM-Administration

---

Jayne Faria  
President, ATU Local 1555

---

Milt E. Waalkens  
President, UPE Local 790

cc:J.T. Gallagher  
P. Oversier  
F. Stephens  
M. Settles  
H. Lewis  
B. George  
B. Jackson

December 12, 1995

**MEMORANDUM OF UNDERSTANDING: SEIU/MOU-044-8**

Mr. Milt Waalkens, President  
Service Employees International Union, Local 790  
100 Oak Street  
Oakland, CA 94607

**Subject: Resolution of Service Workers Upgrade to Foreworker II Position(s)**

Dear Mr. Waalkens:

This letter is to confirm the understanding reached on November 22, 1995 between the District and Service Employees International Union, Local 790 regarding resolution of the above subject. The parties agreed to the following:

1. The System Service Workers (based on seniority) will be upgraded to Foreworker II positions and compensated at the Foreworker II rate of pay. The upgrades shall occur when the Foreworkers are on their rest days off (RDOs).
2. When System Service Workers (based on seniority) are upgraded to Foreworker II positions, they are expected to perform the following functions:
  - a. Receive System Service Workers check-in calls;
  - b. Fax TARS crew sheets, as required;
  - c. Fax other reports, as required;
  - d. Handle emergency calls, as required; and
  - e. Fill vacancy shifts relative to sick leave/vacation shifts.
3. Upon the completion of the above mentioned administrative functions, the System Service Worker will perform their regular System Service Worker job duties.
4. The District has also agreed to compensate those System Service Workers who would have been eligible for this upgrade from May 3, 1993 through the effective date of this Agreement. The District and Union representatives will work together in determining the names of eligible employees.

This Memorandum of Understanding is applicable only to the System Service Workers represented by Service Employees International Union, Local 790 in the Transportation/ System Service Department. Furthermore, this Agreement is non-precedent setting and any issues associated with, or resulting from, the issues addressed herein are not grievable.

When signed below, this will represent the understanding of the parties for the life of the Agreement (1994-1997).

Concur for District:

Concur for Union:

\_\_\_\_\_  
Paul Oversier  
Chief Transportation Officer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Milt Waalkens  
President, BART Chapter  
SEIU Local 790

\_\_\_\_\_  
Date

\_\_\_\_\_  
Howard W. Lewis  
Manager of Labor Relations

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joe Burrell  
Chief Steward, System Service

\_\_\_\_\_  
Date

PO: AHJ: pkj

cc: ACTO's/ R. Crespo/ H. Lewis/ A. Johnson/ R. Jordan/ S. Wong

January 18, 1996

**MEMORANDUM OF UNDERSTANDING: SEIU/MOU 049-8**

Mr. Milt Waalkens  
President/BART Chapter  
Service Employees International Union Local 790  
100 Oak Street  
Oakland, CA 94604

Dear Mr. Waalkens:

This shall represent the parties, i.e., the San Francisco Bay Area Rapid Transit District ("The District") and the Service Employees International Union Local 790 ("SEIU 790"), understanding regarding the Foreworker Evaluation Committee.

The parties agree to administer Section 24.6 of the District and SEIU 790 Collective Bargaining Agreement ("CBA") in accordance with the changes contained herein and this M.O.U. shall be in effect until it expires on June 30, 1997.

The changes, in the administration of Section 24.6, agreed to by the parties are indicated:

- The current composition of the committee shall be changed by adding one additional person from the Foreworker classification to be designated by the Union.
- The minimum requirements on the Foreworker position description posting shall be changed to indicate a person must have completed Step 7 in the MWIII Step Progression System. In classifications where candidates do not come from the Maintenance Worker Step Progression System, a minimum of three years' BART experience will be required. This provision is not applicable to posting numbers 96-365, 96-366, and 96-368.
- In an effort to promote the perception of openness and inclusiveness related to the selection process, SEIU Local 790 President may appoint a non-voting silent observer to attend the selection interviews.
- The following point distribution system will be utilized by the Foreworker Evaluation Committee in conducting interviews and evaluating candidates.

	<u>Category</u>	<u>Point Range</u>
a.	Years of Job Related Experience (1 point per year)	0-10
b.	Verifiable Supervisory Experience (1 point for each 6 months)	0-10
c.	Job Related Education (1 point for each 16 units)	0-5
d.	Technical Knowledge	0-15
e.	Ability to Read and Write Effectively	0-15
f.	Ability to Effectively Communicate Verbally	0-15
g.	Ability to Analyze Problems, Make Decisions and Direct a Work Force	0-20
h.	Dependability	0-10
i.	Total Score	100

Materials utilized to evaluate candidates shall be kept in strict confidence. However, upon request an interviewed candidate may review his/her individual average score(s) in each of the above categories. The years of job related experience and verifiable supervisory experience, categories a & b, shall be years of experience working either within or outside the District. In accordance with the minutes clarification to Section 24.6 of the contract, by copy of this M.O.U., the Union is advised of the changes in point ranges for these categories.

With exception of these changes, no other changes are intended or required. The committee shall continue to function as it has in the past.

The signatures of the parties below confirm and secure the parties' understanding regarding the Foreworker Evaluation Committee.

Sincerely,

Howard W. Lewis  
Manager, Labor Relations

Concur for District:

Concur for SEIU 790:

\_\_\_\_\_  
Howard W. Lewis  
Manager, Labor Relations

\_\_\_\_\_  
Date

\_\_\_\_\_  
Milt Waalkens  
President

\_\_\_\_\_  
Date

\_\_\_\_\_  
Fred Stephens  
Department Manager, RS&S

\_\_\_\_\_  
Date

\_\_\_\_\_  
Dennis Kaczor  
Vice President

\_\_\_\_\_  
Date

\_\_\_\_\_  
Jim Dunn  
Department Manager  
Maintenance & Engineering

\_\_\_\_\_  
Date

\_\_\_\_\_  
John Maher  
Vice President

\_\_\_\_\_  
Date

March 12, 1997

**MEMORANDUM OF UNDERSTANDING: SEIU/MOU 047-8**

Mr. Dennis Kaczor  
 President/BART Chapter  
 Service Employees International Union, Local 790  
 100 Oak Street  
 Oakland, CA 94607

**Subject: Modification to Memorandum of Understanding 007-4**

Dear Mr. Kaczor:

In preparation for increased service levels, it is agreed that Memorandum of Understanding UPE/MOU 007-4 (4-10 Work Week Plan) will be modified as follows:

Effective April 1, 1997, the District may establish and staff Mainline Technician positions with a five (5) day per week, eight (8) hour per day work schedule, as long as the number of 4-10 plan Mainline Technician positions does not fall below fourteen (14).

All other provisions of UPE/MOU 007-4 remain in effect.

Concur for District:

Concur for Union:

\_\_\_\_\_  
 Howard W. Lewis                      Date  
 Manager of Labor Relations

\_\_\_\_\_  
 Dennis Kaczor                      Date  
 President, BART Chapter  
 SEIU Local 790

\_\_\_\_\_  
 Fred Stephens                      Date  
 Rolling Stocks and Shops Manager

\_\_\_\_\_  
 Dennis Jones                      Date  
 Chief Union Steward,  
 SEIU Local 790

July 1, 1997

**MEMORANDUM OF UNDERSTANDING: GEN/MOU-8-1**  
Flexible Spending Account Program

Mr. Robert Smith, President/Business Agent  
Amalgamated Transit Union, Local 1555  
132 Ninth Street  
Oakland, CA 94607

Mr. Michael Haberberger, Business Agent  
Service Employees International Union, Local 790  
100 Oak Street  
Oakland, CA 94607

Re: Flexible Spending Account Program

Dear Mr. Smith and Mr. Haberberger:

The parties agree to meet within the term of the Agreement (July 1, 1997 to June 30, 2001) to discuss the concept of creating a Flexible Spending Account Program that would allow employees to set aside pre-tax dollars to pay for dependent care and unreimbursed health care expenses in accordance with Internal Revenue Code (IRC) provisions.

CONCUR FOR DISTRICT:

CONCUR FOR UNION:

\_\_\_\_\_  
Howard W. Lewis                      Date  
Manager of Labor Relations

\_\_\_\_\_  
Robert Smith                      Date  
President/Business Agent  
ATU Local 1555

\_\_\_\_\_  
Michael Settles                      Date  
Department Manager

\_\_\_\_\_  
Michael Haberberger                      Date

September 4, 2002

**MEMORANDUM OF UNDERSTANDING No. 062-1** (formerly 062-2)

Ms. Roxanne Sanchez

Ms. Sue Angeli

Dear Ms. Sanchez and Ms. Angeli:

This MOU represents the parties agreement as to how the ABF process and RIF language are harmonized within the Maintenance Subunit and the manner in which a reduction in force is otherwise to be carried out within the various subunits of the bargaining unit.

**I. MAINTENANCE SUBUNIT**

The reduction in force process will be as follows for those reductions in force initiated in the Maintenance Subunit:

- A. The District will give the Union at least seven (7) days prior notice of any District intention to redline (i.e. freeze) or abolish a position. The District shall also post such notice in accordance with the Advance Bid Form procedure. The District's delivery of such posting to the Union, by fax or otherwise, shall constitute one of the acceptable forms of the notice required under this subsection A.
- B. After seven (7) days the District will conduct a bid in accordance with the ABF within the classification in which the position(s) eliminated in the RIF exist. However, the implementation of such bid may be delayed until employees displaced by the elimination of positions have been laid off or have bumped to other positions, whichever applies.
- C. After the bid is complete employees who have not successfully bid due to insufficient seniority may be given notice of layoff or potential layoff by the District. Such notice may be delivered in person to the employee or by certified mail or courier to the employee's address in the employee's file in the Human Resources Department. On the same day it is delivered or sent to the employee the District will deliver a copy of the notice to the Union, by fax, in-person delivery, e-mail, or by certified mail or courier.
- D. Employees who are given a notice of potential layoff will have two business days (M-F, excluding contractual holidays and regular days off) to respond to such notice as instructed in that notice. (Copy of sample notice attached hereto as attachment A).

- E. District representatives, union representatives, and employees receiving notice of potential layoff will meet jointly and promptly after expiration of the second business day referred to above. Such meeting shall be held at a reasonable time and location designated by the District. A "reasonable time and location" takes into account the number of employees affected whose bumping preferences must be simultaneously analyzed, the need to process layoffs in the most expeditious manner possible and the reasonable limitations on the Union's and District's availability. If the Union is not reasonably available, the meeting with the employee will go on without the Union's participation. (Example: if ten (10) employees in the affected subunit receive notice of potential layoff a meeting would normally be held within two (2) business days following the conclusion of the initial two (2) day response period mentioned above. If twenty (20) employees within the affected subunit are being simultaneously processed it would be reasonable to hold two meetings within four (4) business days to process these employees., etc. etc.)
- F. At the meeting(s) described in E above the following steps will occur:
- First, the employee and/or the Union (if authorized in writing in advance by the employee) will identify those classifications for which the employee or union believes the employee is qualified to bump.
  - Second, after making such verification inquiries as it deems necessary, the District will identify those classifications for which it believes the employee is qualified to bump.
  - Third, the employee will identify his or her prioritized preferences among the classifications into which the District has determined he or she is qualified to bump and the positions within those classifications for which he or she is eligible subject to the vacancy-first rule under section 25.2.C.1 of the labor agreement and seniority. However, disputes that remain concerning whether an employee is actually qualified to bump into a classification into which he or she or the union has asserted that the employee has the right to bump may be grieved if the employee is denied a preferred bump as a result of such determination.
- G. When the steps in F are concluded and the District is ready to implement such steps, the District may issue additional notices of potential layoff (to be processed in the manner described above), layoff notice (if the affected employee has no remaining bumping

options), or a bump notice indicating the position into which the employee will bump, as appropriate.

- H. Once all employees affected by the Reduction in Force have been laid off or bumped, a rebid will be conducted in each classification subject to the ABF except classifications in which the reduction in force process was initiated where a rebid has already taken place.

## **II. CLERICAL SUBUNIT (Including Professional Chapter)**

The reduction in force process will be as follows for those reductions in force initiated in the Clerical Subunit and Professional Chapter:

- A. The District will give the Union at least seven (7) days prior notice of any District intention to redline (i.e. freeze) or abolish a position when it is contemplating a reduction in force. The District may deliver such notice to the Union by fax or otherwise.
- B. After the seven (7) days the District may give a notice of layoff or potential layoff to an employee(s) whose positions is being eliminated. Such notice may be delivered in person to the employee or by certified mail or courier to the employee's address in the employee's file in the Human Resources Department. On the same day it is delivered or sent to the employee the District will also deliver a copy of the notice to the Union, by fax, in-person delivery, e-mail, or by certified mail or courier.
- C. Employees who are given a notice of potential layoff will have two business days (M-F, excluding contractual holidays and regular days off) to respond to such notice as instructed in that notice. (Copy of sample notice attached hereto as attachment A).
- D. District representatives, union representatives, and employees receiving notice of potential layoff will meet jointly and promptly after expiration of the second business day referred to above. Such meeting shall be held at a reasonable time and location designated by the District. A "reasonable time and location" takes into account the of number of employees affected whose bumping preferences must be simultaneously analyzed, the need to process layoffs in the most expeditious manner possible and the reasonable limitations on the Union's and District's availability. If the Union is not reasonably available, the meeting with the employee will go on without the Union's participation. (Example: if ten (10) employees in the affected subunit receive notice of potential layoff a meeting would normally be held within two (2) business days following the conclusion of the initial two (2) day response period mentioned above. If twenty (20)

employees within the affected subunit are being simultaneously processed it would be reasonable to hold two meetings within four (4) business days to process these employees., etc. etc.)

- E. At the meeting(s) described in D above the following steps will occur:
- First, the employee and/or the Union (if authorized in writing in advance by the employee) will identify those classifications for which the employee or union believes the employee is qualified to bump.
  - Second, after making such verification inquiries as it deems necessary, the District will identify those classifications for which it believes the employee is qualified to bump.
  - Third, the employee will identify his or her prioritized preferences among the classifications into which the District has determined he or she is qualified to bump and the positions within those classifications for which he or she is eligible in light of seniority. However, disputes that remain concerning whether an employee is actually qualified to bump into a classification into which he or she or the union has asserted that the employee has the right to bump may be grieved if the employee is denied a preferred bump as a result of such determination.
- F. When the steps in E are concluded and the District is ready to implement such steps, the District may issue additional notices of potential layoff (to be processed in the manner described above), layoff notice (if the affected employee has no remaining bumping options), or a bump notice indicating the position into which the employee will bump, as appropriate.

### **III. General Provisions**

1. If a conflict arises between an interpretation of this MOU and an interpretation of the labor contract, the interpretation under this MOU shall control. However, nothing herein shall be applied or construed in a manner that impairs the protections provided in section 17.7.C of the 2005-09 agreement.
2. This MOU represents the entire agreement between the parties regarding this subject matter and supersedes any other such previous agreements addressing this subject matter. Any amendments must be in writing and executed by both parties.
3. This Memorandum of Understanding (MOU) between the District and the Union is binding on the parties, effective September 4, 2002.

Done this day, \_\_\_\_\_, 2002.

For the District:

For the Union:

\_\_\_\_\_  
Darrell Murray

\_\_\_\_\_  
Roxanne Sanchez

\_\_\_\_\_  
Bud Brandenberger

\_\_\_\_\_  
Ray Quan

\_\_\_\_\_  
Suzanne Angeli

ATTACHMENT A – MOU 062-1 (formerly 062-2)

Employee Name \_\_\_\_\_ Date: \_\_\_\_\_  
Employee Address \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**IMPORTANT**

**NOTICE OF POTENTIAL LAYOFF - PLEASE READ CAREFULLY AND DELIVER  
RESPONSE BY THE STATED DEADLINE**

Dear \_\_\_\_\_ (Employee):

As you know the District \_\_\_\_\_ (general factors precipitating the layoff). For that reason, the District has no alternative but to further reduce its workforce. The District tentatively believes that your position may be eliminated or that an employee with greater seniority may bump you from it.

To evaluate your bumping options, the District needs information concerning your qualifications and preferences so that it may properly implement the coming reduction in force. The enclosed forms are intended for that purpose. You may wish to contact your union representative for assistance in understanding, evaluating, and responding to these forms and the information they contain as it may apply to you. Once the District has this information, the Human Resources Department and the Union will analyze and determine your bumping options, if any. When this is concluded, you will receive a layoff notice (if you have no bumping options) or a notice informing you of the position into which you will bump in light of your seniority and preferences.

If you are terminated, you will be advised of the effective date, payroll information, and of resources available to assist you as you prepare to search for other employment. If a bump is involved, you will be advised of your new position, hours, supervisor and report location.

A meeting has been scheduled for \_\_\_\_\_ (time) in \_\_\_\_\_ (location) on \_\_\_\_\_ (date). You are directed to attend this meeting. At that time your union representative will assist you in evaluating the enclosed information and forms as they apply to

you. While at that meeting you will complete and sign the forms, along with your Union representative. These forms will then be reviewed for seniority and MQ's by Employment representatives who will then verify the qualifications and inform the employee of the position they have bumped.

Failure to properly complete the form or to turn them into the union at the meeting will adversely affect your employment options. If you are unable to attend this meeting due to illness or other emergency, your union representative may complete the form, sign, date and return it on your behalf. They will only do this if you notify one of them in advance of your desire that this be done. However, you will be bound by the union's actions.

Thank you for your continued patience and service in this difficult time.

Sincerely,

---

Department Manager

C: Michal Settles  
D'arcy Porter  
Wilbur Wong  
SEIU Local 790 Representative

Received:

---

Employee

Date:

---

ATTACHMENT B - SEIU MOU 062-1 (formerly 062-2)

**SEIU LOCAL 1021**  
**BART MAINTENANCE AND CLERICAL SUBUNIT QUALIFICATIONS AND**  
**INITIAL PREFERENCE FORM**

**Please carefully follow the instructions for filling out this form. Failure to do so, or failure to return it to your union representative as stated in the notice of reduction in force/potential layoff may adversely affect your employment opportunities at BART.**

The job classifications listed on page 2 are ones for which you appear to meet the minimum qualifications, based on information contained in your personnel file maintained by the Human Resources Department. Attached are the minimum qualifications and job titles for all jobs within your sub-unit (clerical or maintenance). Please review these and add any to the below list for which you believe you are qualified. If you add to the list, you must also establish that you have the qualifications that you claim. You may do so by relying on the information already in your Human Resources Department file. You may also attach additional documentation (e.g. diplomas, certificates, names of prior employers and jobs held, etc.) to your response. However, you must submit any documentation you wish to submit by the below deadline. Diplomas, certificates and other documentation must be verifiable.

When you have added any additional classifications you wish to add to the list, please fill out the preference information on page 3 of this form. **This form must be completed, signed, dated, returned to your union representative at the meeting described in the notice of reduction in force/layoff you received. You are encouraged to deliver your response in person.** Mailed responses that arrive after the delivery deadline will not be accepted.

Employees who deliver their responses in time will at the time of delivery be given a copy of the response, signed as received and dated by the Human Resources Department representative in attendance at the meeting. Employees who fail to respond by the deadline or who claim to have responded but who do not have a receipt will be deemed to qualify only for those classifications listed in the letter they received from the District.

Employees are encouraged to complete this form personally. However, if you are unable to respond for some reason, the District will accept a completed form from the union on your behalf as long as it is submitted by the deadline and clearly signed on your behalf by the union. It is your

responsibility to ensure that your union representative obtains a receipt and that he or she provides it to you. Replacement receipts will not be issued.

Classifications For Which You Meet Minimum Qualifications

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I believe that I meet the minimum qualifications for the following additional classifications (attach documentation):

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Employee Name  
(print): \_\_\_\_\_

Signature: \_\_\_\_\_ Employee Number: \_\_\_\_\_  
Employee (or union agent)

Date \_\_\_\_\_

Received \_\_\_\_\_ Date: \_\_\_\_\_  
Human Resources Department Representative

Designation of Preliminary Preferences  
Clerical and Maintenance Sub-units

1. Please list all of the job classifications that are listed on page 2, including those you have added, and indicate your preference for those classifications beginning with the most preferred (preference 1) and ending with your least preferred option.


2. Please indicate your preference for days off beginning with your most preferred day off (1) and ending with your least preferred day off (7):

Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

3. Please indicate your preference for shift beginning with your most preferred shift (1) and ending with your least preferred (4) shift:

<u>Night Shift</u>	(50% or more of the shift regularly falls between 0001 and 0800 hours)	
<u>Evening Shift</u>	(50% or more of the shift regularly falls between 1600 and 2400 hours)	
<u>Day Shift</u>	(50% or more of the shift regularly falls between 0800 and 1600 hours)	
<u>Relief Shift</u>	(multiple shift start times and work locations):	

4. Please identify any locations at which you prefer to work in order of most preferred to least preferred:


Employee Name (print): \_\_\_\_\_

Signature: \_\_\_\_\_ Employee  
Number: \_\_\_\_\_  
Employee (or union agent)

Date \_\_\_\_\_

Received \_\_\_\_\_ Date: \_\_\_\_\_  
Human Resources Department Representative

November 15, 2002

MEMORANDUM OF UNDERSTANDING: SEIU/MOU 063-3

Ms. Roxanne Sanchez  
President/BART Chapter  
Service Employees International Union, Local 790  
100 Oak Street  
Oakland, CA 94607-4586

Re: Memorandum of Understanding: SEIU/MOU 063-3  
Hayward "Back Shop" Probationary Period Reversion

Dear Ms. Sanchez:

Service Employees International Union, Local 790 and the San Francisco Bay Area Rapid Transit District agree that the Hayward "Back Shop" is different in the maintenance work performed than the Service and Inspection area of the Hayward Shop. To that end the Union and the District agree:

1. Section 26.2 promotion within the bargaining unit is applicable except that an employee who bids to the Back Shop via the Advance Bid Procedure may be returned by the District to their former position during 80 day probationary period that applies to the Back Shop position (or during any extension of such probationary period agreed upon under no. 5 below) if the employee fails to qualify based on the evaluation(s) of the relevant Employee Development Specialist.
2. This "forced" reversion in no way will disqualify the reverted employee from future Advanced Bids into the Back Shop if the employee qualifies through some form of learning that will demonstrate knowledge sufficient to complete the probationary period satisfactorily.
3. Any provision of the 2001-2005 Master Agreement by which the terms of this MOU conflict or are inconsistent shall be deemed waived for purposes of this MOU.
4. This Memorandum of Understanding will remain in full force and effect for the life of the present Agreement (2001-2005).
5. The parties may on a case by case basis and without precedent agree to extend the probationary period beyond the initial 80 days to a combined maximum of 180 days to permit a better evaluation of the

employee's ability to do the job. All agreements to extend the probationary period must be in writing and entered into in advance of the expiration of the probationary period by the Chief Steward, the Manager over the Back Shop or his/her designee, and the Labor Relations Manager and his or her designee.

- 6. This written MOU is the entire MOU between the parties. There are no promises, terms or conditions between the parties not expressed herein in writing.

CONCUR FOR THE DISTRICT:

CONCUR FOR THE UNION:

\_\_\_\_\_  
Darrell Murray                      Date  
Manager, Labor Relations

\_\_\_\_\_  
Roxanne Sanchez                      Date  
President/BART Chapter  
SEIU, Local 790

\_\_\_\_\_  
Bill McCoy                      Date  
Chief Mechanical Officer

\_\_\_\_\_  
Bud Brandenberger                      Date  
Vice President/BART Chapter  
SEIU, Local 790

\_\_\_\_\_  
Ray Quan                      Date  
Vice President/BART Chapter  
SEIU, Local 790

\_\_\_\_\_  
J. R. Thomas                      Date  
Chief Steward

April 2, 2003

Memorandum of Understanding: SEIU 062-2

### **A. Parties**

The parties to this Memorandum of Understanding (MOU) are the San Francisco Bay Area Rapid Transit District ("District") and SEIU Local 790 ("Union").

### **B. Background**

The parties are signatories to a 2001-05 collective bargaining agreement ("2001-05 agreement"). The District has recently experienced a reduction in force ("RIF"). A number of employees that were in the Union's bargaining unit were laid off during the FY03 RIF. The parties have met with the State Employment Development Department ("EDD") to discuss resources available for retraining workers who have been laid off. The EDD has identified funds available to retrain workers who have been laid off. The available funding can only be utilized to retrain currently laid off workers, and cannot be used to retrain currently employed workers. Workers who have been laid off who are placed in programs funded by such funding must be maintained in that program until the normal conclusion of their training. The parties mutually desire to mitigate the adverse effect that continued unemployment has on District employees who have been laid off. Therefore, they have adopted the following mutual understandings regarding the manner in which the 2001-05 agreement would apply to permit the placement in the elevator-escalator training program of laid off workers who have not been recalled.

### **C. Mutual Understandings**

The parties mutually understand that:

1. Employees who have been laid off from District employment and remain unemployed by the District may be offered vacant and available positions in the elevator-escalator training program before such positions are offered to active District employees; provided that such laid off employees must pass all tests and otherwise meet the qualifications for participation in the program.
2. If such a laid off employee declines an offer of employment in such a training position it shall not affect the employee's continuing recall rights under the agreement. However, no further offer of entry into the elevator-escalator training program shall be made while the employee is in inactive status.
3. If the laid off employee is offered such a training program position, and if he or she earned a wage rate higher than the 90% of

Maintenance Worker III trainee rate at the time of layoff, he or she shall be paid the higher rate while in the training program rather than the 90% trainee rate. However, the employee will not be entitled to across the board wage increases that occur prior to the normal conclusion of their training. Instead, they shall move to the then current MWIII rate upon conclusion of their training.

4. Until the normal conclusion of their training, such employees shall not be considered in any bumping process. They shall not be subject to being bumped from and shall not be permitted to bid out of the trainee position or accept an offer pursuant to listing on an eligibility pool list or other application and selection procedures.

#### D. Other Terms

1. The terms of this agreement shall not establish a precedent for the manner in which the 2001-05 labor agreement applies in other circumstances.
2. If any conflict or inconsistency arises between any term of this M.O.U. and any term of the 2001-05 agreement, the terms of this M.O.U. shall prevail. Except to the extent of such inconsistency or conflict, the terms of the 2001-05 agreement shall otherwise govern the terms of participation in and withdrawal from the elevator-escalator training program for trainees entering the program pursuant to this M.O.U.
3. This MOU shall be effective upon the signing by all parties below:

Done this day, April 2, 2003.

For the District:

For the Union:

---

Teresa E. Murphy      Date  
Assistant General Manager,  
Administration

---

Roxanne Sanchez      Date  
President  
BART Chapter, SEIU, Local 790

---

Bud Brandenberger      Date  
SEIU, Local 790

---

Ray Quan      Date  
SEIU, Local 790

**APPENDIX A**  
**JOB DESCRIPTIONS**

**BUILDINGS WORKER**

FC: MA310  
PG: MW-III

PC: 301  
BU: 01 (SEIU)  
Created: August 1987  
Revised: July 2009

**DEFINITION**

Under general supervision, performs a wide variety of skilled repair, maintenance and alteration of District buildings and related facilities including carpentry and cabinetry, plumbing, flooring, interior finishing and concrete work; performs related work as assigned.

**CLASS CHARACTERISTICS**

This is the journey level classification performing skilled building repair and maintenance. Incumbents work independently according to accepted standards of the trade, supervisory direction and District procedures and practices, and are expected to select appropriate tools, materials and approach to the work.

**EXAMPLES OF DUTIES**

1. Performs general wood working, builds and repairs stairs, fences, gates, decks, platforms, sheds and related; plans, designs and builds a variety of cabinets, cupboards and counter bases.
2. Constructs forms, sets rebar, pours and finishes concrete, aggregate and related paving.
3. Performs trenching, excavating, shoring and backfilling, repairs and installs supply and drainage pipe, repairs and maintains existing trackway and facilities drainage systems including fan room and vent drains, floor drains, trackway drains, wayside drains, and miscellaneous drainage systems.
4. Installs glass; frames walls and partitions; repairs and modifies furniture; measures, cuts, installs and repairs carpeting; installs, replaces and repairs linoleum; lays out, measures, installs, repairs, grouts and seals ceramic tile to include chemical grouting, caulking and sealant; repairs terrazzo flooring; installs hollow cable carrying floors.

5. Augers and clears pipes and drains; installs and repairs sinks, toilets, drinking fountains and related fixtures.
6. Performs general concrete work, operates jackhammer, ladder, backhoe, dump truck and cement truck; measures and levels grades for concrete work; performs general asphalt work, installs and repairs brick, cobblestone and masonry.
7. Installs and removes anchoring systems and mechanical fasteners, hangs, frames and adjusts doors and window frames; repairs trackway doors located in tunnels and the Transbay Tube.
8. Hangs sheetrock, tapes and textures walls; installs paneling; installs and repairs suspended ceilings, acoustical tiles and cement ceilings; installs metal stud, vinyl/clip and modular walls and partitions; removes graffiti found throughout the District.
9. Estimates quantities of materials required; determines and gathers necessary tools, supplies and equipment; reads and interprets blueprints and diagrams.
10. May design, layout and diagram work to be performed; discusses work to be performed with Foreworker, requester or others.
11. Calculates and measures quantities, angles, lengths, sizes, etc.
12. Loads and unloads material and equipment; drives District vehicles to job sites.
13. Caulks seams, joints and cracks; cuts, shapes, applies and installs laminates, formica, plastics and related; operates and uses power tools and performs bobcat operations.
14. Removes and installs glass windows, installs temporary shielding over openings, installs removes repairs and maintains thermoplastic stripes.
15. Performs rodent and insect mitigation at all stations, structures girders, columns, and substation areas; maintains stock materials, tools, equipment and inventory; maintains records of work performed, materials used and related.

## **QUALIFICATIONS**

### **Knowledge of:**

Methods, materials, tools and equipment used in carpentry, plumbing, concrete, brick and masonry work, interior finishing and glass installation. Methods and techniques of estimating materials and supply quantities. Mathematics for calculating and measuring distance, length, volume and angles. Use and maintenance of hand and power tools common to the trade. Safety practices and procedures.

### **Skill in:**

Performing skilled carpentry, forming and cabinetry. Installing and repairing plumbing, piping and plumbing-related fixtures. Installing, taping, texturing and finishing sheetrock and plaster wall surfaces. Using and maintaining hand and power tools common to the trade. Operating backhoes, loaders, jackhammers, cement mixers and dump trucks. Reading and interpreting blueprints, diagrams and manuals. Calculating and measuring quantities, distance, volume and angles. Communicating effectively with those contacted in the course of the work. Keeping simple written records.

## **MINIMUM QUALIFICATIONS**

### **Education:**

Completion of an apprenticeship in building maintenance and repair.

### **Experience:**

One (1) year of journey level experience in building repair and construction.

### **Other Requirements:**

Must possess a valid California driver's license and have a satisfactory driving record; must be willing to work underground and at heights to thirty feet; must have physical ability to climb, stoop and crawl to reach work and lift and carry up to 100 pounds.

**ELECTRICAL HELPER**

FC:  
PG: MW-I  
FLSA: Non-Exempt

PC: 151  
BU: 01 (SEIU)  
Created: August 2009

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

**DEFINITION**

Under general supervision, performs a variety of semi-skilled mechanical and electrical maintenance repair work of the District facilities, trackways and related appurtenances; and performs related duties as assigned.

**CLASS CHARACTERISTICS**

Incumbents in this class will normally work in a small crew setting to perform a variety of work in the preventative maintenance and repair of the District's trackways and facilities throughout the system. This class is distinguished from the Electrician in that the work of the latter class requires knowledge and experience in performing tasks related to electricity, completion of an apprenticeship in the electrical trade, as well as one year of journey level work experience.

**REPORTS TO**

This position reports to the Electrical Foreworker.

**EXAMPLES OF DUTIES – Duties may include, but are not limited to, the following:**

1. Receives daily work assignments from shift Foreworker.
2. Performs physical work in District facilities and the trackway including aerial, grade and subway environments.
3. Re-lamps lighting fixtures; cleans and/or replaces lens.
4. Carries and stages materials, supplies, and tools required for work to specified locations, using District vehicles.
5. Arranges, stages and organizes parts and materials in shop environment.
6. Maintains tools, equipment and worksite in a neat and orderly condition.

7. Performs measurements and marking required for drilling, clamping, and positioning material and equipment for proper installation.
8. Cleans 3rd rail insulators.
9. Performs installation of material such as coverboard bracket, braces, bolts, clips, pins coverboard, shields, or insulation with tools including wrenches, screwdrivers, sockets, torque wrenches, drills, saws, and other hand and power tools.
10. Reports unusual incidents and the need for additional maintenance or repair to Foreworker.
11. Keeps trucks assigned to electrical/mechanical section clean: keep truck supplies and tools on trucks in good order.
12. Drives trucks and mobile equipment related to electrical maintenance work.

## **QUALIFICATIONS**

### **Knowledge of:**

Trackway appurtenance maintenance procedures, methods, supplies, tools and equipment. Proper use and care of hand and power tools and equipment. Safe working practices and techniques.

### **Skill in:**

Using hand tools and power equipment to perform semi-skilled trackway maintenance and repair work. Following oral and written directions. Working cooperatively with others in a crew.

## **MINIMUM QUALIFICATIONS**

### **Education:**

Possession of a high school diploma, GED, or recognized equivalent.

### **Experience:**

One (1) year of (full-time equivalent) verifiable general maintenance or heavy labor experience which will have provided a familiarity with semi-skilled mechanical and/or electrical equipment, tools and procedures.

**Other Requirements:**

Must possess a valid California Class C driver's license and have a satisfactory driving record. Must be physically able to perform strenuous physical labor both indoors/outdoors in all types of weather. Must be physically able to momentarily lift 50 lbs to waist, various shaped materials and equipment. Must be physically able to walk, climb, stoop, bend, crawl, twist, work in confined spaces, work underground, and walk on uneven surfaces. Must be physically able to climb and work from a ladder at a height of 20 feet. Must be physically able to climb into vehicles with steps up to 25'' from the ground in close clearances. Must be able to wear respiratory and fall protective equipment during the performance of assigned duties in accordance with the District Respirator Program and applicable Cal-OSHA requirements and work in dusty work environment subject to various fumes and noise levels per applicable Cal-OSHA requirements. Must be able to understand, read, write, and communicate effectively in English.

**WORKING CONDITIONS****Environmental Conditions:**

Field, shop, or construction site environment; exposure to dust, noises, fumes, heat, cold, confined spaces, heights, underground, moving vehicle, electrical energy and inclement weather conditions.

**Physical Conditions:**

Requires maintaining physical condition necessary for performing strenuous labor; lifting and carrying various material and equipment; walking, climbing, stooping, bending, crawling, twisting, working in confined spaces, underground, and heights, walking on uneven surfaces; and working from a ladder; climbing in and out of vehicles; and wearing respiratory and fall protective equipment according to District, State, and Federal requirements.

**EEOC: 08**

**Safety Sensitive Designation: Yes**

## QUALITY TEAM LEADER

JC: 000035  
PG: QTL

PC: 313  
BU: 01 (SEIU)  
Created: June 2009

### DEFINITION

Under general supervision, acts as a working team lead for a scheduled maintenance team, performs skilled preventive maintenance, troubleshooting, primary and secondary repair, and modification to electrical, electronic, electro-mechanical, mechanical, pneumatic, hydraulic and HVAC equipment and components found in revenue vehicles and supporting systems; inspects work performed, and conducts vendor source inspections; ensures revenue vehicles meet quality standards prior to release for revenue service; performs related work assigned.

### CLASS CHARACTERISTICS

This is a journey level classification performing skilled preventive maintenance, troubleshooting, primary and secondary repair and modification to electrical, electronic, electro-mechanical, mechanical, pneumatic, hydraulic and HVAC equipment and components found in District's revenue vehicles and supporting systems. Incumbent works as a lead on a scheduled maintenance team, performing maintenance tasks, coaching team members, checking quality of work performed by team, acts as a liaison between the team and management, engineering, stores, logistics and training.

### EXAMPLES OF DUTIES

1. Acts as a liaison between the maintenance team members, foreworkers, management, engineering, stores, logistics and training ensure that all maintenance and repair tasks are properly complete before releasing a vehicle for revenue service.
2. Coordinates and monitors District maintenance team performance of all scheduled maintenance and repair work on revenue vehicles and supporting systems.
3. Performs scheduled maintenance and testing and repair of

mechanical, electro-mechanical, pneumatic, hydraulic, HVAC, and electronic components and systems of transit vehicles; troubleshoots and performs primary maintenance on such systems.

4. Troubleshoots and performs secondary maintenance and repair on all transit vehicle system components; including but not limited to mechanical, electro-mechanical, pneumatic, hydraulic, HVAC, and electronic and solid state devices.
5. Repairs transit vehicles; including but not limited to unscheduled failure, accident and in-service running repairs to enable vehicles to be returned to revenue service.
6. Ensures that revenue vehicles meet quality standards prior to release for revenue service.
7. Performs modifications to revenue vehicles as directed by engineering and supervisory staff; suggests improvements and works with engineering and other maintenance staff regarding modifications.
8. Uses diagnostic test equipment and precision measuring devices in the course of the work; verifies performance of new or modified systems or equipment; may fabricate new test equipment as required.
9. Reads and interprets electronic, pneumatic, hydraulic and refrigerant schematics and diagrams, engineering drawings, manuals, and work orders;
10. Measures, tests and inspects completed work to confirm adherence to specifications.
11. Uses shop equipment such as a wheel press, lathe, milling machines, welding equipment, soldering, electric and electronic test devices and mechanical tools to repair vehicles and components.
12. Performs the refueling of hi rail vehicles when necessary to meet operational needs.
13. Documents and records work performed and parts and materials used; follows specified District and Safety procedures; communicates needed information effectively.

## **QUALIFICATIONS**

### **Knowledge of:**

Electrical, electronic, hydraulic, pneumatic, and refrigerant symbols needed to read and use all documentation for the maintenance, repair and installation of all related revenue vehicle equipment and components.

Safety practices and procedures.

Basic math skills as required for the work.

### **Skill in:**

Identifying basic facts and terms of electrical/electronic and electro-mechanical principles and theories and how they relate to revenue vehicle systems.

Inspecting, testing and measuring revenue vehicle parts, equipment, components and systems for adherence to specifications, procedures and standards.

Use of mechanical, hand, power, electrical and electronic tools and troubleshooting devices and troubleshooting and diagnostic techniques.

Repairing and installing railcar equipment and components on the basis of written material, drawings, schematics and wiring diagrams, operational manuals and procedures, and manufacturer's instructions.

Identifying and correcting routine electrical/electronic and electro-mechanical problems.

Selecting and using correct parts, tools and test equipment to perform scheduled and unscheduled maintenance required to maintain revenue vehicle systems, components and support equipment.

Establishing and maintaining effective working relationships with those contacted in the course of the work.

Communicate clearly and concisely both orally and in writing.

Leading effectively in a team environment.

Coaching and mentoring.

## **MINIMUM QUALIFICATIONS**

### **Education:**

Graduation from high school and completion of accredited post secondary school certification program in electricity, electronics, electro-mechanics or related field.

### **Experience:**

Two (2) years of verifiable experience in the maintenance and repair of rail vehicle, aviation, or automobiles, including electro-mechanical and electronic elements.

**Substitution:**

Two (2) or more years of military experience in an electronics/electro-mechanical discipline with an honorable discharge may be substituted for the post secondary school accredited certification program in electricity, electronics, electro-mechanics or related field.

**Other Requirements:**

Must be physically capable of working in confining work spaces and lifting equipment weighing up to 70 pounds; must be willing to work weekends, holidays, off hours shifts and occasional emergency overtime.

**Work Conditions and Environmental Factors:**

This position is characterized by moderate risks or discomforts, which are partially controlled by special precautions, and/or is subject to periodic uncontrollable work schedules.

**STRUCTURES WORKER**

FC: MA635

PG: MWII

PC: 201

BU: 01(SEIU)

Created: December 1989

Revised: July 2009

**DEFINITION**

Under general supervision, performs a variety of semi-skilled structural maintenance, repair and modification activities involving sub-stations, retaining walls, trenches, vent housings, tunnels, aerial structures and rights-of-way; performs related work as assigned.

**CLASS CHARACTERISTICS**

Incumbents in this class normally work in a small crew setting and on off-hours shifts to perform varied physical work in the maintenance of varied concrete and related structures underground and above-ground in locations throughout the system. This class is distinguished from the skilled craft classes in that the work of the latter classes normally require the equivalent of completion of an apprenticeship in a designated craft area for successful work performance.

**EXAMPLES OF DUTIES**

1. Receives daily work assignments from shift foreworker.
2. Selects necessary tools, equipment and materials; travels to assigned work sites; cleans and clears debris, weeds, shrubbery, dead animals and other trash and obstructions from tunnels, rights-of-ways, drains, grates and similar locations.
3. Drains standing water or water seepage using hand or power pumps, trenching, excavation and backfill, general concrete work, caulking, mortar or other filler materials following manufacturer's instructions.
4. Breaks out existing concrete, asphalt or other surfaces using hand or power equipment.
5. Excavates and grades areas for proper configuration or drainage; floors or other surfaces per manufacturers instructions.
6. General asphalt work, installation and removal of anchoring systems not requiring welding general wood working, applying crack sealants and waterproofing.

7. Performs regular maintenance and repair of track doorways located in tunnels and the Transbay Tube, repairs and maintains existing trackway and facilities drainage systems including fan rooms and vent drains, floor drains, trackway drains, wayside drains, and miscellaneous drainage systems; removal of graffiti, paint preparation.
8. Uses various power tools, including bobcat operations, performs roofing installation and maintenance, concrete spall removal and repair, platform, windows and general glass work.
10. Installation and maintenance of thermoplastic stripes throughout the District; rodent and insect mitigation.
11. Reads diagrams and specifications to determine appropriate measurements; erects wooden forms or supporting structures for concrete work, pours and finishes concrete for retaining walls, walkways, etc.; applies and finishes asphalt surfaces as required.
12. Erects, dismantles and works from scaffolding as required; places and dismantles shoring in underground trenches.
13. Cleans up work site after completion of assigned work; maintains tools and equipment in a clean and orderly condition; reports the need for additional maintenance or repair to foreworker.

## **QUALIFICATIONS**

### **Knowledge of:**

Structures maintenance procedures, methods, supplies, tools and equipment. Proper use and care of hand and power tools and equipment. Safe working practices and techniques, particularly in underground situations. Excavating and shoring practices and techniques.

### **Skill in:**

Using hand tools and power equipment to perform semi-skilled concrete, asphalt and related structures maintenance work. Following oral and written directions. Working independently without immediate supervision. Working cooperatively with others in a crew. Reading and working from blueprints, drawings and schematics.

**SYSTEM SERVICE WORKER**

FC: MA400

PC: 111

PG: UW

BU: 01

Created: March 1992

Revised: July 2009

**DEFINITION**

Under general supervision, performs a variety of janitorial duties in maintaining District stations, shops and offices in a clean and orderly condition; performs related work as assigned.

**CLASS CHARACTERISTICS**

This class is distinguished from the Utility Worker classification in that the janitorial duties are generally performed in District stations, shops and offices.

**EXAMPLES OF DUTIES**

1. Receives daily work assignments from appropriate supervisor; assembles necessary cleaning equipment, materials, supplies, cleaning solutions and required protective gear; travels to assigned work site.
2. Maintains District stations in a clean and orderly condition by sweeping, scrubbing, waxing and cleaning floors, cleaning and polishing elevators, escalators, ticket machines, gates and fixtures, washing windows and windbreakers and emptying trash containers.
3. Clears leaves, trash and debris; sweeps and cleans walkways, patios and sidewalks from the station to the street and all bus stops on District property.
4. Cleans District office areas by vacuuming floors, carpets and upholstery, shampooing carpets and upholstery, emptying ashtrays and trash cans, dusting and washing chairs, desks, files and other surfaces and washing walls and doors.
5. Cleans and disinfects restroom surfaces and fixtures using detergents and chemicals; restocks restrooms with services supplies such as soap and paper goods.
6. Performs heavy cleaning in shop areas, including service pits, truck bays and docks and floor areas, ensuring that debris and grease are removed.

7. In employee lunchroom areas, cleans sink, stove, refrigerator and tables in addition to floor and wall areas; steam cleans tools or parts as may be required.
8. Documents work performed; notifies crew leader or supervisor of required maintenance.
9. Responds to urgent cleanup in parking lots, garages, trains, offices, and stations as required; and performs heavy cleaning in yards and shops.

### **QUALIFICATIONS**

#### **Knowledge of:**

Janitorial procedures, methods, supplies, tools and equipment. Safe working practices and techniques.

#### **Skill in:**

Using hand tools and power equipment to vacuum, scrub, strip, wax, buff, shampoo, and otherwise clean varied surfaces and fixtures. Using detergents and cleaning solutions correctly and safely. Following oral and written directions. Working independently without immediate supervision. Working cooperatively with others; responding appropriately to patron questions. Maintaining accurate basic logs and records of work performed.

### **MINIMUM QUALIFICATIONS**

A typical way of gaining the knowledge and skills outlined above is:

#### **Education:**

Equivalent to completion of the twelfth grade.

#### **Experience:**

One year of experience which will have provided a familiarity with industrial janitorial procedures, equipment and supplies.

#### **Other Requirements:**

Must possess a valid California driver's license and have a satisfactory driving record. Must have physical capability to perform strenuous physical labor, including sufficient strength to lift trash containers and equipment weighing up to 50 pounds. Must be willing to work weekends and off-hours shifts.

## TRACK WORKER

FC: MA660

PC: 201

PG: MW-II

BU: 01 (SEIU)

FLSA: Non-Exempt

Created: April 1988

Revised: November 29, 2007

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

### DEFINITION

Under general supervision, performs a variety of semi-skilled maintenance, repair and modification activities involving trackage and related appurtenances; and performs related duties as assigned.

### CLASS CHARACTERISTICS

Incumbents in this class normally work in a small crew setting and on off-hours shifts to perform varied physical work in the preventive maintenance and repair of heavy rails and related equipment in locations throughout the system. This class is distinguished from the skilled craft classes in that the work of the latter classes normally require the equivalent of completion of an apprenticeship in a designated craft area for successful work performance.

### REPORTS TO

**This position reports to the Track Foreworker who assigns work and administers the first step of disciplinary procedure, and to the Section Manager, Track Maintenance who implements major personnel decisions such as hiring and termination.**

**EXAMPLES OF DUTIES** – *Duties may include, but are not limited to, the following:*

1. Receives daily work assignments from shift foreworker.
2. Selects and gathers necessary hand and power tools, equipment and materials from storage, using a dolly or forklift as required.
3. Loads and unloads tools and equipment from gang truck or buggies.
4. Travels to assigned work sites.

5. Cleans and clears debris, weeds, shrubbery, dead animals and other trash and obstructions from track and associated wayside.
6. Performs scheduled preventive maintenance such as cleaning and lubricating track fastenings and switches and tightening torque and anchor bolts.
7. Installs, removes and replaces track fastenings, concrete and wooden ties, angle bars and joints, switches and rails, including turnouts.
8. Assists in resurfacing and realigning tracks, gauges tracks rails as required.
9. Cuts and removes vegetation within Right of Way.
10. Reads diagrams and specifications to determine appropriate measurements.
11. Cleans up work site after completion of assigned work
12. Maintains tools and equipment in a clean and orderly condition.
13. Reports unusual incidence and the need for additional maintenance or repair to Foreworker.

## **QUALIFICATIONS**

### **Knowledge of:**

Track and related appurtenance maintenance procedures, methods, supplies, tools and equipment. Proper use and care of hand and power tools and equipment. Safe working practices and techniques.

### **Skill in:**

Using hand tools and power equipment to perform semi-skilled track maintenance repair work, and vegetation cutting and removal. Following oral and written directions. Working independently without immediate supervision. Working cooperatively with others in a crew.

## **MINIMUM QUALIFICATIONS**

### **Education:**

Possession of a high school diploma, GED, or recognized equivalent.

**Experience:**

One (1) year of (full-time equivalent) verifiable track maintenance experience which will have provided a familiarity with semi-skilled track maintenance procedures, equipment and supplies or one (1) year of (full-time equivalent) verifiable heavy construction or heavy labor experience. Track experience is preferred.

**Other Requirements:**

Must possess a valid California driver's license and have a satisfactory driving record. Must be physically able to perform strenuous physical labor both indoors/outdoors in all types of weather. Must be physically able to lift and carry various shaped material and equipment up to 50 lbs. within 100 yards or more. Must be physically able to walk, climb, stoop, bend, crawl, twist, work in confined spaces, work underground, and heights up to 60 ft. and walk on uneven surfaces. Must be physically able to climb and work from a ladder. Must be physically able to climb into vehicles with steps up to 25'' from the ground in close clearances. Must be able to wear respiratory and fall protective equipment during the performance of assigned\_duties in accordance with the District Respirator Program and applicable Cal-OSHA requirements and work in dusty work environment subject to various fumes and noise levels in the proximity of live voltage. Must be willing to work weekends and off-hours shifts. Must be able to understand, read, write, and communicate in English.

**WORKING CONDITIONS****Environmental Conditions:**

Field, shop, or construction site environment; exposure to dust, noises, fumes, heat, cold, confined spaces, heights, underground, moving vehicle, electrical energy and inclement weather conditions.

**Physical Conditions:**

Requires maintaining physical condition necessary for performing strenuous labor; lifting and carrying various material and equipment; walking, climbing, stooping, bending, crawling, twisting, working in confined spaces, underground, and heights, walking on uneven surfaces; climbing and working from a ladder; climbing in and out of vehicles; and wearing respiratory and fall protective equipment.

**EEOC: 08****Safety Sensitive Designation: Yes**

**TRANSIT VEHICLE ELECTRONIC TECHNICIAN**

FC: MA825

PC: 301

PG: MW-III

BU: 01(SEIU)

Created: January 1999

Revised: July 2009

**DEFINITION**

Under general supervision, performs skilled preventive maintenance, troubleshooting, primary and some secondary repair, and modification to a variety of electronic and electro-mechanical equipment and components found in revenue vehicles; performs related work as assigned.

**CLASS CHARACTERISTICS**

This is a journey level classification performing skilled preventive maintenance, repair and modification on all electronic and electro-mechanical systems and components found in transit revenue vehicles. Incumbents work independently according to accepted standards of the trade, supervisory direction and District procedures and practices, and established specifications. Incumbents may also provide on-site maintenance, trouble assessment, response and adjustment of revenue vehicles. This class is distinguished from other specialized technician classes in that the work relates specifically to the maintenance and repair of electro-mechanical and electronic systems and components found on transit revenue vehicles.

**EXAMPLES OF DUTIES**

1. Following a pre-established schedule, performs preventive maintenance, troubleshooting and primary maintenance, testing and adjustment of electronic and related electro-mechanical systems found on transit vehicles, including those associated with propulsion, train control, brake control, pneumatics, air conditioning, annunciation, communications, door control, including door check, cab check per established procedures, lighting, and auxiliary electrical supply.
2. Troubleshoots and performs primary maintenance on such systems, removing and replacing components as required to enable vehicles to be returned to revenue service.
3. Responds to and assesses transit vehicle operating problems in the field.

4. Makes field repairs to vehicles, provides technical information to central operations and maintenance control staff regarding equipment status and safety.
5. Performs major repair of vehicles involved in accidents.
6. Performs modifications to revenue vehicle electronic and electro-mechanical systems, as directed by engineering and supervisory staff.
7. Suggests improvements and works with engineering and other maintenance staff regarding modifications.
8. Uses diagnostic test equipment and precision measuring devices in the course of the work; may fabricate new testing equipment as required for use on new components and systems.
9. Performs secondary dismantling and repair of electronic and electro-mechanical systems.
10. Verifies performance of new or modified systems or equipment.
11. Works closely with transit vehicle mechanics in troubleshooting problems and performing primary repairs.
12. Reads and interprets diagrams, engineering drawings, manuals, schematics and work orders.
13. Measures, tests and inspects completed work to confirm adherence to specifications.
14. Documents work performed and parts and materials used; follows specified safety procedures.

## **QUALIFICATIONS**

### **Knowledge of:**

Basic operating principles of analog and digital electronics, electrical and electronic circuitry, and associated mechanical mechanisms, methods, equipment and materials used in the primary maintenance and repair of a variety of electronic and electro-mechanical systems, components and equipment. Use and care of testing and power and hand tools of the trade. Troubleshooting and diagnostic techniques. Shop arithmetic as required for the trade. Safety practices pertaining to the work.

**Skill in:**

Diagnosing and repairing operational problems in a variety of electronic and electro-mechanical systems, components and equipment. Performing preventive maintenance on and modifications to electronic systems and components. Reading and interpreting engineering drawings, diagrams, manuals and work orders. Using and maintaining hand and power tools and testing equipment of the trade. Understanding and following oral and written directions. Maintaining accurate records of work performed and materials used. Establishing and maintaining effective working relationships with those contacted in the course of the work.

**MINIMUM QUALIFICATIONS**

Associate in Science degree in electronics from an accredited community college or an Electronics Credential from an accredited electronics certificate program, or its equivalent (i.e., completion of a military electronics training program). Four (4) years of verifiable electronic maintenance (troubleshooting, repair, and maintenance of electronic and/or electro-mechanical equipment) can be substituted for the education.

**Other Requirements:**

Must possess adequate color vision and be physically capable of working in confining work spaces and lifting equipment weighing up to 70 pounds. Must be willing to work weekends, holidays, off hours shifts and occasional emergency overtime.

## TRANSIT VEHICLE MECHANIC

FC: MA830  
PG: MW-III

PC: 301  
BU: 01(SEIU)  
Created: October 1987  
Revised: July 2009

### DEFINITION

Under general supervision, performs skilled preventive maintenance, troubleshooting, primary and secondary repair, and modification to mechanical, electro-mechanical, pneumatic and hydraulic equipment and components found in revenue vehicles and supporting systems; performs related work as assigned.

### CLASS CHARACTERISTICS

This is a journey level classification performing skilled preventive maintenance, repair and modification on all mechanical, electro-mechanical, pneumatic and hydraulic systems and components for the District's revenue vehicles and related support systems. Incumbents work independently in accordance to specifications, accepted standards of the trade, supervisory direction and District procedures and practices. This class is distinguished from other specialized mechanical maintenance classes in that the work relates specifically to the maintenance and repair of systems and components found on transit revenue vehicles.

### EXAMPLES OF DUTIES

1. Performs preventive maintenance, testing and adjustment, troubleshooting and primary maintenance on mechanical, electro-mechanical, pneumatic and hydraulic systems and components of transit vehicles as required to enable the vehicles to be returned to revenue service. These duties include hook-up of a variety of electrical connections as part of routine maintenance, all aspects of spinning motors/axles, complete door check and cab check in accordance with established procedures, continuity checks and re-placement of shunts and other such items, adjustment/replacement of LSARS, basic door repair and adjustment, and replacement of contractor contacts on air compressors.
2. Troubleshoots and performs primary maintenance on a variety of mechanical components such as doors, brakes, traction motors,

and air condition so that they may be returned to use in revenue vehicles and related systems.

3. Performs major repair to vehicles involved in accidents; repairs interior components of vehicles such as seats, liners, doors and windows.
4. Performs modification to revenue vehicles as directed by engineering and supervisory staff; suggests improvements and works with engineering and other maintenance staff regarding modifications.
5. Uses diagnostic test equipment and precision measuring devices in the course of the work, including downloading and entering data as necessary.
6. Verifies performance of new or modified systems or equipment, including post-repair functional testing of propulsion systems (100/300 test or equivalent) and entering wheel data after performing wheel truing.
7. Works closely with Transit Vehicle Electronic Technicians in troubleshooting problems and performing primary repairs.
8. Reads and interprets diagrams, engineering drawings, manuals, schematics and work orders.
9. Measures, tests and inspects completed work to confirm adherence to specifications; uses shop equipment such as a wheel press and plating systems to recondition mechanical components; performs welding as required to complete assigned tasks.
10. Refuels hi railer to meet operational necessities.
11. Documents and records work performed and parts and materials used; follows specified safety procedures.

## **QUALIFICATIONS**

### **Knowledge of:**

Methods, equipment and materials used in the primary and secondary maintenance and repair of a variety of mechanical systems, components and equipment. Methods, equipment and materials used in the maintenance and repair of electro-mechanical, pneumatic and hydraulic systems, components and equipment. Use and care of testing and power and hand tools of the trade. Troubleshooting and diagnostic

techniques. Shop arithmetic as required for the trade. Safety practices and procedures pertaining to the work.

**Skill in:**

Diagnosing and repairing operational problems in a variety of mechanical, electro-mechanical, pneumatic and hydraulic systems, components and equipment. Performing preventive maintenance on and modifications to mechanical and related systems and components. Reading and interpreting engineering drawings, diagrams, manuals and work orders. Using and maintaining hand and power tools and testing equipment of the trade. Understanding and following oral and written directions. Maintaining accurate records of work performed and materials used. Establishing and maintaining effective working relationships with those contacted in the course of the work.

**MINIMUM QUALIFICATIONS**

A typical way of gaining the knowledge and skills outlined above is:

**Education:**

Equivalent to completion of an apprenticeship in a mechanical trade.

**Experience:**

One (1) year of journey level experience in the installation, maintenance or repair of mechanical systems and components similar to those found in the District's revenue vehicles; experience with electro-mechanical, hydraulic and pneumatic systems is desirable.

**Other Requirements:**

Must be physically capable of working in confining work spaces and lifting equipment weighing up to 70 pounds. Must be willing to work weekends, holidays, off hours shifts and occasional emergency overtime.

**UTILITY WORKER**

FC: MA835  
PG: UW

PC: 111  
BU: 06  
April 1998  
Revised: July 2009

**DEFINITION**

Under general supervision, performs a variety of janitorial duties in maintaining rolling stock shops, offices, and revenue vehicles in a clean and orderly condition; performs related work as assigned.

**CLASS CHARACTERISTICS**

This class is distinguished from the System Service Worker classification in that the janitorial duties relate to rolling stock shops, offices, and revenue vehicles.

**EXAMPLES OF DUTIES**

1. Receives daily work assignments from appropriate supervisor.
2. Assembles necessary cleaning equipment, materials, supplies, cleaning solutions, and required protective gear.
3. Cleans office areas by vacuuming floors, carpets and upholstery, shampooing carpets and upholstery, emptying ashtrays and trash cans, dusting and washing chairs, desks, files and other surfaces and washing walls and doors.
4. Cleans and disinfects restroom surfaces and fixtures using detergents and chemicals; restocks restrooms with service supplies such as soap and paper goods.
5. Performs heavy cleaning in shop areas, including service pits, truck bays and docks and floor areas, ensuring that debris and grease are removed.
6. In employee lunchroom areas, cleans sink, stove, refrigerator, and tables in addition to floor and wall areas.
7. Following specified procedures steam cleans tools or parts; cleans revenue vehicles by removing trash, vacuums carpets and seats, scrubs walls, doors and windows and spots and shampoos carpeted and upholstered areas.

8. Replaces worn seat covers and seat backs as required.
9. Documents work performed; performs cleaning tasks known as common labor.

### **QUALIFICATIONS**

#### **Knowledge of:**

Cleaning procedures, methods, supplies, tools, and equipment. Safe working practices and techniques.

#### **Skill in:**

Using Hand tools and power equipment to vacuum, scrub, strip, wax, buff, shampoo, and otherwise clean varied surfaces and fixtures. Using detergents and cleaning solutions correctly and safely. Following oral and written directions. Working independently without immediate supervision. Working cooperatively with others. Maintaining accurate basic logs and records of work performed.

### **MINIMUM QUALIFICATIONS**

#### **Education:**

Equivalent to completion of the twelfth grade.

#### **Experience:**

One year of experience which will have provided a familiarity with janitorial procedures, equipment, and supplies.

#### **Other Requirements:**

Must have physical capability to perform strenuous physical labor, including sufficient strength to lift trash containers and equipment weighing up to 50 pounds. Must be willing to work weekends and off-hours shifts. Must possess a valid California driver's license and have a satisfactory driving record.

**VEHICLE INSPECTOR**

FC: TA130  
PG: INSPECTOR

PC: 311  
BU: 01 (SEIU)  
Created: October 1997  
Revised: July 2009

**DEFINITION**

Under general supervision, performs electrical and electro/mechanical inspection of revenue vehicles in accordance with established procedures. Performs vendor source inspections, receiving inspections of equipment or fabrication materials purchased to assure quality and safety; prepares reports and maintains records of vehicle inspections performed; performs related work as assigned.

**CLASS CHARACTERISTICS**

This classification performs a variety of revenue vehicle inspections to ensure a high level of quality and safety in District and vendor installation, scheduled maintenance, repair, modification, and manufacturing processes as defined by District Policy and Procedures. Incumbents may receive day-to-day scheduling and administrative work assignments from supervisory personnel within the maintenance function, but receive ongoing technical supervision from the Quality Assurance Division. This class is distinguished from Wayside Inspector in that the former performs duties related specifically to the inspection of transit vehicle components and systems.

**EXAMPLES OF DUTIES**

1. Per established procedures performs inspections of transit vehicle systems and components including friction brake systems, mechanical coupler and draft gear, propulsion and auxiliary electric systems, traction motors, wheels and axles, doors and operator panels, interior and exterior integrity, damaged equipment, and worn or malfunctioning parts and equipment.
2. Monitors District maintenance staff performance of various testing to confirm validity of procedures, limits established, and documentation of parts and equipment tested.
3. Tests and inspects transit vehicle and other parts and equipment received for adherence to specifications including mechanical tolerances, electrical and electronic current stability and values and related operational characteristics.

4. Evaluates drawings and specifications to verify proper documentation and appropriate parts and materials; evaluates equipment used in prototype operations at the test track for performance to specifications.
5. Prepares a variety of documentation, including reports and checklists of inspections performed, results and follow-up required.
6. Discusses inspection results and follow-up required with shop supervisors; operates a variety of inspection and measuring equipment including micrometers, calipers and protractors, surface testers, hardness testers and various specialized testing tools; check calibration and performs routine maintenance of inspection and measuring equipment.
7. The Vehicle Inspector certifies a revenue vehicle for release, acts as liaison with engineering functions, participates in problem-solving, audits, tool control, and assures completion of the preventive maintenance package.

## **QUALIFICATIONS**

### **Knowledge of:**

Methods and techniques of transit vehicle inspection, testing and measurement. Basic electrical, electronic and electro-mechanical principles and practices. Use, calibration and routine maintenance of a wide variety of testing and measurement tools and equipment. Standards, codes and specifications used in vehicle inspections. Basic operating characteristics of transit vehicle equipment. Safe working practices as applied to transit vehicle inspection. Inspection documentation, forms, procedures, and standards.

### **Skill in:**

Inspecting, testing and measuring transit vehicle parts, equipment, components and systems for adherence to specifications, procedures, or standards. Using, checking calibration and performing routine maintenance of a wide variety of testing and measurement tools and equipment. Preparing technical reports and records of inspection performed, results and follow-up required. Establishing and maintaining effective working relationships with those contacted in the course of the work. Reading and interpreting drawings, specifications and documentation to assess and document completeness and adherence to

requirements. Using sound independent judgment within established guidelines.

### **MINIMUM QUALIFICATIONS**

A typical way of gaining the knowledge and skills outlined above is:

#### **Education:**

Equivalent to completion of high school and two years of journey level experience in the maintenance and repair of transit vehicles, such as found in the BART system.

#### **Experience:**

One year of quality assurance inspection experience of a similar type and nature.

#### **Other Requirements:**

Must possess a valid California driver's license and have a satisfactory driving record. Must be physically able to walk, climb, stoop and crawl to inspect equipment. Must be willing to work off-hours shifts. Must be willing to travel within the District system and to vendor sites.

To use this index, find the page number for the MAJOR HEADINGS at the beginning of this index (subject headings are in alphabetical order). Then locate the subheading in the INDEX below. The item you may be looking for may have cross references, and there may be multiple sections of the contract that refer to the same topic. In order to be sure you have all the information about the particular subject you are referring to, it is important to read all related sections and cross references of the contract.

### MAJOR HEADINGS OF THE INDEX

<u>SUBJECT HEADING</u>	<u>PAGE(S)</u>
AFFIRMATIVE ACTION	275
ALLOCATION AND ORGANIZATION OF WORK	275-276
AMENITIES AND INCIDENTAL SERVICES	276
BENEFICIAL PRACTICES	276
COMPENSATION (SEE ALSO LEAVE BENEFITS-PAID)	276-278
CONTRACT INTERPRETATION	298
DEFINITIONS	278-279
DISABILITY (SEE ALSO HEADINGS FOR TEMPORARY MODIFIED ASSIGNMENTS AND LEAVE BENEFITS PAID SICK-LEAVE)	279-280
DISCIPLINE, PROBATION AND TERMINATION	280
DISCRIMINATION PROHIBITED	280
EQUAL EMPLOYMENT OPPORTUNITY/ AFFIRMATIVE ACTION (SEE HEADING DISCRIMINATION PROHIBITED)	280
EQUIPMENT (SEE HEADING UNIFORM AND EQUIPMENT)	280
EMPLOYEE ASSISTANCE PROGRAM	280
FOREWORKERS	280-281

<b>SUBJECT HEADING</b>	<b>PAGE(S)</b>
GRIEVANCES	281
HOLIDAYS	281-282
INSURANCE BENEFITS	282-283
INVESTIGATIONS (SEE HEADING DISCIPLINE, PROBATION & TERMINATION)	283
LAYOFF AND RECALL	283-284
LEAVE BENEFITS (PAID)	284-285
LEAVE BENEFITS (UNPAID)	285-286
MEDICAL EXAMINATIONS	286-287
OVERTIME (SEE COMPENSATION HEADING)	287
PAY PERIODS AND PROCEDURES	287
PERSONNEL RECORDS	287
PROBATION (SEE HEADING DISCIPLINE, TERMINATION & PROBATION)	287
RETIREMENT	287-288
RULES OF CONDUCT	288-289
SAFETY	289
SCHEDULES (SEE WORK SCHEDULES, HOLIDAYS, VACATION HEADINGS)	289
SELECTION PROCESSES	289-290
SENIORITY	290

<b>SUBJECT HEADING</b>	<b>PAGE(S)</b>
STAFFING	290
STRIKES/LOCKOUTS PROHIBITED	290
TEMPORARY MODIFIED WORK (TMA)	291
TRAINING AND DEVELOPMENT	291-292
TRAVEL	292
UNIFORM AND EQUIPMENT	293
UNION RIGHTS, DUTIES AND OPERATIONS	293
VACATION	294
WAGES (SEE COMPENSATION HEADING)	294
WORK SCHEDULES	294-296

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
<b>AFFIRMATIVE ACTION</b>		
Affirmative action committee	18.2	87
Non-discrimination	18.1	86
<b>ALLOCATION AND ORGANIZATION OF WORK</b>		
BAP and reorganization	28.5	145
Beneficial practices	1.5	2
Buildings Foreworker classification	MOU 034-7	193
Choice of work schedules by staff assistants, clerical and engineering aides	19.2	87
Classification changes	28.2	117
Classification plan	28.3	126-127
Contracting-out work	1.8	4
Foreworkers	19.2	88-89
Filling Temporary Foreworker Vacancies	19.2	88-89
Pay Differential	19.2	88-89
Supervisory Responsibilities	19.2	88-89
Interpretation in case of conflict between General and Supplemental Provisions	10.0	56
Mainline technician staffing	MOU 047-8	206
New or revised classifications/ grievances	28.1	117
Senior storekeepers – minimum number	14.9	72
Staffing assistants, Clerical and Engineering Aides	19.1	87
System Foreworkers	SL 1-3	153
duties	SL 1-3	153
minimum qualifications	SL 1-3	153
System service workers	MOU 033-7	190
upgrade to Foreworker II status	MOU 044-8	200
Temporary Agency Employment	27.3	115
Temporary and part-time employment	27.3	115
Temporary Agency Employment – Clerical Subunit	27.3	115
Part-Time Employment – Maintenance Subunit	27.3	115
Conditions of hiring	27.3	115

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Types of vacancies	27.3	115
Temporary instructor status	14.7	71
Temporary modified assignments	9.5	51
Temporary upgrade	27.2	114
Temporary vacancies	27.1	111
Clerical Subunit	27.1	111
Extending temporary vacancy period	27.1	111
Procedure to fill temporary vacancy	27.1	111
Maintenance Subunit	27.1	111
Extending temporary vacancy period	27.1	111
Procedure to fill temporary vacancy	27.1	111
Return to work	27.1	111
Filling temporary vacancy permanently	27.1	111
Returning employee's rights	27.1	111
Specific Project Assignments	27.1	111
Applicable units	27.1	111
Reporting to non-bid locations	27.1	111
Track and structure employees		
Class A driver's license requirement	MOU 040-8	196
Transportation and system service department organizational structure	SL 8-9	166
<b>AMENITIES AND INCIDENTAL SERVICES</b>		
Break and Rest Facilities	11.4	58
Bulletin boards	2.5	7
Employee's copy of labor agreement	1.3	1
First aid facilities	11.3	58
Labor agreement (employee copy)	1.3	1
Meal allowance	14.1	67
Transportation passes	7.1	36
Vending Machines	2.6	7
<b>BENEFICIAL PRACTICES</b>	<b>1.5</b>	<b>2</b>
<b>COMPENSATION (SEE ALSO LEAVE BENEFITS-PAID)</b>		
Base Wage Schedule Administration	28.4	128
CAD Drafters	SL 1-9	171

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Call-back pay	14.4	70
Compensatory time-off in lieu of overtime	14.8	72
Cost of living adjustment	8.2	40
Donations of vacation and floating holidays	SL 4-5	169
Employee Development Specialist	17.4	79
Flexible Spending Accounts	SL 6-7, MOU 8-1	172 206
Foreworker premium	19.2	88
Jury Duty	4.6	16
Holiday pay	16.3	75
Leadworker and lead assembler premiums	14.5	70
Meal Allowance	14.1	67
Overtime	14.1	67
Accruing overtime and rate of pay	14.1	67
Emergency overtime	14.1	67
Holiday work	16.4	75
Maximum continuous hours per shift	14.1	67
Overtime, bidding and inverse assignment of shift	14.1	67
Overtime exception list	14.1	67
Exemption of budget analysts	SL 6-2	163
Overtime not compounded	14.1	67
Overtime rate of pay (daily)	14.1	67
Overtime rate of pay (RDOs)	14.1	67
Pay plan for professional employees	SL 6-3	164
Movement between steps	SL 6-3	164
Step and grade pay intervals	SL 6-3	164
Shift Differential	14.2	69
Training Travel	17.6	79
Graveyard shift premium	14.2	69
Overlapping shifts	14.2	69
Relief shift Premium	24.7	105
Shifts defined	14.2	69
Swing shift premium	14.2	69
Special work premium	14.6	71
Stand-by pay	14.3	70

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Temporary instructor pay	14.7	71
Temporary modified assignment	9.5	51
Temporary upgrade pay	27.2	114
Transfers within the umbrella bargaining unit	8.3	41
Travel time to/ from report location	7.2	38
Uniform allowance	12.2	60
Union business	20.1	89
Unscheduled call-backs	14.4	70
Wage guidelines of superior government authorities	1.7	4
Witness or deposition pay	4.7	17
<b>CONTRACT INTERPRETATION</b>		
Interpretation in case of conflict between General and Supplemental Provisions	10.0	56
<b>DEFINITIONS</b>		
Classification seniority date	23.2	98
Department (for TMA purposes)	9.5	51
Dependent (for medical benefit purposes)	5.1	17
Dependent children (for transportation pass)	7.1	36
Derogatory material	22.3	96
District date of hire	23.1	98
District required reduce in force	3.5 E 2	10
District required shift change	3.5 E 1	10
Emergency (overtime)	14.1	67
Good standing (for return to job bargaining unit)	26.3 D	111
Grievance	21.1	92
Immediate family member	4.2	13
Incident (Sick leave & Disability)	9.4	51
Lead Assembler	14.5	70
Leave(s) of absence	4.5	15
Memorandum of Understanding	29.1	148
Primary Labor Dispute	1.6 A 3	2
Service Retirement	9.4	51
Shift definitions	14.2	69
Sick leave with pay	9.1D	41

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Side Letter	29.1	148
Special work	14.6	71
Temporary vacancy	27.1	111
Unpaid status (for holiday pay purposes)	16.3	75
Voluntary shift change	3.6 E 3	12
<b>DISABILITY (SEE ALSO HEADINGS FOR TEMPORARY MODIFIED ASSIGNMENTS AND LEAVE BENEFITS PAID SICK LEAVE)</b>		
Coverage rates for short and long-term disability	5.9	32
Donation of vacation and holidays	SL 4-5	169
Pregnancy related disability	4.4	14
Purchasing additional coverage	5.9	33
Temporary Modified Work (TMA)	9.5	51
Accommodation Review by benefits analyst	9.5	51
Administrative committee	9.5	51
Applying for TMA	9.5	51
Assignments not considered change in location	9.5	51
Assignment options	9.5	51
Availability to employees	9.5	51
Changing work hours/days off while on TMA	9.5	51
Declining TMA and selecting alternate assignment	9.5	51
Determining eligibility and coordination of assignments	9.5	51
Independent medical exam by District while on TMA	9.5	51
Inter-bargaining unit TMA's	9.5	51
Medical examination to determine work accommodation	9.5	51
Pay rate while on TMA	9.5	51
Scheduling medical exams while on TMA	9.5	51
Sixty-day review	9.5	51
Termination of particular TMA	9.5	51
Transfer between TMA	9.5	51

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Vacancies filled by other methods before TMA allowed	9.5	51
<b>DISCIPLINE, PROBATION AND TERMINATION</b>		
Admissibility of derogatory material	22.3	96
Disciplinary Hearing Required	22.1	96
Duty to cooperate with investigation	3.1	8
Employees in positions outside the bargaining unit/ reversion	26.3	111
Investigations	3.1	8
Of criminal/ civil violations	3.1	8
Of employees	3.1	8
Job abandonment hearings	22.4	97
Locker inspections	3.1	8
Probation/new hires	26.1	109
Probation on promotion	26.2	110
<b>DISCRIMINATION PROHIBITED</b>	<b>18.0</b>	<b>86</b>
<b>EQUAL EMPLOYMENT OPPORTUNITY/AFFIRMATIVE ACTION (SEE HEADING DISCRIMINATION PROHIBITED)</b>		
<b>EQUIPMENT (SEE HEADING UNIFORM AND EQUIPMENT)</b>		
<b>EMPLOYEE ASSISTANCE PROGRAM</b>	<b>5.10</b>	<b>33</b>
Confidential referral service	5.10	33
District's monetary contribution for consultant's fee	5.10	33
Employee's monetary contribution	5.10	33
<b>FOREWORKERS</b>	<b>19.2</b>	<b>88</b>
Allocation and organization of work		
Filling temporary Foreworker vacancies	19.2	88
Pay differential	19.2	88
Supervisory responsibilities	19.2	88
System Foreworkers	SL 1-3	153
Duties	SL 1-3	153
Minimum qualifications	SL 1-3	153
System Service Workers	MOU 033-7	190
Upgrade for Foreworker II status	MOU 044-8	200
Compensation	19.2	88
Foreworker Selection Committee	24.6	104
Candidate evaluation procedure	MOU 049-8	202

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Seniority	19.2	88
Work schedule		
Rolling Stocks and Shops – Trouble Desk		
Foreworker meal periods	MOU 014-4	186
<b>GRIEVANCES</b>		
Extension or waiver of time limits	21.4	95
Forfeiture on failure to timely respond	21.4	95
Formal arbitration	21.2	92
Grievance defined	21.4	95
Grievance procedures	21.2	92
Immediate arbitration	21.2	92
Informal arbitration	21.2	92
Policy favoring lowest level solution	21.2	92
Powers of the arbitrator	21.2	92
Step 1 filing and response time limits	21.2	92
Step 2 filing and response time limits	21.2	92
Step 3 filing and meeting	21.2	92
Step 4 arbitration striking time limit	21.2	92
Time limit for processing settlements and arbitration award remedies	21.4	95
Witnesses entitled to pay	21.3	95
<b>HOLIDAYS</b>		
Designated and floating holidays	16.1	74
Donation of vacation and holidays	SL 4-5	169
Employee birthday	16.2	74
Holiday work/pay	16.4	75
Employee normally working on holiday	16.4	75
Option to float holiday	16.4	75
Premium over regular pay rate and maximum hours	16.4	75
Rotation of holiday overtime among employees	16.4	75
Volunteering to work holiday	16.4	75
Pay	16.3	75
Carrying over prohibited	16.3	75
Eligibility for holiday pay	16.3	75
Unpaid status definition	16.3	75

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Scheduling	16.5	75
Assigning work by seniority when insufficient workforce	16.5	75
Clerical employees' weekend scheduling	16.5	75
Floating holidays notice requirement	16.5	75
Requesting vacation after annual vacation bid	16.5	75
<b>INSURANCE BENEFITS</b>		
Assault insurance	5.7	28
Benefits review	5.11	33
Employee Assistance Program	5.10	33
Confidential referral service	5.10	33
District's monetary contribution for consultant's fee	5.10	33
Employee's monetary contribution	5.10	33
Dental	5.3	26
annual maximum for preventive, restorative and prosthodontic care combined	5.3	26
coverage rates for preventive, restorative, prosthodontic and orthodontic care	5.3	26
deductible for orthodontic care	5.3	26
Enhanced dental plan option	5.3	26
Maximum lifetime benefit for orthodontic care	5.3	26
Domestic Partners	1.9	5
Group insurance & District self-funded Plans/General Provisions	5.1	17
Accelerated Benefits plan for terminally ill employees on disability agreement no to change benefits and notification if change required by law	5.1	17
coverage for married employees/ domestic partners	5.1	17
dependant defined	5.1	17

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
ineligibility for medical benefit for non-job-related disability over two years	5.1	17
Life insurance	5.5-5.6	27
Long-term disability insurance	5.9	32
Medical insurance and prescription drug benefits	5.2	19
governing plan rules	5.2	19
premium co-payment	5.2	19
tax exemption for certain medical expenses	SL 6-7	172
arbitration of employee contribution	SL 6-7	172
changing the agreement	SL 6-7	172
duration of agreement	SL 6-7	172
employee contribution and revisions	SL 6-7	172
enrollment period	SL 6-7	172
termination from program	SL 6-7	172
Retiree Life insurance	6.3	35
Retiree medical insurance	5.2	19
employer contributions	5.2	19
employee contributions	5.2	19
funding of retiree insurance	5.2	19
retiree health benefits trust	5.2	19
trust review committee	5.2	19
Sick leave	9.1	41
deposit of bankable leave into MPPP	9.1	41
Survivor benefits	5.8	28
cost of program	5.8	28
eligibility criteria for survivors	5.8	28
part time and temporary employees	5.8	28
Vision	5.4	27

**INVESTIGATIONS (SEE HEADING DISCIPLINE, PROBATION &  
TERMINATION)**

**LAYOFF AND RECALL**

Arbitration for reorganization, BAP	28.5	145
BAP and reorganization	28.5	145
Clerical sub-unit	25.1	107
Maintenance sub-unit	25.2	107

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Recall	25.3	108
Duration of recall rights	25.3	108
Information about openings for laid-off employees	25.3	108
Notices of recall	25.3	108
Order of recall	25.3	108
Reduction in force	25.0-25.3	107-108
Resources for training of laid off workers	MOU 062-2	219
<b>LEAVE BENEFITS (PAID)</b>		
Bereavement	4.2	13
Donations of vacation and holidays	SL 4-5	169
Employee Birthday as holiday	16.2	74
Grievances (see separate heading)	21.3	95
Holidays (see separate heading)	16.1-16.5	74-76
Industrial Injury/ Illness	9.2	47
Annual industrial accident leave maximum	9.2	47
Commencement of leave	9.2	47
Coordinating industrial accident/ sick leave with Workers' Compensation and other benefits	9.2	47
Eligibility requirements for industrial leave	9.2	47
Improper or invalid leave	9.2	47
Maximum compensation per industrial accident	9.2	47
Jury duty	4.6	16
Calculating compensation	4.6	16
Requirements for receiving excused absence and pay	4.6	16
Rescheduling Regular Days Off (RDOs) under 5-8 and 4-10 work-week plans	4.6	16
Military leave	4.3	14
Adjusting schedule for military training	4.3	14
Eligibility for receiving pay for first 30 days of leave	4.3	14

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Sick leave	9.1	41
Accrual rate and accumulation maximum	9.1	41
Sick Leave incentives	9.1	41
PERS Retirement Service Credit	9.1	41
Annual buy-back option or MPPP Incentive	9.1	41
One time election to convert sick leave accrual prior to October 19, 2009 to PERS creditable sick leave	9.1	41
Sick leave accrued prior to October 19, 2009	9.1	41
Order or use of sick leave from separate accounts	9.1	41
Reporting sick leave (employee duty)	9.1	41
Sick leave payment	9.1	41
Charges for absence when sick leave exhausted	9.1	
Charging holidays for sick leave/ limitation	9.1	41
Eligibility criteria	9.1	41
Paid sick leave defined	9.1	41
Sick leave during probation	9.1	41
Substitution of other leaves to preserve sick leave buy-back option	9.1	41
Sick leave verification	9.1	41
Abuse of sick leave	9.1	41
Doctor's statement	9.1	41
Failure to provide timely doctor statement	9.1	41
Medical examination	9.1	41
Vacation	4.1	12
Deposit of banked vacation into MPPP	4.1	12
Witness duty (see also compensation heading)	4.7	17
<b>LEAVE BENEFITS (UNPAID)</b>		
Leave of absence	4.5	15
Accumulating service during leave	4.5	15

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Benefits while on leave	4.5	15
Determining leave duration	4.5	15
Emergency leave	4.5	15
Failure to return after leave	4.5	15
Leave for personal matters	4.5	15
Requesting leaves of less than two days	4.5	15
Vocational/ Educational leave	4.5	15
Voluntary service leave	4.5	15
Maternity leave	4.4	14
Commencement of leave and return to work	4.4	14
Pregnancy-related disability	4.4	14
<b>MEDICAL EXAMINATIONS</b>		
General Requirements	9.3	48
Choice of doctor for job-related illness or injury	9.3	48
Payment for District required examinations	9.3	48
Payment for cancellations/ missed appointments	9.3	48
Scheduling of medical examinations	9.3	48
Job-related illness or injury procedure	9.3	48
Income/benefits after second opinion	9.3	48
Income/benefits for District required doctor appointments	9.3	48
Reimbursement of District after third opinion	9.3	48
Second medical opinions	9.3	48
Third medical opinions	9.3	48
Non-job-related illness or injury	9.3	48
Employee's right to choose a doctor	9.3	48
Income/ benefits for District-required doctor	9.3	48
Income/benefits after second opinion	9.3	48
Reimbursement of District after third opinion	9.3	48
Second medical opinions	9.3	48

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Selection of doctor for a medical examination	9.3	48
Third medical opinions	9.3	48
Stress Management	9.6	56
While on Temporary Modified Assignments	9.5	51
<b>OVERTIME (SEE COMPENSATION HEADING)</b>		
<b>PAY PERIODS AND PROCEDURES</b>	<b>8.0</b>	<b>39</b>
Adjustments, deductions and corrections	8.1	39
Advance paycheck for paydays scheduled vacation	8.1	39
COPE deductions	12.5	62
Deductions for work equipment	12.5	62
Electronic direct deposit	8.1	39
Final termination paychecks and PERS refund forms	8.1	39
Holdback pay maximum	8.1	39
Hourly v. salaried status	8.1	39
Paychecks on RDO or absence	8.1	39
Recovery of overpayment	8.1	39
<b>PERSONNEL RECORDS</b>		
Access to Personnel Files	3.2	9
Confidentiality	3.2	9
Derogatory material	22.3	96
Documents placed in file	3.2	9
Inspection of personnel file	3.2	9
Matters in personnel file not accessible by employees	3.2	9
Matters in personnel file not accessible by supervisory personnel	3.2	9
Receiving a copy of official personnel file	3.2	9
Removal of certain matters from file	3.2	9
Terminated employees	3.2	9
<b>PROBATION (SEE HEADING DISCIPLINE, TERMINATION &amp; PROBATION)</b>		
<b>RETIREMENT</b>		
CalPERS Pension	6.1	33
District pick-up of employee contribution	6.2	34
District reimbursement to PERS for back contributions	6.2	34

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Employee contribution to offset 2% at 55 retirement option	6.2	34
Increase in employee contribution to PERS	6.2	34
Legal status of PERS pick-up	6.2	34
PERS savings accruing to District on or after July 1, 1989	6.5	36
Service credit option for continuous active military service prior to employment with BART	6.6	36
Tax liability arising out of pick-up	6.2	34
Two percent at 55 retirement plan	6.1	33
Investments Committee (role)		157-160
Money Purchase Pension Plan	6.4	35
District's contribution to Plan and annual maximum	6.4	35
Additional contributions to Plan during PERS Superfunding	6.4	35
Amount of additional contribution by District	6.4	35
Contributions to Retiree Health Trust	6.4	35
Termination of additional contribution	6.4	35
Retiree Life Insurance	6.3	35
Retiree medical and Prescription Drug Benefits	5.2	19
Co-payment for PERS plan member employees	5.2	19
Co-payment deduction for retirees and nonpayment	5.2	19
District's right to terminate or change health benefits	5.2	19
Funding, Annual Required Contribution (ARC)	5.2	19
Retiree Health Benefits Trust (RHBT)	5.2	19
Trust Review Committee	5.2	19
Survivor benefits	5.8	28
<b>RULES OF CONDUCT</b>		
Adherence to safety standards	11.1	56

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Appearance	3.3	10
Clean uniforms	12.2	60
Duty to use reasonable care in use of tools	12.1	59
Maintaining proper tools	12.1	59
Misuse of passes	7.1	36
Misuse of union business leave	20.1	89
No strike or related activity	1.6	2
Removal of District equipment	12.1	59
Reporting sick leave absences	9.1	41
Tools, equipment and work area	11.1	56
Union compliance with rules	2.3	6
<b>SAFETY</b>		
District's health and safety obligations	11.0	56
Adhering to safety standards	11.1	56
Employee responsibility for tools, equipment and work area	11.1	56
Informing District of noncompliance	11.1	56
Notice of health/ safety hazards	11.1	56
Physical exams	11.1	56
Safety equipment	11.1	56
Joint Union/Management Safety and Health Committee	11.2	57
Physical and weight lifting requirements	11.5	58
Safety conditions	11.1	56
Safety equipment	12.3-4	61
Safety glasses	12.4	61
Safety shoes	12.3	61
Safety test for hazardous conditions	11.1	56
<b>SCHEDULES (SEE WORK SCHEDULES, HOLIDAY SCHEDULES, VACATION SCHEDULE HEADINGS)</b>		
<b>SELECTION PROCESSES</b>		
Advance Bid Form (ABF Process)	24.5	103
Changes in bid specifications	24.5	103
Current form requirement	24.5	103
Implementation procedures	24.5	103
Position awards	24.5	103
Bidding in the Clerical subunit	24.1	99
Bidding while away from District	24.1	99
Order of bid consideration	24.1	99

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Vacated or newly created positions	24.1	99
Bidding in the Maintenance sub-unit	24.2	100
"continuously open" vacancies	24.2	100
Return from absence during bidding	24.2	100
Eligibility bidding pools	24.8	105
Admittance procedures	24.8	105
Declining a position	24.8	105
Filling job positions	24.8	105
Listing of Internal Eligibility Pools	24.8	105
Foreworker Selection Committee	24.6	104
Candidate evaluation procedure	24.6, MOU 049-8	104 202
Pick units	28.2	117
Relief shift	24.7	105
System-wide bidding	24.3	101
Bidding procedure	24.3	101
Eligibility to bid	24.3	101
System-wide Position Award	24.4	102
Accepted bid	24.4	102
Return of employee bid sheet	24.4	102
Posting, award and commencement of work	24.4	102
Temporary instructors	14.7	71
<b>SENIORITY</b>		
Classification seniority date	23.2	98
Common seniority date procedure	23.3	98
District date of hire	23.1	98
Foreworkers	19.2	88
Recall priority	25.3	108
Selection of vacation times	15.1	72
Super-seniority	20.2	92
System-Bidding Seniority	23.4	98
Termination of employment	23.5	98
Transfers within the umbrella bargaining unit	8.3	41
<b>STAFFING</b>		
Special position assignments	14.9	72
<b>STRIKE/ LOCKOUTS PROHIBITED</b>	<b>1.6</b>	<b>2</b>

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
<b>TEMPORARY MODIFIED WORK (TMA)</b>	<b>9.5</b>	<b>51</b>
Accommodation Review by benefits analyst	9.5	51
Administrative committee	9.5	51
Applying for TMA	9.5	51
Assignments not considered change in location	9.5	51
Assignment options	9.5	51
Availability to employees	9.5	51
Changing work hours/ days off while on TMA	9.5	51
Declining TMA and selecting alternate assignment	9.5	51
Determining eligibility and coordination of assignments	9.5	51
Independent medical exam by District while on TMA	9.5	51
Inter-bargaining unit TMA's	9.5	51
Medical examination to determine work accommodation	9.5	51
Pay rate while on TMA	9.5	51
Scheduling medical exams while on TMA	9.5	51
Sixty-day review	9.5	51
Termination of particular TMA	9.5	51
Transfer between TMA's	9.5	51
Vacancies filled by other methods before TMA allowed	9.5	51
<b>TRAINING AND DEVELOPMENT</b>		
Change Development and Training Oversight Committee	17.7	79
Educational Assistance Program	3.5	10
Advance on tuition by payroll deduction	3.5	10
Annual maximum for all employees	3.5	10
Annual maximum depending on degree level	3.5	10
Approved types of courses	3.5	10
Compensation for text books and course materials	3.5	10

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Employee retention of textbooks and course materials	3.5	10
Non-completion of course because of shift change or reduction in force	3.5	10
Requirements for seeking prior approval and reimbursement	3.5	10
Employee Development Specialists	17.4	79
Intermediate and senior clerks in training	17.3	78
Joint training committee	17.2	77
Training equipment and material	17.8	81
Training travel and shift differential	17.6	79
Training programs	17.1	76
Rolling Stock and Shops clerical staff training program	MOU 027-6	194
Transit information center clerical staff training program	MOU 028-6	187
Training scheduling	17.5	79
Training Programs	17.9	81
<b>TRAVEL</b>		
Pass privileges	7.1	36
Dependent children defined	7.1	36
Displaying identification card requirement	7.1	36
Eligible domestic partner and their eligible children's pass privileges	7.1	36
Failure to display ID or misuse	7.1	36
Fee to replace ID card for employee and dependents	7.1	36
Free travel for full-time employees, pensioners, spouse and dependents on BART	7.1	36
Number of ID cards provided to Union representatives	7.1	36
Revocation of pass on termination	7.1	36
Spouse and dependent pass privileges	7.1	36
Travel allowance	7.3	38
Local travel expense	7.3	38
Outside District travel expense	7.3	38
Reimbursement option	7.3	38

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Travel allowance in lieu of reimbursement	7.3	38
Travel time between District locations	7.2	38
Work-related travel between District	7.2	38
<b>UNIFORM AND EQUIPMENT</b>		
Tool issuance, maintenance and replacement	12.1	59
Employee negligence in causing damage/ loss	12.1	59
Purchase of uniforms and equipment through payroll deductions	12.5	62
Maintenance of required amount, type and quality of tools	12.1	59
Removing tools from District property	12.1	59
Replacement of tools	12.1	59
Semi-annual tool inspection and inventory	12.1	59
Sharing issued tools	12.1	59
Special tools and equipment not on tool list	12.1	59
Terminating and/or transferring employees	12.1	59
Tool ownership ID mark	12.1	59
Tools and tool boxes provided	12.1	59
Uniforms/Allowance	12.2	60
<b>UNION RIGHTS, DUTIES AND OPERATIONS</b>		
Access to work locations	2.3	6
Agreements furnished by District	1.3	1
Beneficial practices	1.5	2
Bulletin boards	2.5	7
Collection of fines and penalties	2.4	7
Conducting union business	20.1	89
Compensated union business	20.1	89
Investment Plan Committee meetings	SL/Gen-4-4	155
Intent to engage in union business	20.1	89
Misuse of union stewards	20.1	89
Number of union stewards	20.1	89

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Recall rights, seniority, and benefits for employee union officials	20.1	89
Union representative's responsibility	20.1	89
Use of District communications	20.1	89
Deduction of union dues and other assessments for paychecks	2.4	7
Duty to ensure rapid efficient transit system	1.1	1
Leaves of absence over six months	4.5	15
Leaves of absence over thirty days	4.5	15
Lost property	3.6	12
Misuse of union business	20.1	89
Payment of dues as condition of continued employment	2.2	6
Presence during locker inspections	3.1	8
Random substance abuse testing representation	MOU 095-01	198
Safety conditions	11.1	57
Super seniority	20.2	92
Union membership	2.2	6
Union recognition	2.1	5
Vending machines proceeds	2.6	7
<b>VACATION</b>	<b>4.1</b>	<b>12</b>
Accrual rate and service breaks	4.1	12
Accumulation ceiling	4.1	12
Cancellation due to illness	15.2	73
Deposit of banked vacation into MPPP	4.1	12
Donations of vacation and holidays	SL 4-5	169
Scheduling	4.1	12
Seniority and selection of vacation times	15.1	72
<b>WAGES (SEE COMPENSATION HEADING)</b>		
<b>WORK SCHEDULES</b>		
Choice of work schedule for employees in Cash Handling Building	MOU 022-6	183
Choice of work schedule for staffing assistants, clerical and engineering aides	19.1	87
4-10 workweek	19.1	87
9/80 work schedule	19.1	87
Flextime	19.1	87
Standard work week	19.1	87

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Employee Development Specialists	17.4	79
Shop trainer positions	MOU 031-7	189
Holiday scheduling	16.5	76
Medical exams	9.3	48
Military leave	4.3	14
Rolling Stock and Shops – Trouble Desk		
Clerical staff overtime procedure	MOU 027-6	194
Training program	MOU 027-6	194
Foreworker meal periods	MOU 014-4	184
Relief shifts	MOU 011-4	184
Shift changeover	14.1	67
Shift exchanges	13.6	67
Training scheduling	17.5	79
Transit information center clerical staff overtime	MOU 028-6	187
Vacation times	15.1	73
5-8 Work Schedule	13.1	63
Break periods	13.6	67
Days of work and rest in 7 days	13.1	63
Day, swing, and night work shift designations	13.1	63
Eight hours in work day	13.1	63
Exception to minimum time between shifts	13.1	63
Maintenance employees	13.3	66
Paid meal period requirement	13.3	66
Meal periods	13.4-5	66
Clerical employees	13.4	66
Option of paid or unpaid meal period (engineering aids and staff assistants)	13.4	66
Paid meal period requirement	13.4	66
Minimum time between shifts	13.1	63
No Saturday/ Sunday premium if not RDO	13.1	63
Notice of shift changes	13.1	63
Overtime for hours over 40 in workweek	13.1	63
Paid lunches and breaks	13.1	63
Timekeeping workweek	13.1	63

<u>Subject</u>	<u>Contract Section</u>	<u>Page(s)</u>
Unpaid lunches for certain positions	13.1	63
4-10 Work Schedule	13.2	64
Days of work and rest in 7 days	13.2	64
District right to establish 4-10 work schedule	13.2	66
District right to determine 4-10 staffing pattern	13.2	64
Meal periods	13.3-4	66
No reduction in staffing as a result of 4-10	13.2	64
Paid lunches and breaks	13.2	64
Shift differential based on designated shift	13.2	64
Ten hours in a work day	13.2	64
Vacation, holidays, and sick leave while on 4-10 schedule	13.2	64
Waiver of conflicts with other contract provisions	13.2	64

2009

January

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16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

October

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

November

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

December

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

2013

January

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	18
20	21	22	23	24	24	26
27	28	29	30	31		

February

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

March

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

April

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

July

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

September

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				